



Recreation Management Software

Request for Proposal

City of Marion
343 Marion Blvd
Marion, IA 52302

ISSUED: August 2, 2019
PROPOSALS DUE: September 6, 2019 by 4 p.m.

INQUIRIES

Inquiries about this Request for Proposal must be in writing and directed to:

Seth Staashelm
Deputy Director of Parks and Recreation
City of Marion
343 Marion Blvd
Marion, IA 52302
Phone: (319)447-3580
Email: sstaashelm@cityofmarion.org

1. Overview

The City of Marion is seeking proposals from qualified vendors to provide parks and recreation management software to meet the needs of the City’s Parks and Recreation Department. These needs include activity registration, facility rentals, sports league/team management, scheduling, memberships, financial and program reporting, point of sale, mobile access, and web-based integration.

The City of Marion seeks assistance from an experienced company that can accomplish all the functionality identified within this Request for Proposal (RFP). If awarded the contract, the vendor will be responsible for the implementation, project management, training, and data migration solutions to meet the performance requirements as agreed upon. The best software solution will enable the Parks and Recreation Department to provide excellent customer service both in-person and online while efficiently performing the recreation features within the software program.

The selected vendor will need to understand the needs of recreation management to help us achieve our goals while providing additional support in the future.

2. Background

The City of Marion has a population of 40,000. The City of Marion Parks and Recreation Department hosts traditional youth, adult and senior programs for the community. The Department Mission Statement is to enrich Marion and the lives of our residents and surrounding communities by providing a wide range of recreational and educational opportunities for people of all ages that encourage healthy, active lifestyles and life-long learning.

Marion Parks and Recreation currently maintains over 600 acres of public ground including 21 parks and a wide variety of recreation facilities. Included in these facilities are approximately 20 ball diamonds, an outdoor aquatic center, 2 splash pads, and 9 pavilions. The recreation division manages over 70 different programs for children to older active adults.

The purpose of the Parks and Recreation Management software project is to update the City of Marion with a more efficient way to manage our parks and recreation services. We would like to do this while continuing to provide excellent customer service. It is also the desire to make it easier for customers to be able to access those services, not just by contacting staff but via a website compatible with both mobile and computer devices.

3. Schedule

The approximate RFP schedule is summarized below:

Issuance of RFP:	Friday August 2, 2019
Proposals due by 4 p.m. CST:	Friday, September 6, 2019
Candidate Selection to Demo/Interview:	September 9 to October 4, 2019
Park Board Recommendation/Award of Contract	Wednesday, October 9 th , 2019
Implementation/Testing/Training	October 14, 2019 to December 31, 2020
Software Implementation “Go Live”	January 1, 2020

Dates subject to change

4. Scope of Services

The project objective is to replace the current recreation management software in order to meet the current and future needs of the Marion Parks and Recreation Department. The City of Marion is interested in a standard, fully hosted, complete solution which can be customized to meet Marion's needs.

The ideal software solution will enable the City to provide excellent customer service both in-person and online for its main business activities including, but not limited to, recreation program administration and registration, facility scheduling and rentals, league management, memberships, payment processing and reporting.

Product Requirements

The selected software must provide all the following features for consideration:

Required Functionality

- **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.
- **Facility Reservations** – Ability to reserve a variety of facilities in-person and online.
- **Membership Management** – Ability to create a variety of memberships; sell memberships (seasonal/non-seasonal), punch cards, or key-fobs in-house or online; scan members in and out of facilities as well as set recurring member billing and streamline payment for departments and citizens.
- **Point of Sales** – Ability to sell merchandise and keep track of inventory. Must work with cash drawers, barcode readers, receipt printers and credit card readers with touch screen capabilities.
- **League/Team Management** – Ability to set-up registrations by team or individual, manage assessments, track game results, and auto-schedule games and tournaments with drag-and-drop adjustments.
- **Merchant Options/Credit Card Processing** – Ability to use a vendor-provided credit card processing gateway for facilities, activities and point of sale items. Or in the alternative, have the ability to integrate credit card processing.
- **Mobile Responsive** – The solution's interface is responsive to mobile devices such as tablets and phones without losing the functionality found on a desktop.
- **Reporting/Financial Accounting** – The solution will provide completely customizable reports that can be saved, emailed or exported. The reporting functions can easily be used for financial accounting needs.
- **Email/SMS Blasts** – The solution can automatically send out emails and SMS messages to registered participants.

