

<p>RFP-RH-23-035 Recreation Management Software Proposal Summary</p>	<p>Company Name Amilia Technologies</p> <p>City, State Montreal, Quebec, Canada</p> <p>Company Background 2009 technology investor Francois Gauette realized sports/rec industry disorganized/disconnected. He created Amilia envisioning The Amazon of Activities - a central platform where people can access all activities around them, and organizations can help communities thrive. Canadian based company that provides cloud-based software solutions to recreation organizations throughout North America. SmartRec solution centralizes all operations to allow organizations to manage rec programs, etc. Serving more than 1,400 clients and 6000 locations in 300 different cities across North America. Headquartered in Montreal, Quebec. Providing SmartRec since 2010. Do not outsource development and support.</p>	<p>Company Name Civic Plus LLC</p> <p>City, State Manhattan, KS</p> <p>Company Background Began in 1998 when founder Ward Morgan decided to focus on helping local governments work better and engage their residents through web environment. Portfolio includes solutions for website design and hosting, parks and rec management, emergency and mass communications, agenda and meeting management, 311 and CRM, process automation and digital services, codification, licensing and permits, web governance and ADA remediation, social media archiving, and FOIA mgmt. 12,500+ customers, 900+ employees. 340 million resident engagement. All services performed in house. Civic Plus only government technology company exclusively committed to powering and empowering governments to efficiently operate, serve and govern using technology solutions.</p>	<p>Company Name DaySmart Recreation</p> <p>City, State Ann Arbor, MI</p> <p>Company Background All-inclusive web-based application hosted at AWS (Amazon Web Services). DaySmart is a local Michigan company whose goal is to build strong partnerships with their customers and continually improve their products to meet the expanding needs of those customers. Founded in 1998 with a mission to provide businesses with innovative , easy to use applications to seamlessly serve their clients and help them grow. The company has completed 3 strategic acquisitions over the last 2 years to help provide the best software solutions. DaySmart acquired Dash Platform, LLC in July of 2021 which is a sports & recreation facility management platform. In March 2022, Dash Platform was rebranded to DaySmart Recreation. In September 2022, they acquired TeamUp - which has a focus on providing the best member/fitness management software for fitness studios, boxes and gyms. And lastly, in March of 2023, the company acquired R.C. Systems Inc, the makers of ReCPro Software - which was a leading software solution provider in the Parks & Rec Management market.</p>	<p>Company Name RecDesk Software</p> <p>City, State Middletown, CT</p> <p>Company Background Conceived in 2005 by founder, owner and current President Mike Morris. Ease-of-use is a guiding principle for RecDesk. RecDesk currently serves approx. 1,000 clients in 48 states. Primary office in Middletown, CT where roughly half of the 25 employees work (others work remotely). Majority of clients are municipal parks & recreation offices, while they also serve park districts, community centers, aquatic centers, senior centers and school districts. RecDesk includes complete implementation management. The implementation plan will be co-authored with input from the Parks & Rec management to address specific priorities, coordinate training, establish benchmarks and set milestones.</p>
<p>Understanding of Project</p>	<p>Activity Registration - A key benefit of SmartRec is ability to offer admins a tool to simplify and shorten time to input programs and minimize program errors. Has a single interface that allows admin to complete all required tasks to create an activity, schedules, book staff/facilities, resolve conflicts, set registration periods, and determine all configurations for activities. Hierarchy of all programs is Program, Category, Sub-Category then Activity.</p> <p>Waitlists - Can be managed manually or run automatically. Staff will be able to perform registrations on behalf of clients or override any restrictions. Have customizable permissions to restrict/approve access to various modules and features. Historical data is kept in SmartRec database.</p> <p>Calendar Sync - Send calendar invites when a client registers to a program, etc.</p> <p>Facility Reservation - Robust tool allows ability to know exactly what is going on across organization. Simple to add rentals/bookings, modify them, 1-click cancel and maintain the organization rules/fees. Multiple options to offer, invoice bookings. Public Calendar Module in order for clients to see bookings and what is available. Pricing schedule assigned as well.</p> <p>Membership Management - Can create memberships of varying types and terms. Key benefits are Netflix style auto billing, ability to 1 click mass update membership prices, sort member lists for easy analysis. Impact allows optimization of staff and straightforward experience for clients. Additionally offers own member form and waiver, digital membership card via app, pause, cancel adjust memberships.</p> <p>Access Mgmt - Easily track attendance and membership types. In 2022 because of system went 1855 expiring card notifications for recurring billings or installments of the 1855 had an 85% success rate.</p> <p>POS- Multiple workstations can be set up so transactions can be executed simultaneously by staff.</p> <p>League Mgmt - Configure registration for team signup/league signup. Electronic process for signing of waiver/roster.</p>	<p>Activity Registration - Staff can quickly create programs, indicate flexible pricing, attach waivers and promotes, and assign instructions. Easily take registrations in-house or allow residents and non-residents to register securely on the device of their choice. Email branded receipts and permits Utilize load balanced server and can scale to accommodate any volume.</p> <p>League Management - Easily create leagues, draft players, assess skills, and generate schedules. Sign-up is easy for teams or individuals. With "Scores & Schedules" and "Parent/Player Portal" public and league participants will have easy access to current league information.</p> <p>Membership Management - Sell memberships or punch cards, take member photos, print cards or associate barcode key tags, and check people into a facility. Leave credit and debit cards on file for future and recurring payments. Staff can see history of account's transactions.</p> <p>Volunteer Management - Tool creates, manages, and organizes your volunteer opportunities. Within the Activity module you can create volunteer roles and assignments specific to events, classes, or activities. Residents can select and register for volunteer roles from home and our Recreation Management system will assist in tracking the time volunteers spend helping around the community with completely integrated reporting for tracking purposes.