December 21, 2018

CHARTER TOWNSHIP OF SHELBY
REQUEST FOR PROPOSAL 18-52
TOWNSHIP WEBSITE REDESIGN, CONSOLIDATION

The Charter Township of Shelby is soliciting proposals from experienced and qualified firms for a redesign of the Township website, www.shelbytwp.org, and a consolidation of online tools such as the Township's legislative agenda management process, stream and archive video content for Township meetings, online applicant management, and its web-based recreation management software. Sealed proposals will be received by the Charter Township of Shelby at the Clerk's Office, 52700 Van Dyke Ave., Shelby Township, MI 48316 until ***2 P.M. LOCAL TIME, TUESDAY, MARCH 5, 2019***, at which time the names of submitting proposers will be publicly read.

The Charter Township of Shelby officially distributes solicitation documents from the Clerk's Office, www.shelbytwp.org or through the Michigan Intergovermnental Trade Network (MITN). Copies of solicitation documents obtained from any other source are not considered official copies. Only those vendors who obtain solicitation documents from either the Clerk's Office, www.shelbytwp.org or the MITN System are guaranteed access to receive addendum information, if such information is issued.

THE CHARTER TOWNSHIP OF SHELBY RESERVES THE RIGHT TO REJECT ANY AND ALL PROPOSALS FOR ANY REASON IT CHOOSES AT ITS SOLE DISCRETION. Any deviation from the scope of work or terms and conditions must be noted in the proposal.

Please submit proposal on or before the date and time given above to:

Stanley Grot
Shelby Township Clerk
52700 Van Dyke Ave.
Shelby Township, Michigan 48316

All proposals (7 copies) must be submitted in a Sealed Envelope marked "RFP – TOWNSHIP WEBSITE REDESIGN, CONSOLIDATION." SUBMISSIONS MUST BE IN HARDCOPY FORMAT.

TOWNSHIP WEBSITE REDESIGN, CONSOLIDATION RFP
ATTENTION TOWNSHIP CLERK
CHARTER TOWNSHIP OF SHELBY
52700 VAN DYKE AVE.
SHELBY TOWNSHIP, MI 48316

RFPs ARE DUE ON OR BEFORE 2 PM, TUESDAY, MARCH 5, 2019. RFPs RECEIVED AFTER THIS TIME AND DATE WILL BE REJECTED. INTERESTED PARTIES MAY SUBMIT PROPOSALS ON ONE OR MORE SECTIONS.

Name of Company: ____

Street Address: ____

Township/Township: ________________________ Zip Code: ________

Contact Name: ____

Telephone No: __________________ E-mail Address:____________________

Number of Years in Business ______________

Samples of Similar Work Attached: ___Yes ____No
Reference Names Submitted: ___Yes ____ No

General Specifications:
The Charter Township of Shelby is soliciting proposals for a redesign and consolidation of online tools such as the Township's content management system, legislative agenda management process, stream and archive video content for Township meetings, online applicant management, and its web-based recreation management software that closely meets its current requirements and is capable of expansion to meet future needs.

Currently, the Township utilizes separate vendors for website hosting and content management system, its legislative agenda management process, streaming and archiving video content for Township meetings, its online applicant management, and its web-based recreation management software. The Township is seeking one vendor to encompass all or multiple facets of these functions to accommodate a more streamlined relationship for its service requests and a possible cost savings through economies of scale.

For a comprehensive review of the Township's current requirements visit www.shelbytwp.org, and navigate to pages such as http://shelbytownmi.iqm2.com/Citizens/Default.aspx, www.shelbytwp.org/jobs and www.shelbytwp.org/departments/prm/web_trac.html

Additional Requirements:

- Vendor must supply the contact names, addresses and telephone numbers of three (3) references who have been clients for three (3) or more consecutive years.

- PERFORMANCE GUARANTEE: All work performed by the vendor is subject to a performance guarantee whereby a penalty of 10 PERCENT will be subtracted from the final billing if the vendor fails to deliver the final product per an agreed upon production schedule between the Township and the vendor.

For additional information contact Brad D. Bates, Community Relations Director, at 586-726-1994 or bbates@shelbywp.org.