Functionality Table

Below are the City's general requirements for the recreation services management software functionality. The requirements listed are classified as either "Essential" (E) or "Desirable" (D). When reviewing these items, indicate your software's ability to perform the functions outlined in

each table by placing an “X” in the appropriate column. The description for each column heading as follows:

FEATURE COLUMNS	
YES (Y)	Standard function of the software
PARTIAL (P)	The software provides some of the required functionality, but further modification or development is required. Provide details on which functions are standard and the scope with cost of any further modifications.
MODIFICATION (M)	Not a standard function of the software. Modification or development is required to provide this function. Provide details on the scope with cost to implement these modifications.
NO (N)	This function is not available. If there are other options, please provide further details.
Notes:	<ul style="list-style-type: none"> • If you cannot fit the comments or notes within the provided spaces, please attach them separately. • Please clearly identify comments by their corresponding section and title. • An (E) in front indicates a feature is essential • A (D) in front indicates a feature is desirable.

FEATURES	Y	P	M	N	Comments/Notes
General for the Entire System					
(E) System must operate under Windows.					
(E) System must maintain permission agreements for a period of three (3) years past participant’s 18 th birthday and a minimum of six (6) years after entry.					
(E) System must maintain all original records generated as a result of this software for a period of six (6) years after entry. Upon request, copies of those records shall be provided to the City at no cost.					
(E) Ability to prevent duplicate transactions and bookings.					
(E) Ability to automatically calculate and apply different fees based on resident/non-resident, age, status, late fees, and financial assistance.					
(E) Ability to search transactions, customer information, activity codes, etc.					
(E) Ability to export information such as reports into an Excel format or editable format.					
(E) Ability to provide rosters, schedules, and booking information to customers.					
(E) Flexible searching capacity for staff within the customer database.					
(E) User friendly registration system for both staff members and customers.					
(E) Ability to print waivers, permits and other fillable forms with the option for online waiver authorization via electronic signature.					
(E) Provide online cart for customers to view, edit, add, and delete transaction prior to checkout.					
(E) Web interface for customers and staff must be accessible on commonly used desktop and mobile devices, platforms, and screens.					
(D) Ability to integrate or mimic our park and recreation website design to appear seamless for online customers.					
Licensing					
(E) Ability to provide at least 6 individual/site licenses.					
(D) Ability to supply additional licenses.					
Point of Sale					
(E) Ability to take payments by cash, check, and credit card.					

(E) Ability to print, reprint, and/or email receipts.					
(E) Ability to attach the appropriate City's charge code to each transaction.					
(D) Ability to create a configurable interface to accommodate our different facilities (Swimming pool, Sports complex).					
(D) Ability to easily show payment amounts and accept payments for various types of programs.					
(E) Ability to track sales of concessions, shop merchandise, and rentals (i.e. equipment rentals).					
(D) Ability to integrate with membership, rentals, and inventory.					
(E) Ability to easily issue refunds.					
(D) Ability to customize reports created for this feature.					
(D) Ability to accurately track and record inventory (concessions).					
Customer Database					
(E) Ability to establish individual accounts for each user.					
(E) Ability to attach individual accounts to same house hold or family members (family pass).					
(D) Ability to attach account notes available only to the backend admins (ex. Do not accept checks, overdue payment, etc).					
(D) Ability to configure security levels for each individual account.					
(E) Ability to assign to each user various activities such as program registration, facility rental, online bill payment, etc.					
(E) Ability to lock customer access to account during administrative access for upgrades, changes, etc.					
(E) Security to prevent outside sources from accessing our data.					
(E) Vendor will not share customer information with third party vendors. <i>Select "YES" if you do not share information</i>					
(E) System must be user friendly for use both in house and online use.					
(E) Ability to provide a flexible search capability.					
(D) Ability for database to handle split family situations.					
(D) Ability to set alerts/suspensions on client accounts (i.e. overdue).					
Membership/Program Registration					
(D) Ability to facilitate and manage both in house and online membership sign-ups (permission agreements) and renewals based on residency.					
(D) Ability to allow participants check in throughout session/class.					
(E) Ability to see a member's age during check in.					
(E) Allow for online as well as in-person registration into one database.					
(E) Ability to make payments online.					
(E) Ability to internally generate refunds/credits.					
(E) Ability to organize and manage programs by seasons/years.					
(E) Ability to copy activity program information to future seasons/years.					
(E) Ability to print rosters and attendance lists and email rosters/schedules to instructors or coaches.					
(E) Ability to retain history of inactive activities in addition to enrollment information.					
(E) Ability to warn customers if registration criteria is not met such as permission/age/gender/address, or if the activity is full.					
(E) Ability for customers to browse activities and availability online.					
(E) Ability to pass transaction fees on to customer (if applicable).					
(E) Ability to show all fees associated with a transaction (i.e. program fees, transaction fees) itemized as separate fees.					