</p> <p>Facility Reservations - Easily take in-house and online reservations as well as reserve spaces for classes and sports with an integrated master calendar to avoid double bookings. It's easy to see availability with grid and map-based views with attached photos, descriptions, and rental rates. Generate and email complex permits as well as include waivers, prompts, and attachments for a complete checkout process.</p> <p>Reporting/Financial Accounting - Over 100 canned reports. Staff can fully customize and save reports to display needed information in format desired. Filters and fields can be added and removed. Reports can be sorted, saved, emailed, exported to Excel, or scheduled for regular delivery to any email address.</p>	<p>Activity Registration - offers a functionality that is easy-to-use and secure. Online portal allows City to use images for each program group to enhance customer experience with visual cues for the different program groups being offered. City Logo and site colors can be customized to match branding.</p> <p>Calendar Sync - Program includes a list of upcoming events for customers through the online customer portal and also has links to sync those events with the customer's personal calendar.</p> <p>Facility Reservations - Program offers a robust facility reservation system that includes an in-house facility calendar allowing users to manage all reservations from one master screen. Internal calendar allows editing and drag-and-drop capability to move events. Customers can request or rent facilities online through portal. City can upload specific Terms and Conditions for each resource or event type so it is included in rental agreement.</p> <p>Membership Management - Program offers flexible membership/pass options for ongoing memberships, seasonal passes, punch passes, etc. Members will store a card or bank account info to auto charge monthly membership dues. Online customer portal offers digital barcoded member cards and the City can issue barcoded key tags if preferred.</p> <p>Point of Sale - Program offers an easy-to-use , touchscreen POS application to sell inventory or service items. The POS app can be operated from a tablet which can interact with all peripheral devices. The City can create/customize multiple POS Menus for the purpose of selling different items at different venues. Each category/selection can be customized with a label/image based on the City's preferences.</p> <p>League Management - Offers features that allows City to easily manage both Youth & Adult leagues that register either by team or by player. Addtl features include scheduling games, entering results, calculate standings, online team messaging. Currently no function for tournament scheduling or drag-and-drop adjustments.</p>	<p>The City's objective of achieving consolidation, modernization and ease-of-use are fully appreciated and understood by RecDesk.</p> <p>Activity Registration - Ability to easily register for activities both in-house and securely online. With a fully designed registration page to visually match our department website, along with an easy-to-use and search course catalog.</p> <p>Calendar Sync - Ability to export event information to end-use Google and Outlook Calendars.</p> <p>Facility Reservation - Ability to reserve a variety of facilities in person and online. Customizable permits with all pertinent information regarding the rental.</p> <p>Membership Management - Ability to create a variety of memberships; sell memberships, punch cards, or key-fobs in-house or online; scan memberships in and out of facilities; as well as set recurring member billing and streamline payment for departments and citizens.</p> <p>Point of Sale - Ability to sell merchandise, track inventory, collect donations. Must work with iPads, cash drawers, barcode readers, receipt printers and credit card readers with touch screen capabilities.</p> <p>League Management - Ability to set up registrations by team or individual online or in person, manage assessments, track game results, auto-schedule games and tournaments.</p> <p>Ticketing - Ability to create, sell and scan tickets for events in-house online or from a mobile device.</p> <p>Merchant Options/ Credit Card Processing - Ability to integrate credit card processing with their Point and Pay system, or to use a vendor provided credit card processing gateway for facilities, activities and point of sale items.</p> <p>Optional Lighting Integration - Managing the lights at athletic fields would be a benefit to the City</p> <p>Mobile Responsive - The solution's interface is responsive to mobile devices such as tablets and phones without losing the functionality found on a desktop.</p> <p>Surveys - The solution can send out automatic surveys requesting feedback after an activity or rentals.</p>
<p>Ticketing - Tickets can be created. Done through Programs module.</p> <p>Credit Card Processing Options - Handled by Paysafe for all invoicing. PaxA920 payment terminal.</p> <p>Mobile Responsive - SmartRec is responsive and designed to be used on all devices, including mobile. Native User app offered through Apple App Store and Google Play Store.</p> <p>Surveys - Not a survey software, but offer integration to Zapier where survey solutions exist and can be integrated into SmartRec.</p> <p>Reporting/Financial Accounting - Easy access to critical financial reports, sales, payment ledger, facility and membership reports. Glance at demographic and accounting statistics for each program. Some reports are standard and cannot be customized. Financial data can be exported in excel format.</p> <p>Email/SMS Blasts - mass-email reminders possible to send to registrants as often as like. SMS capabilities have an integration with Pldj,co that allow organizations to create text messages.</p>	<p>Ticketing - Generate general admission tickets for events. Public users will receive their tickets and receipt, which are always available in their transaction history. Tickets can then be printed or shown on phone display to be scanned into mobile or desktop check-in screens.</p> <p>Catalog Point of Sale - Quickly sell merchandise, enroll participants, and reserve facilities all in sale cart. For merchandise and inventory , an integrated inventory control will tell how many of each item available.</p> <p>Scholarship - Can create both pre and post billed scholarship types. Staff will have complete control over which program scholarships can be used to help pay for a program.</p> <p>Marketing/brochures - Can produce an InDesign friendly export that should facilitate the process of generating a brochure. Social media tools service as an additional marketing method.</p> <p>Email/SMS blasts - Several links w/in Recreation mgmt. that allow for email blasts. Many of reports and roster views allow for mass mailing. SMS is available to facilitate time sensitive messages.</p> <p>Group Permission Levels - Customize staff experience by creating access group and setting permissions tailed to individual staff member's roles.</p> <p>Surveys - Automatically receive surveys requesting feedback.</p> <p>Resident/Dashboard Mgmt. - Conveniently view notifications, upcoming events, tickets and receipts. Family or organization members can be added for easy activity registrations.