Interested parties may submit a proposal on a single section, proposals on two sections, proposals on three or a four-section package proposal.

Pricing for Section #1: Web site redesign, content management & hosting

The www.shelbytwp.org website is the primary communications tool for the Township and is used to provide comprehensive resources and services to inform a diverse user base of residents, businesses, visitors, and staff about Township services, happenings, and various other information. This can include service-oriented objectives such as applying for construction permits and registering for Township programs. Additionally, users frequently visit the site for accessing information about events, news, Township recreational facilities and offerings, as well as to find out about Township Board and Planning Commission meetings. The website supports all Township departments with numerous live pages.

To prepare for a new CMS the Township conducted an internal audit of the current site, the results of which will inform the implementation of the migrated site. Migrating to a new CMS additionally allows the Township the opportunity to refresh architecture and design.

The primary scope of this project is to implement a software-as-a-service (SaaS) Content Management System (CMS) for the management of the www.shelbytwp.org website. This includes:

- Delivering a flexible and scalable CMS supporting the creation, management, and publishing of website content inclusive of services for the designated Township users.
- Providing content analysis, planning, and assistance with migration to a new framework.
- Creating a site that is responsive, mobile-friendly, and designed in accordance with the Township's graphic guidelines.

The overall scope for this project is based on the following assumptions and constraints:

- **Assumptions**
  - The Contractor will provide an experienced Project Manager who will create a detailed project plan and schedule in conjunction with the Township's Project Manager(s).
  - The Contractor will provide guidance to ensure the configurations made to the CMS follow best practices and will not compromise the stability and future upgrades of the system.
  - The functionality of the System shall be in accordance with the specifications and conditions contained within the RFP.
  - The ideal Contractor will be a partner involved in all aspects of requirements clarification, project planning, solution design, implementation, content migration, deployment, training, and on-going maintenance.
- **Constraints**
  - The Township desires to have project kick-off within thirty (30) days of contract signing.
  - Some of the current content and functionality are not currently designed to be responsive and thus require further analysis and potential redesign.
  - The solution must adhere to all applicable Township policies and procedures.

The Contractor must be responsible for requirements clarification, project planning, solution design, implementation, deployment training, and on-going maintenance phases of the project in collaboration with the Township to ensure a successful implementation. Each stage of the project will require approval from the Township before moving on to the next stage. The stages and milestones must be defined jointly between the Contractor and the Township, as part of project planning activities. The Project must be tracked using project tracking software, in a format acceptable to the Township.

The schedule of work will be provided by the Contractor in the form of a project plan and will be coordinated with the Township's Project Manager(s). The Contractor will conduct status meetings at an interval to be determined during or shortly after project kickoff. If deemed appropriate between the Contractor and the Township, the Contractor may be required to conduct on-site meetings throughout the project lifecycle at the following location: 52700 Van Dyke Ave., Shelby Township, MI 48316.

The Contractor shall perform the majority of the work remotely and through remote screen sharing sessions with the Township's IT staff, if applicable, the Township Project Manager(s) and the Community Relations Department.

Either the Contractor or the Township may initiate a Scope Change Request when some change or event has occurred that may impact the scope of the project. The scope change request initiator will prepare a formal document that includes description and benefits of the change. The Contractor will estimate the effort and provide the Township with the schedule and budget impacts for review. The Township then may opt to approve or decline a change request based on the time and material estimates provided by Contractor. The Contractor will not proceed with work related to the change request until the Township has issued a formal approval.

The following items are required deliverables from the Contractor for the project.

Item	Description
Project plan and schedule	The schedule of work will be provided by the Contractor in the form of a project plan and will be coordinated with the Township's Project Manager(s).
Progress Reports	The Contractor will provide weekly project progress reports throughout the project initiation period. Progress reports and associated templates shall be first submitted and reviewed for adequacy by the Township's Project Manager(s).
Baseline System configuration document	The Contractor will provide a document that captures all baseline configurations that have been implemented in the CMS for this project.
Site map	The Contractor will provide a documented end-state site map for www.shelbytwp.org and its microsites.
Sample training plan and materials	The Contractor is responsible for providing training prior to deployment and well as provide training materials for use post-deployment. A sample training program must be included with the Contractor's proposal.
Administration guide	The Contractor will provide an Administrative user guide.
Troubleshooting Guide	The Contractor will provide a troubleshooting guide for the Township's System administrators to leverage for troubleshooting issues encountered with the System.