(E) Ability to create passes/punch cards/gift cards for programs.					
(E) Ability to apply optional course fees (ie: supplies/manuals/shirts).					
(E) Ability to prompt for additional course specific information.					
(E) Ability to make questions/information mandatory prior to completing the registration process.					
(D) Ability to assign officials and volunteers to programs/teams.					
(D) Ability to generate waitlist when applicable.					
(D) Ability to generate multiple program fees to accommodate "Early Bird" discounts or late registration fees.					
(D) Ability to customize reports created for this feature.					
Program Management					
(E) Ability to auto generate teams from a list of participants with built in parameters such as # of teams, # of kids, etc.					
(D) Ability to pair participants up from the same household, siblings, or stepsiblings and parent/volunteer coaches, special requests.					
(E) Ability to provide program reporting.					
(E) Ability to communicate to participants through email or text alerts.					
(E) Ability to build teams/classes based on selected criteria (i.e skill level, grade, gender).					
(E) Ability for coaches to pull information such as rosters, scheduling, and other needed information without having access to other park and recreation information.					
Facility Reservations					
(E) Allow for real time viewing of availability of facilities.					
(E) Ability to block times for facilities for special events or holidays, and so on.					
(E) Ability for customers to book/secure reservations online and print/email corresponding permits/contracts/etc.					
(E) Ability to schedule and handle reservations for multiple facilities such as baseball diamonds, meeting rooms, outdoor pavilions.					
(E) Ability to create a reservation calendar for facility rentals.					
(E) Ability to cancel and reschedule bookings.					
(E) Capability of preventing double booking for one facility.					
(E) Ability to record cancellation reasons.					
(E) Ability to limit reservations to 364 days in advance or shorter.					
(E) Ability to obtain and record a facility reservations name, number or email, facility rented, time, date, and reason for reservation.					
Scheduling					
(E) Ability to schedule over 100 facility users and 53 programs at numerous facilities (i.e. soccer, baseball, softball fields, basketball) and different facilities (i.e. soccer, baseball, softball fields, ice rinks, basketball, etc).					
(E) Ability to perform user friendly league scheduling for various leagues comprised of multiple teams/divisions/locations.					
(E) Allow for real time viewing of facility availability.					
(E) Ability to amend, cancel, and reschedule bookings.					
(E) Ability to generate multiple rental fees to accommodate residency, hourly rates, additional charges (i.e. field lights) and lump sum fees.					
(E) Ability to assign officials and volunteers to teams.					
(E) Ability to track facility renters who have completed rental agreement.					
(E) Ability to provide rosters, schedules, and booking information to customers.					
(E) Ability to generate an online schedule that is available for participants, organizations, and staff that is readily available and print for facilities.					