</p> <p>Mobile Ready - Same experience on phone/tablet that you get on desktop.</p>	<p>Ticketing - Offers event ticket functions that allow City to sell and scan general admission tickets. True tickets are not generated or printed, so customer will need to use their receipt QR Code as their ticket. Customers may purchase more than 1 ticket online and do not need to name guests. Customer needs account to purchase tickets online.</p> <p>Merchant Options/Card Processing - currently integrated with CardConnect and Stripe. The City can choose between either processor. Both support Apple & Google Pay.</p> <p>Mobile Responsive - optimized for mobile devices for both City staff and residents. Free Mobile app for both staff and residents that can be downloaded.</p> <p>Surveys - does not currently have a built-in survey function, but this function is hopefully in future development.</p> <p>Reporting/Financial Accounting - equipped with all critical financial reports that can be used on a daily basis to reconcile cash drawers and report daily sales/revenue. Reports can be saved/exported/emailed. Also equipped with functioning that allows City staff to export daily financial to a .csv file that is formatted for a BSNA upload.</p> <p>Email/SMS Blasts - equipped with email and SMS capabilities. Automatic alerts or reminders can be sent out or can be initiated manually for emergency or marketing purposes. System has FREE emails/SMS, but for professional email & SMS services for enhanced messaging capabilities, the City will need to opt in and pay any applicable fees.</p> <p>Optional functionality - Lighting Integration - program has begun an integration with lighting companies, but has not completed integration. It is a function that will hopefully take place in future development.</p>	<p>Reporting/ Financial Accounting - The solution will provide completely customizable reports that can be saved, emailed or exported.</p> <p>Email/SMS Blasts - Ability to automatically send out emails and SMS messages to registered participants and patrons in the database.</p>	
		<p>Hardware Compatibility - opt for a variety of hardware peripherals to enhance experience with magnetic stripe readers, barcode readers, thermal printers, cash drawers and more.</p> <p>Credit Card Processing - CivicPlus Pay is integrated secure PC compliant utility application.</p> <p>Several integration options.</p>		

Company Name	Amilia Technologies	Civic Plus LLC	DaySmart Recreation	RecDesk Software
City, State	Montreal, Quebec, Canada	Manhattan, KS	Ann Arbor, MI	Middletown, CT
Qualifications/Experience	<p>Do not use 3rd party consultants.</p> <p>Alexis Philippe - VP Product & Eng: 16 yrs. exp in software development ind.</p> <p>Lisa LeBrun - Director Customer Success: 20 yrs. exp in client services in technology companies.</p> <p>Christina McKenna - Mgr. Professional Services: Diverse professional background. 10 years work experience.</p> <p>Nicolas Fortin - Implementation Consultant: Diverse range of experiences.</p> <p>Karen Rahhal - Project and Change Mgr. Coordinator: Diverse background in project mgmt., change mgmt., sales and marketing training.</p>	<p>Brian Stapleton - GM of Recreation Mgmt.: 8+ Yrs., responsible for product strategy, marketing and sales, implementation and customer support.</p> <p>Emily Fenwick - Manager of Implementation Teams: 12+ Yrs. experience, responsible for guiding and supporting through production phases of building recreation management catalog to meet needs of community.</p> <p>Paige Thomas - Manager of Customer Success: 8+ years experience, Upon closeout of implementation Paige assigns a customer success manager to account and they partner with you to create ongoing strategy</p> <p>Craig Stephens - Mgr. of Technical Support: 10+ Years Exp, manages technical support team.</p> <p>Jim Flynn - Director of Information Security: 20+ Years Exp, manages security and hosting reliability of system.</p>	<p>Most training staff are former users - greater user experience during onboarding.</p> <p>Dale Geiger - VP of Parks & Rec Sales/ 30+ years experience / 350+ Implementations/ Responsible for creating RFPs, providing addtl info on DaySmart Rec, and completing vendor interviews and demos/ graduate of CMU in Management Information Systems</p> <p>Tim Danksin - Director of Client Success/ 8+ years experience/ Responsible for managing the entire implementation and post implementation/ 400+ implementations/ Graduate of Bellevue College</p> <p>Angel Horowitz - Client Operations Manager/ 2+ years experience/ Responsible for Managing entire implementation / 40+ implementations/ Graduate of Liberty University with Masters in Science</p> <p>Krisi Carlson - Enterprise Support/14+ years experience/Responsible for database setup, software config, and testing/ 100+ implementations/ Graduate of U of Washington - Psychology</p> <p>Chase Ludy - Software Trainer & Implementation Specialist/ 5+ years experience/ 5+ years experience/ Responsible for lead training/ 60+ implementations/ 2 years studying Business at Central Washing University</p> <p>Mariko Uchida - Software Trainer & Onboarding Lead / 1.5+ years experience/ Onboarding lead and implementation specialist/ 25+ implementations/ 3 years studying business at Virginial Wesleyan College</p> <p>Anthony Tippett - VP of Payments / 20+ years experience/ Responsible as Payments Integration Manager/ 300+ implementations / Graduate of University of Oregon in Computer Science</p>	<p>Mike Morris - Founder/CEO - brings 30+ years of experience designing and managing enterprise systems.</p> <p>Tim Bracken - Major Account Executive - 8+ years experience in parks and recreation software. Worked with 300+ agencies in 41 states and brings a consultative approach to creating long-term success for his clients.</p> <p>Megan Jackson - Director of Customer Experience - Manages a team of Customer Success Managers who usher the client from the sale through to "going live" and throughout the entire training and implementation process.</p> <p>Justin Waz - Director of Sales/Marketing - 15+ years of experience in sales and sales management. 7+ years at RecDesk and has help grow the company through new customer acquisition and partner relationships . He has chaired a local parks and rec commission for 5 years and is currently a vendor representative for CRPA. Has a Masters in Business Administration and and Undergraduate in Sports and Leisure Management - giving a unique ability to understand and relate to diverse customer needs.</p>