Vendor shall submit a price quote detailing all of the costs involved in the provision of this product including, but not necessarily limited to the items listed below.

The items below describe the Charter Township of Shelby's solution requirements for the proposed solution. Please use the following values to self-rate your solution to each requirement (see Vendor Self-Rating column).

Rating	Self-Rate Standard
4	Requirement is standard feature or service in the proposed solution and can be demonstrated by the vendor.
3	Feature is not currently included but will be available in a future release. Please indicate release date or time frame (e.g., mm/yyyy or in 'nn' months).
1	Feature is provided by a third party partnering arrangement. Indicate any preferred partner agreements.
0	Requirement cannot be met.

Search	Vendor self-rating	Vendor response
The System must allow for robust search on the site that is not reliant on an external service or appliance.		
The System must allow for segmented search functionality such that specific areas of content can be searched based on user selection. A specific example includes the ability to search separately within the Township municipal code section of content. Search must also include the ability to filter results by date, medium, break out, add as preferred		

Performance	Vendor self-rating	Vendor response
The System should provide fast search and page load performance of no more than 2-3s.		

Calendar	Vendor self-rating	Vendor response
The System must provide a calendaring system to allow for the creation of events, meetings, performances, etc. that can be categorized, sorted, and filtered. To include the ability to repurpose calendar events and display them in other areas of the site.		
The System must allow for the creation of calendars specific to Township programs that are separate from the primary Township calendar.		

Formatting	Vendor self-rating	Vendor response
The System must provide rich text WYSIWYG tools for creating and editing content.		

Responsive Design	Vendor self-rating	Vendor response
The System must allow for responsive design for the delivery of all pages that are optimized for desktop, tablet, and mobile.		

Forms	Vendor self-rating	Vendor response
The System must allow for the creation of online forms for website users to fill out and submit. Forms features must include but not be limited to: • Allowing for multi-page forms • Ability to duplicate forms • Ability to send notifications to one or more Township staff when website users submit a form • Ability to design the forms such that they match Shelby Township branding/styles. • Provide reporting and metrics on form submissions • Meet all of the Township's security policies • Ability to use branching logic • Ability for data encryption and secure data deletion after data retention period		

Records Retention	Vendor self-rating	Vendor response
The System must help users meet the Township's records retention policies for all content types to include the ability to display metrics showing content age and type.		

Integration	Vendor self-rating	Vendor response
The System must allow the ability to generate and consume RSS feeds.		

Notifications	Vendor self-rating	Vendor response
The System must allow the ability to activate and deactivate public-facing alerts site-wide or on specific pieces of content.		
The System should provide the ability to allow site visitors to subscribe and unsubscribe to receive notifications to content updates.		
The System should allow for the ability to configure notification options for when new pages are created.		
The System should provide the ability to set reminders on pages that send a notification to page authors such as reminders to update content.		

Hosting	Vendor self-rating	Vendor response
The System must be hosted in the cloud with a multi-tenant solution, and hosted by the Contractor or a Contractor partner. Hosting environment and solution need to meet all applicable compliance and provide ongoing compliance reports (SSAE-16 or similar).		

User Permissions	Vendor self-rating	Vendor response
The System must provide the ability for the setting of permissions, allowing content managers various levels to access, modify, or administer the site.		

Content Management	Vendor self-rating	Vendor response
The System must allow for the possibility of enabling a content approval process.		
The System must provide preview capabilities for viewing edited content before publishing. To include the ability to preview what the results will look like on various mobile devices as well as share the preview with people outside of the system.		
The System should allow for content sharing and repurposing of the same content item in multiple pages, templates, or microsites, referencing back to the primary source. An example of this is Township demographic figures.		
The System must allow for all content items to be published, expired, and archived at a specific date and time. This applies to whole pages or elements on a page.		
The System must provide check-in and check-out capabilities for content, pages, and digital assets.		
The System must allow for the secure sending of deleted content to a recycle bin and allow for content recovery.		
The System must allow for the ability to archive content without deleting it. To include ability for setting a time limit for when archived content expires and then gets deleted.		
The System must allow for the ability to copy and paste any content for repurposing including containers, formatting, pages, and folders.		
The System must provide the ability to access, manage, and restore from versions.		