(E) Ability to capture and report event attendance.					
(D) Ability to apply user defined extra fees.					
(E) Ability to capture and report events by type.					
(E) Ability to manage repeat bookings on an individual as well as group basis.					
(D) Ability to rollover bookings from previous seasons/years.					
(D) Ability to customize reports created for this feature.					
Reporting					
(E) Ability to provide a standard set of reports with flexibility for customization as needed.					
(D) Ability for an overall reporting feature that provides a user the ability to pick the fields they want to appear on a report and customize grouping, sorting, etc.					
(D) Full access to all data at the table level.					
(D) Ability to export customized data lists in commonly accepted formats (i.e. Excel).					
Marketing/Communication					
(E) Ability to export contact information in order to market surveys, newsletter, announcements, etc. via email and regular mail.					
(E) Ability to export information in commonly accepted formats (i.e. Excel).					
(D) Ability to email/text all customers or by a subset by program, team, class, session, etc. (cancellation notices).					
(D) Ability to send cancellation notices via email/text blasts to participants from desktop or mobile device.					
(D) Ability to generate a catalog.					
(D) Ability to create marketing material that could be exported for import to digital signage.					
(E) Ability to link to City's website.					
(D) Ability to enter where a person heard about us and report on that information.					
(D) Ability to generate and integrate custom forms (waivers, contracts, lease agreements, permits, surveys, etc.).					
Financials					
(E) Ability to track all transactions using existing charge codes.					
(E) Ability to retrieve a minimum of six years' worth of financial information.					
(E) Ability to process credit card payments in a timely manner so that funds are received promptly into the City's bank account.					
(E) Ability to process credit card payments safely without a security breach.					
(E) PCI Compliant.					
(D) Ability to integrate with the City's financial software "New World".					
(E) Ability to print daily closeout summary/detail reports.					
(E) Ability to print, reprint and/or email receipts.					
(E) Ability to create, edit, and manage invoices.					
(E) Ability to manage checks.					
(E) Ability to accept the following methods of payment: cash, check, debit/credit card, use of account number, gift cards.					
(E) Ability to generate revenue reports.					
(E) Ability to allow for customer credits and/or refunds.					
(E) Ability to apply payment schedules and due dates.					
(D) Ability to manage third party billing.					
(E) Ability to receive partial payments and multi-tender payments.					
(D) Ability to manage accounts receivable.					
(E) Ability to override fees.					

(E) Ability to manage rental deposits.					
(E) Ability to link payments to transactions.					
(E) Ability to track transactions by user.					
(D) Ability to track individuals receiving a scholarship, including name, amount, and program.					
(E) Ability to manage year end revenue (i.e. payments made in January for the previous fiscal year shall apply to the previous fiscal year).					
(D) Ability to automatically generate billing with/when balances due.					
(E) Ability to automatically include past due amounts for all invoices when generating monthly billings.					
(E) Ability to automatically change rates in system for seasonal invoicing.					
(E) Ability to automatically update billing when payments are made.					
(E) Ability to export data in Excel spreadsheet format.					
(E) Ability to export data into other programs such as Tyler's New World, Excel, etc.					
(D) Ability to customize reports created for this feature.					
Maintenance (items to be included in the annual maintenance section as quoted in the price proposal)					
Dedicated website with product information and software release downloads.					
Version upgrades at no additional cost.					
Maintenance releases at no additional cost.					
Ability to limit or "lock out" system access during system maintenance.					
Training/Support					
Vendor has a dedicated website with product and training information and software release downloads.					
Ability to provide on-site training upon installation and subsequent training for new or substantially altered features.					
Access to current manuals describing the functional details and the correct operation of the software.					
Unlimited free technical support via phone or e-mail during CST business hours 7 a.m. – 4 p.m.					
Account representative to provide assistance with: <ul style="list-style-type: none"> • Monitor and report system usage • Upgrades to latest version releases • Resolution of software issues • Submitting enhancement requests 					

5. Proposal Format

The City of Marion will evaluate vendor experience, qualifications and capabilities for developing and implementing a new Marion Recreation Management System (RMS) The required qualifications are outlined below. Vendors must have at least five (5) years of experience delivering RMS solutions developed specifically for local governments. Responders are required to submit a written narrative corresponding to each of the underlined section items:

Executive Summary

- Overview and summary of how your company will assist the City of Marion in reaching the needs and goals of the Parks and Recreation department
- Any differentiators that set your solution apart from your competitors

Company Profile

- Company overview and history
 - How long has the company been in business?
 - Where are you located? (Will hours support 7 a.m. to 4 p.m. CST?)
 - Number of current employees?