Proposed Solution/Strategy/Methodology	<p>Streamlines the process of managing various activities, including lessons, classes, camps, and events. Organizations easily create and manage schedules, set capacity limits, and allow customers to register and pay online. Solution facilitates efficient booking and mgmt. of facilities. Organizations can define availability, automate reservation processes, and allow customers to reserve online. Offers robust account mgmt. capabilities allow organizations to track customer profiles, purchase history, and interactions. CRM functionality, organizations can enhance customer relationships through targeted marketing campaigns, effective communication, streamlined customer service with tools and interaction.</p>	<p>Designed exclusively for municipal parks and recreation departments by former park and rec leaders. Its comprehensive activity, facility, membership, staff, volunteer and point of sale features are easy for staff to update and custom configure each season. A project plan includes the following phases: Phase I: initiate, Phase II: Analyze, Phase III: Design & Configure, Phase IV: Optimize, Phase V: Launch. During initiate and analyze the city and CivicPlus will work together to determine and ideal project plan based on departments goals and contracted items. RH will learn the ins and outs of the system through four Core Curriculum trainings and three A&A elective sessions. Implementation consultant will train team on necessities of the system and tailor trainings based on specific needs. Expected that RH will test every item in their new catalog for practice and QA. After training, RH enters optimize and launch phases where you will work with implementation team to prepare to launch to your community. Once ready to launch will place a link on website, social media, and email communications to direct customers to your new recreation management catalog.</p>	<p>Program includes features that meet and in some ways exceed the needs of the City. Core Features include - Registration/ Reservation/ League Management & Scheduling/ Membership and passes/ Inventory Control and POS/ Online Portal/ Financial. There are many more standard features, for example: GIS Integration/ Payment Plans/Mass Communications/ Event tickets and reminders/Mobile check-ins/ etc.</p> <p>Realistic timeline for integration is 12-15 weeks. For example, if implementation started Nov. 1, the goal of going live would be Feb 1st-15th. Implementation would be a combination of virtual training and e-learnings. Recommended that 1-2 staff members act as project managers. During training, there would be training tests to input practice transactions. Data Migration is optional and would be limited to active accounts/memberships/active codes and future events. They would need to be exported and the cost of Data Migration is \$225/hour.</p> <p>Methodology Timeline - Onboarding -> Implementation -> Training -> Go-Live Prep -> GO LIVE -> Post Go-Live -> Support</p>	<p>RH P&NR will have access to 100% of their features and capabilities, including:</p> <ul style="list-style-type: none"> - Customizable community website/portal with CMS tools, Online registration/mobile-friendly online registration, in person/phone registration, program management, league management and auto scheduling, Facility management/reservations/requests, POS, invoicing and permitting, digital checking and/or attendance tracking, Email and text messages, CRM+ advanced report keeping/note/document uploads and task assignments, flex forms, integrated payment processing, financial reporting and reconciliation, unlimited users, financial and system reports, viewable and downloadable, secure/scalable hosting with AWS. FlexRegistration - gives ability to offer flexible enrollment options for classes, camps, after-school programs and more. Patrons can select individual days or sessions, essentially customizing their schedule. Flexforms - allows you to re-create any paper based form and include it in the natural workflow of any registration, reservation or enrollment. Also allows registrants to upload required docs and sign digital signatures. FlexCalendar - Can be used internally or mirror your community portal for public viewing. Allows you the ability to filter your calendar by facility, facility type, reservation type, and custom tags. FlexScheduler - Ability to launch complicated recurring reservations and events/ Ability to build in setup and tear down times/ Meet the challenges of an event that takes place at various venues and fields/ Ability to quote for formal events such as weddings and banquets/ ability to accommodate various add-on fees, incorporate inventory, and generate invoices. RecDesk CRM+ - focusing on the customer relationship and making them the center of program.
Training and Support	<p>Comprehensive Training Program modelled after the Miller Competency Framework. Approach builds learner's proficiency in phases and ensures all individuals have skills they need to continue beyond implementation. Phase 1: Self-Paced Discovery, Phase II: Virtual Instructor-Led Training, Phase III: Live Training Workshop, Phase IV: Knowledge Sustainability. Offers Self-Serve training via Amilia University Online Courses, Instructor-Led Training conducted live by assigned Implementor, Consultant through teams or in person, JIT learning via detailed Help Center articles and ongoing webinars.</p>	<p>RH Training plan includes branded public page, 16 hours virtual training.</p> <p>Core Curriculum - Configuration training, Facilities Training, Activities Training, and Daily Operations Training.</p> <p>Electives or Q&A's - Leagues Memberships, Campgrounds</p> <p>Q&A sessions</p> <p>4 hours virtual consulting.</p>	<p>Program offers training documentation and a library of 'how-to' videos along with an e-learning system. The onboarding team will gather business critical information during a scheduled Business Process Review (BPR) call with the admin team so that they can better understand our business processes and to start crafting lists of courses/facilities/codes/employees, etc.</p> <p>Training dates will be scheduled during onboarding call and will last approx. 2 hours. In between sessions, the users will spend time inputting data into software.</p> <p>The entire implementation period will last approx. 12-15 weeks and include approx. 25 hours of virtual training.</p> <p>Once system has been setup, the training sessions will get scheduled for customer facing and end user training - focusing more on day-to-day use of system.</p> <p>At conclusion of training, a demo/training database will be created that contains data specific to the City to make it more meaningful for users.</p>	<p>During the onboarding process, RH will be assigned a dedicated Customer Success Manager to train you from training to being an expert with the program. Once "live", RH will have direct access to the customer care team. The onboarding process will vary from each customer since not every community's needs are the same. Most clients take 8-12 weeks to launch successfully.</p> <p>First week: Create account and receive welcome email from Customer Success Manager</p> <p>First month: Customer Service Manager (CSM) will conduct kickoff meeting with conference call to discuss introductions, milestones and expectations, technical integrations, etc. Training strategy will be created.</p> <p>Design will be established and begin, go-live date will be assessed, payment processing will be configured.</p> <p>Implementation tactics will be discussed with Tech support.</p> <p>Second-Fifth month: Testing will be conducted on any updates. The CSM will schedule trainings/training method will be determined/and go-live dates will be discussed and will be worked towards.</p>
Vendor Questionnaire Included (yes/no)	Yes	Yes	Yes	Yes
Client References Included (yes/no)	Yes	Yes	Yes	Yes
Exceptions	None	Yes	None	None

RFP-RH-23-035			
Recreation Management Software			
Proposal Summary			
Company Name	Univerus	Vermont Systems	Xplor Recreation
City, State	Port Moody, British Columbia, Canada	Essex Jct, Vermont	Burnaby, British Columbia, Canada
Company Background	<p>Global company headquartered in Pennsylvania and British Columbia. The company was formed in 2019, but their product brands have been serving hundreds of customers in local government organizations and utilities for over 21 years. The company was started with a vision to develop an integrated suite of products that will help organizations successfully implement digital transformation projects.</p> <p>Employs over 150 employees, operating out of 13 offices in 6 countries and they represent the legacy of 14 companies to date.</p>	<p>Market leader in providing comprehensive Recreation Management software solutions. They have been providing software solutions to the municipal market since 1985 and specifically to Parks and Rec fields since 1988. They have completed over a thousand municipal installations. They are a wholly owned subsidiary of Clubessential Holdings Co. The company was initially established as a value-add reseller of banking, municipal and other software apps. In 1992, VS opened a second related market when it signed a contract with the US Air Force to provide recreation software for all Air Force bases worldwide. Today, VS has over 1200 customers, including 800 municipal and county agencies, several private organizations, Universities and US Army, Air Force, Marine and Navy bases worldwide.</p>	<p>The roots of Xplor Recreation began in 1998 when a martial arts studio wanted to better serve their students when it came to registration. The base program was launched in the early 2000s and in 2015 they broadened their customer range. They now serve over 300 recreation-based organizations. Xplor Technologies was formed in 2201 from the merger of Clearent and Transaction Services Group (TSG). Xplor Recreation performs 100% of their own work and does not use subcontractors.</p>
Understanding of Project	<p>** Vendor Response Formatted Not As Requested**</p> <p>Software/Application features: unlimited user accounts/unlimited client records/integrated invoicing and reporting/ unlimited telephone support and online help/ document management in making sure client has all documents required/ digital signature request system.</p> <p>Account management: customers can create own account and manage their activities. City branding is incorporated. Non-resident/resident fees can be configured.</p> <p>Record Management: program supports record management for city needs. Has the ability to create/update/and delete account information as directed by the City. Security and access to data in the application is controlled by role-based authentication. Program has lock out and read-only settings to control access. Program has a full audit trail check for security purposes on all transactions.</p> <p>Online access: allows customers the ability to manage their attendance schedule, register, access a facility, buy passes, etc.</p> <p>Public Access Module: Program offers an easy-to-use customer experience. Highlights all city offerings, provides an e-commerce service, allows public to search and view info on any activity, offers customizable page layouts, easily locate any activity or facility with the search options, and easily accessible calendar views.</p> <p>Member Management: Membership management tools can help automate the business processes involved with maintaining membership records and billing activities. Offers time based or punch card memberships to track usage, members can select activities that they are only qualified to purchase, printable photo IDs, recurring credit card payments for ongoing memberships, payment plans, offers POS module for all transaction needs, drop-in quick sales offered, itemized receipts, multiple payment methods.</p> <p>Payment Provider: Program is currently linked to Global Payment Integrated, Clover, PayPal, or Chase Commerce.</p> <p>Personal Training Scheduler: option to use the staff scheduling module to schedule in personal trainers for scheduling/pay purposes. "Self-entered shift" so the personal trainer can log their time, have mgmt. approve, and export to payroll.</p>	<p>** Vendor Response Formatted Not As Requested**</p> <p>VS (Vermont Systems) is a current customer. They are proposing their RecTrac SAAS Parks and Rec management software solution to the city.</p> <ul style="list-style-type: none"> - Provides comprehensive financial tracking and management tools - including audit trails and reporting. - Marketing & patron communications - allows you to generate any number of customer lists for focused customer communications. Allows you to email/text and SMS text any target audience. - All customer/patrons will have a 'household' account in RecTrac. This will store customer information and can be edited at any time. This will be accessible through all modules of RecTrac. - Membership management - passes/memberships can be issued for fixed dates/default period passes/ never expire/punch passes. Can be tracked through ID cards, key fobs, RFID wristbands, etc. - Check-in : called Visit Processing - provides for a complete check-in feature. Can manage entry points for all facilities. Members can use their fobs/cards/etc. to scan for entry. - Activity Registrations - registration module provides for the creation and management of all your programs, classes, activities and camps. Manages all enrollments, instructors, brochures, etc. Can ensure that enrollees meet criteria and that appropriate fees are being paid. - Registration virtual waiting room - designed for high volume registration - If too many people are registering, they will have all registrants put in a waiting 'queue' and then release to the site when ready. - Activity Registration - Flex Reg Management - Allows flexibility with scheduling 'day classes' and adjusting the fees appropriately. - Global Sales Function - Allows for any number of line items, across all modules, to be processed in a single transaction - including cancellations. For example, signing up for a class, renewing a membership - all in one transaction. - Facility Reservations - RecTrac Facility Reservation module provides for all facility reservation functions both in-house and online. You can manage schedules for rooms, fields, gyms, parks, etc. 	<p>Xplor enables their clients to drive their operations, including memberships, facilities, bookings, finance, POS, marketing and more.</p> <p>Facility Reservation & Scheduling - module is optimized for use on all devices, and the facility calendars provide staff and customers with a real-time view of availability across your network of fields, swimming pools, courts, arenas, and other public-facing amenities, and their integrated conflict manager eliminates the risk of double booking. Easily reserve events that cover multiple days and venues. Customizable prime-time and non-prime time fees for booking facilities is an option.