- Do you plan on being around for 5 to 10 years? What is your succession plan if not?
- Capabilities of company - Why should your company be chosen?

Project Team

- Name, title, role (e.g., project management, training, design)
- Education, years of experience

Experience and References

- Please provide three (3) current municipality and/or other government entity customers involving similar professional services, consulting, and production deliverables. Include the contact name, address, telephone number, and email address for each reference.

Description of Recreation Management Software

- List all features, and functionality included in the proposed RMS. The proposed system must include all features and functionality listed in Scope of Services section of this RFP.
- Complete and answer in detail each item listed in the Functionality Table that is attached above.

Implementation Plan

- Average Timeline/Schedule
 - Example Project Plan
 - Data Migration
 - Integration
 - Training
 - System Testing
 - Transition to Production
- What role the City of Marion will play in the project

Support, Hosting and Security

- Support
 - Ongoing training opportunities (videos and training manuals, etc.)
 - Support services - emergency and non-emergency availability
 - Describe product release, enhancement and upgrade process
 - Support hours and model
- Security
 - Meets PCI compliance standards
 - Describe company's security process and hosting environment
 - What and where is the Data Center?
 - What is the back-up and Disaster Recovery model?
 - Describe in detail your Disaster Recovery and Redundancy policies and procedures
 - Provide information on archiving capabilities and processes.

Proposed Project Investment Estimate

- First Year development and implementation fees including:
 - Recreation Management Software
 - Days/hours of training, on-site or web-based
 - Indicate if travel is included or a separate cost for on-site training
 - Days/hours of Project Management
 - Days/hours of System Development/Data Migration
 - Merchant set-up
 - Additional products/functionality (included and optional)
- Annual fees for hosting, maintenance and support for Year 2 and beyond.
- Pricing must be lump sum and all-inclusive except for optional enhancements, if available.

Additional Products Offered (limited to five (5) pages)

- Give brief descriptions of other products offered by the company. Do not include marketing brochures, promotional collateral or excessive non-relevant information.

6. Submittal Requirements

The deadline for RFP responses is Friday, September 6, 2019 no later than 4 p.m. CST.

Submit one, electronic file (.pdf file preferred) via email to: sstaashelm@cityofmarion.org. Indicate in the subject line "City of Marion Recreation Management Software – [Vendor Name]". The City of Marion will only accept attachments up to 10MB.

Alternative Submittal: Submit one (1) hardcopy of response. Sealed proposals must be clearly marked on the outside of the envelope with the following description: "City of Marion Recreation Management Software– [Vendor Name]". Proposals shall be mailed to:

Seth Staashelm
Deputy Director of Parks and Recreation
City of Marion
343 Marion Blvd.
Marion, IA 52302

Submittals not received on or before the specified deadline stated above will not be accepted (no exceptions). The City of Marion reserves the right to request follow-up information or clarification from vendors in consideration. Vendor is responsible to ensure delivery by the date and time included.

The City of Marion reserves the right to reject any or all submittals, to compare the relative merits of the respective responses, and to choose a vendor, which will best serve the interests of Marion.

Each response to this RFP shall be done at the sole cost and expense of each proposing vendor and with the express understanding that no claims against the City of Marion for reimbursement will be accepted.

7. Evaluation Criteria

Responses to this RFP will help the City of Marion identify the most qualified vendor and will be indicative of the level of the firm's commitment. The City will evaluate the qualifications, references, overall fit with the City of Marion, as well as take into consideration the proposed scope and pricing submitted to determine the most qualified vendor.

8. Selection Process

The selection process will involve the following phases:

Phase 1: A committee selected by the City of Marion will evaluate vendor submittals. The initial review will determine conformance to submission requirements and whether responses meet minimum criteria established. Review will include the vendor's acceptance of RFP terms and completeness of submissions.

Phase 2: Interview of most qualified applicants/Request a demo of their software program.

Phase 3: Committee team will check references given.

Phase 4: The City of Marion will enter into negotiations leading to a professional services agreement.