</p> <p>Activity Registration - Provided with Xplor Rec: scheduling conflict management/ discounts or promotions available by time or number of participants/ automatic notifications through text, email or mass voice broadcasting/ automatic creation of semester and season programs/ pre-requisites/ multi-activity registration/ league scheduling / initiate season rollover/ set online enrollment dates/ restrict fees based on residency and membership status/ waitlist and full roster management.</p> <p>Membership Management and Tracking - helps you manage different categories of memberships including: unlimited, ongoing, perpetual/ limited by time/ limited by class/ limited by time and class/ limited by date range. Allows multiple options for client identification such as turnstiles, self check-in, card scans, punch cards, personal ID. Member profiles can be customizable as well with notes, pictures, etc.</p> <p>POS - POS module streamlines the checkout process for both customers and staff putting the functions they do most often at their fingertips. Easily record sales transactions, print or email receipts fur customers, manage product pricing, discounts, and inventory. Available to process: inventory management/item grouping/gift cards/equipment rental/ ticketing/ drop in classes.</p> <p>Financial Reporting/Cash Drawer Functions - internal general ledger that tracks financial accounting for all transactions. GL posting are transferred to your 3rd party accounting system (JD Edwards) via an export file. Financial exports/imports can be manually done by City staff or automated on a preset schedule.</p>
	<p>Group Exercise Class Scheduling: Registration Module provides a complete and affordable registration solution, and allows you to efficiently manage enrollments, invoicing and reporting of all your organization's programs, events and activities. In this module you can: manage programs/manage enrollments/ manage wait lists/manage families and groups/ manage instructors and payments/ attendance and course completion/ course enrollment filters.</p> <p>Scheduling & Rentals (lockers and equipment): With the Scheduling Module, you have the ability to: manage facilities and resources/ configure user groups/ update and track client info/ search facility availability - staff or public can search for facilities and multiple time slots at the same time for availability/ apply conflict bookings by setting conflict rules to subdivide facilities to prevent conflicts and double bookings/ service scheduling by allowing customers to book equipment, resources and services along with a venue and also monitoring inventory control/ create workflows for booking approvals and notifications.</p> <p>Digital Waivers: Ability to create and email documents such as waivers, contracts, travel forms or applications. You have the ability to request a digital signature from known clients.</p> <p>Finance and Reporting: Includes a complete inventory of pre-built reports which provide staff quick access to the business information required for their roles and to serve their customers. The program can implement filtering options within its reporting structure to allow staff to create and save their favorite reports. Ability to make edits to existing reports and create new, customized reports that can be designed by internal staff.</p> <p>General Ledger Coding & Exporting: Financial data can be exported as an Excel file which can be used to import financial data into your Accounting Software.</p>	<p>Campsite/Equipment Rentals - module can be used to manage facilities, such as campsites, marina slips and RV storage equipment's.</p> <p>League Registration & Scheduling - League module allows you to create leagues, populate them with teams and players, generate schedules, track scores, etc.</p> <p>Brochure Interface - program allows you to export a brochure for your activities information.</p> <p>Instructor/Staff Management - has the ability to add Staff into the system and link them as instructors/referees/personal trainers, etc. Can assign various pay rates, and generate a payroll report.</p> <p>POS - POS module is a full inventory control module that provides for the creation and sale of inventory items, service items, tickets, donations, gift cards, etc.</p> <p>Ticket Sales - Through the POS module, RecTrac allows for the sale and printing of admission tickets.</p> <p>Reporting/Analytics - RecTrac currently provides over 370 standard report outputs. The Report Output Management program provides ability to edit existing reports or create new custom report. You may also schedule them to automate runs.</p> <p>Financial Accounting - Allows for the option to run as a cash or accrual based system. In an accrual based system, revenues are reported on the income statement when they are earned. On a cash basis, revenues are reported on the income statement when the cash is received.</p>	<p>Online portal - there is no need to download an app and the site is easily accessible for phones and computers. Visitors will be able to view class schedules, register for courses, book facilities, purchase memberships and manage their accounts.</p> <p>Customer Database Management & Reporting - database updates in real-time to provide most up-to-date information to the City's staff. Staff can search for customer's by first name, last name, email, phone or customer ID. Standard fields can be edited or you can create your own custom fields. All data captured can be exported directly from the Report Module.</p> <p>Informed Consent/ Waivers - built-in management module for all client documents such as membership contracts, facility rental permits, waiver and liability consent forms. Option to obtain physical or electronic signatures.</p> <p>Maintenance Scheduling - communication with maintenance staff can be done through an interface on screen or via reports.</p> <p>Marketing & Communications - Communication through Xplor Rec can be done by voice broadcast, text messaging, and email. There are customizable email templates within the system to use or you can create your own. You can schedule them to send at a later date or immediately. Clients can login with their social media and in turn post activities to their social media accounts from Xplor Rec.</p> <p>Tech Features - high security, 24-hour backup, disaster recovery plan, site redundancy protecting against hosting facility outages. Xplor Rec is hosted on Amazon Web Services (AWS) and client info is housed in multiple data centers, geographically separated to maximize risk mitigation. Clients have dedicated databases which are individually encrypted for protection. The City will always retain ownership of all data and can extract data from the database any time. Audit logs are provided throughout Xplor Rec, allowing you to see which user made what changes and the time it occurred.</p> <p>Lighting Integration - Xplor is integrated with automated lighting systems to trigger lighting on and off automatically through Musco Sports Lighting as well as Skylocix Lighting. Once a facility is scheduled, a signal will be sent out to the specific terminals to turn on and off the lights.</p>

Company Name	Univerus	Vermont Systems	Xplor Recreation
City, State	Port Moody, British Columbia, Canada	Essex Jct, Vermont	Burnaby, British Columbia, Canada
Qualifications/Experience	<p>Over 150 staff and just under 50% being in the R&D and Engineering divisions.</p> <p>Jeff Downie - EVP, Sport & Recreation - 20 years' experience in employment scheduling and communication.</p> <p>Jeffrey Eldridge - Sales Director - Over 10 years of experience in account management in the IT industry. The past two years with Univerus Rec as Director of Sales & Marketing - Account management, sales team management, market analysis, business development, advertising, strategic partnering and product management.</p> <p>Sophie Burns - Training & Support Manager - more than 8 years' experience implementing Univerus Rec solutions to locations across North America.</p> <p>Michael Grobe - Client Success Manager - 20+ years in communications, marketing and project management roles based in government and not-for-profit institutions.</p> <p>Jonathan Schlackl - Senior Developer - Over 20 years of application development experience ranging from web applications, mobile apps, systems integration and more recently, blockchain and decentralized application development.</p> <p>Colin Cameron - UI Developer - Software Engineer - Over 15 years of experience in frontend web development and graphic design. 6 years' experience in enterprise parks and recreation software.</p> <p>Vincent Tsai - Developer - 2 years' experience working on business enterprise software.</p> <p>Robin Leek - Client Success Specialist - Robin has more than 4 years experience in building close relationships with customers to understand their business and operational needs, technical challenges and help them achieve the greatest value from the program.</p> <p>Jacob Lynn - Client Success Analyst - 8 years in the Parks and Recreation industry with a variety of positions and experience.</p> <p>Janet Sawicki - Client Success Analyst - 10 years progressive experience working in customer service for the City of Surrey and the City of New Westminster.</p>	<p>Brian Hatch - Implementation Manager - manages all aspects of the implementation process, successfully served 10 years as an Implementation Consultant, and 5 years as a Senior Consultant.</p> <p>Patrick Hayden - President, VS - Experienced software executive working for VS since 2003.</p> <p>Bryan Gillilan - VP of Product Management - Bryan is responsible for developing a cohesive product strategy and has been since 2006.</p> <p>Rob Coli - Director of Operations - responsible for execution of support and services across all major branches of the military. Has been part of leadership team since 2018 and with VS since 2012.</p> <p>Andrew Bose - Director of Development - responsible for software development. Has been with VS in customer support and development roles since 1999.</p> <p>Lauri Thurber - Controller - responsible for maintaining financial processes, policies and internal controls. Lauri has over 25 years experience in the field and has been with VS since 2020.</p> <p>David Wirtz - Director of Sales - Responsible for sale/marketing of VS products, as well as assisting with the research of other products for integration. Has been performing customer support and sales roles since 1996.</p> <p>Mike Skitzis - Director of Hosting & IT - Responsible for 24/7/365 customer hosting support services. Has been providing customer support since 2007.</p> <p>Joe Bourassa - Director of Q/A & Documentation - Responsible for ensuring that all application software functions perform satisfactorily before releasing to customer. Has been with VS since 1996.</p> <p>Haven Lopez - HR Business Partner - HR professional with over 10 years of experience in strategic human resources. Has been a Business partner for Clubessings since 2022.</p>	<p>Xplor has led hundreds of project teams through the onboarding process of Xplor Recreation.</p> <p>Mike Baldwin - Project Manger - Experience in leading both client and internal project teams. Mike has the knowledge to manage project schedules and budgets. He is responsible for a range of implementation activities designed to achieve a quality level of client service and satisfaction. He has been with the company since 2016 and is the Implementation Specialist.</p> <p>Alyssa Cangemi - Implementation Team Lead - Alyssa has been with the company since 2016. She has years of experience leading, managing and organizing business initiatives and staff activities, utilizing her implementation consulting and customer service experience. She supports the day-to-day management of the implementations team and projects and owns initiatives to ensure the team is achieving key objectives. In 2022, she was promoted to Implementation Project Manager.</p>
Proposed Solution/Strategy/Methodology	<p>Kickoff - Work with customer to identify key items and define responsibilities and finalize project schedule. These meetings will also include overview training for a good foundation to start on.</p> <p>Design Phase - Focus on configuration needed to tailor the software for use by the users. Trainers will spend time with users to address functionalities such as accounting and Finance, System Admin, and Custom Reporting. This phase will also include tailoring the customer's view.</p> <p>Implementation Phase - Installation of software and introduction to project management team with agenda and milestones provided. Begin transition plan implementation. Two-phased implementation timeline will be determined to suit the City's needs.</p> <p>Training Phase - Administrator(s) training for configuration and setup of the Univerus Rec software. Refer to Training section in Vendor Response for full details.</p> <p>Testing & Final Acceptance - Testing phase will test real-life scenarios covering all user types. Customer will receive access to a test system. This is the last step before going live and includes the implementation of the finalized production software, as well as the user training required to support the go-live efforts.</p> <p>Project Handoff/Closure - Software will support the City with direct training where needed or a train the trainer approach for larger groups. All project requirements will be completed to the City's satisfaction and go-live support begins.</p> <p>Data Import & Conversion - Longest part of the project. Software assistants work with the city to identify where and what types of data is required to be imported into our software.</p>	<p>Implementation Project Administration: VS uses Teamwork Project Management Software. This allows them to track and monitor the numerous tasks involved in an implementation project, keeping everyone organize and making sure all parties are accountable for tasks delegated. Teamwork will be used from that starting point through the entire project to your Go Live date.</p> <p>Onsite or Telephone Survey: For larger installs, an on-site survey would be preferred. For most customers, a remote survey is sufficient. During the survey, the following will be covered: project overview, review schedule, review software, review RecTrac implementation project guide, review RecTrac module features and capabilities, conduct a survey of each workstation to identify what hardware may be required (barcode/stripe readers, camera, monitors, etc.), review connectivity levels, review internet access requirements.</p> <p>Project Staff Assignments: A team will be assigned to your account and they will coordinate VS responsibilities, and assist with implementation and install plan. It is recommended to appoint a 'RecTrac Administrator' to be the decision maker and be most familiar with day-to-day operations.</p> <p>Training: Focus on database setup, RecTrac training sessions, "train the trainer" approach (but they are willing to train as RH desires if more one-on-one is needed), project plans will be created based on training methods and what will work best.</p> <p>Project Planning: VS will assist you through the planning and install phase of the project using Teamwork, Project Management Software.</p> <p>Application Install: Server install is conducted by the VS Cloud Hosting services team. Client will have to only worry about possibly setting up workstations.</p> <p>Data Conversion: allows for import of specified data from a common file format. Historical transaction history would not be converted/migrated. Future reservations and bookings are not brought over but entered as part of training during implementation.</p> <p>Testing: VS Cloud Hosting services team establishes both a production and training/testing database for your organization.</p> <p>Timeline: Planning & Discovery -> Database Build & Training -> Go Live -> Ongoing System Use</p>	<p>Kickoff - Xplor hosts a conference call or meeting with the project team to outline the project structure and explain the approach. Initial timeline will be established.</p> <p>Software Configuration - stakeholders in all departments are provided with up to 38 hours of hands-on training on how to set up the software. The goal is to create the level of knowledge within the core administrator group so you know how to configure and maintain the software without relying on a 3rd party for support.</p> <p>Data Migration (if applicable)- two options to import legacy data - partial migration and manual data migration. Partial migration: program will perform an automated data migration of select City of Rochester Hills data. City will be responsible for cleaning historical data. Items that can be migrated are customer and account info, customer balances, active memberships and GL accounts. Manual Data Migration is recommended for client who want to start fresh, do not have a database, or if the data in the legacy software is corrupt or inaccurate. Clients will need to import all data manually.</p> <p>Power User Training - Implementation consultant will train your selected power users to be proficient with the Xplor software using a train-the-trainer approach.</p> <p>User Acceptance Testing & Staff Training - provides clients with testing templates that will be used for functional testing across each user profile type. City can modify templates as desired and will need to test them. Issues will be communicated back to your consultant in a timely manner for resolution ahead of the go-live date. Training the front end staff will take place.</p> <p>Go-live - Once training is complete, City will sign off on the user acceptance testing milestone, then go live. Consultant will be available to you during the week of go live for any issues that arise.</p> <p>Stabilization - After go-live, there is a stabilization period as real-time scenarios and loads are experienced. Implementation Consultant will continue to be your point of contact during this phase. Project will be handed over from Project team to the Support and Account management team.</p>
Training and Support	<p>Training is delivered in the form of workshops, small group reviews, and individual coaching sessions depending on need (Proposed agenda can be found in the Vendor Response packet). Univerus will support the City with direct training where needed or a train the trainer approach for larger groups. Training will be virtual with the project team. After each session there will be data input requirements by staff that need to be completed before the next training session starts.</p> <p>Ongoing 24/7 Support - typically responding within minutes, but could take up to 2 hours. After business hours, weekends or holidays will be responded to by next business day.</p> <p>Admin Support: Univerus technical staff is able to remote access the modules for any required or requested assistance.</p>	<p>Every system account is provided two environments: a live and a testing (demo) environment. VS has many security measures in place to make sure all our data is kept secure, such as: control areas with surveillance , monthly data security scans, security certifications, data backup schedules, recovery plans, etc.</p> <p>Training & Support provided:</p> <ul style="list-style-type: none"> - Online Screen Level Help - Embedded field level help - - RecTrac Labs (online series of learning courses) - Procedures provided for different processes - Annual Symposiums (and virtual) (three day event consisting of educational sessions) - RecChat - bi-weekly live video chat sessions on a given topic -Web Support Portal - training videos, knowledge base (database for issues and solutions), case management, chat and RecChat library (all sessions). - Topic diagrams - visuals for procedures - Update listings - lists all changes during updates 	<p>All training docs will be provided in soft copy or online format and can be printed and distributed to staff members as needed. Xplor also provides release notes and training webinars for every software release to help you stay up to date on the newest features. Online courses are also available for configuration and Power User training and can be used to supplement training.</p> <p>Support - Through the portal, users can take advantage of extended support hours, informative webinars, and work order tracking. Support team is available by phone, chat, and email 24 hours a day, 7 days a week. Xplor's standard agreement includes 24/7/365 support for all technical issues regarding the platform. All tech support calls will be answered by a live agent. Incident resolution times are tracked within Xplor Recreation and associated with every ticket logged.</p> <p>There are different service levels and how urgently Xplor will respond - for example, "Critical" priority issues will be resolved within the same business day (complete or reoccurring inability to use the platform). "High" priority critical incidents are responded to within 24 hours - such as when recent modifications cause features or functions to have issues or if there are important everyday features that are not performing well. "Low" critical issues will be reviewed and prioritized according to severity and an estimate will be provided to the client within a week. "Low" critical issues are those such as when a minor degradation of some significant features or secondary features occurs.</p>
Vendor Questionnaire Included (yes/no)	Yes	Yes	Yes
Client References Included (yes/no)	Yes	Yes	Yes
Exceptions	None	Yes	None