Link Management	Vendor self-rating	Vendor response
The System should allow content managers to view what links are being used on the pages they are managing. This is to allow content editors to understand impacts of changes to their pages.		
The System should show when other pages are linked to the page being deleted edited to avoid dead links.		

The System must allow the ability to create custom URLS and the ability to create redirects that are compatible with Google Analytics to track URL-specific marketing campaigns.		

Look and Feel	Vendor self-rating	Vendor response
The System must provide the ability to incorporate custom scripts, CSS and markup within pages and templates.		

Templates	Vendor self-rating	Vendor response
The System must allow the administrative ability to restrict adding styles that could break compliance with brand and style guidelines.		
The System must allow the ability to provide predefined templates for pages.		
The System must provide the ability to manage templates and add and modify elements, such as logos or navigation elements, using drag-and-drop. Permissions should manage who can modify these templates or design elements.		

Search Engine Optimization	Vendor self-rating	Vendor response
The System must allow content managers to assign unique, relevant title, description, and keyword meta tags to content. These tags must be able to be set as a required field.		

Information Architecture	Vendor self-rating	Vendor response
The System must allow the ability to exclude pages from the navigation.		
The System must allow the ability to change the order in which items appear in navigation.		
The System must allow for navigating to at least three menu levels.		
The System must provide support for common navigation types such as horizontal, vertical and dropdown menus.		
The System must allow the ability to assign categories to different content elements.		

ADA Compliance	Vendor self-rating	Vendor response
The System must allow for configuration of the site to meet ADA compliance standards WCGA 2.0. To include the ability to require authors to use relevant tags, content, etc. to help ensure ADA compliance		

Integrations	Vendor self-rating	Vendor response
The System must allow for custom scripting including JavaScript or embedding of third party applications such as ArcGIS, Google Maps, social media, and internal applications. Map example: http://shelbygis.maps.arcgis.com/home/index.html		
The System must allow for single sign-on integration with Active Directory using common SSO protocols.		

Security	Vendor self-rating	Vendor response
The System needs to be configured using security best practices, such as least privilege and CIS benchmarks.		
Solution needs to have ability to encrypt personal and sensitive data in transit and at rest.		
Solution needs to have a secure architecture and appropriate access controls in place to protect data. For multi-tenant environment, proper tenant isolation is required.		

Solution needs to have processes in place to identify unauthorized access or potential data compromise and timely alert impacted customer. Incident response plan needs to be in place and tested at least annually.		
System needs to undergo regular vulnerability scans and timely address issues.		
Solution needs to undergo penetration test at least annually and after significant change and share results with the customers.		

Media Management	Vendor self-rating	Vendor response
The System must allow for direct media asset uploads during the creation and editing of content, and not require these assets to be uploaded to a media library first.		
The System should allow for image optimization upon upload. If this option is not available, the Contractor must provide specifications such as image dimensions and resolution for optimized images.		

Analytics	Vendor self-rating	Vendor response
The System should include a robust analytics package and include capabilities such as: • Analyzing website traffic • Providing embedded analytics in the user dashboard • Ability to track and report on site use and demographics • Page view activity • Conversion rates • Internal audit logs		

Technical Requirements	Vendor self-rating	Vendor response
The System data must be backed up and restorable. Recovery time objective is within one business day. Recovery Point objective is within 15 minutes of all committed transactions. Backup schedule, retention schedule, and retention location information must be provided by the Contractor.		
The System must maintain an uptime percentage of 99.9%.		
The System must allow for API integration.		

Microsites	Vendor self-rating	Vendor response
The System must allow for the creation and transfer of existing microsites. Examples: • Sidewalk Committee: https://shelbytwp.info/ • Historical Committee: http://www.shelbyhistory.com/		

Support	Vendor self-rating	Vendor response
The Contractor must provide staff availability post-deployment for one week to more immediately address any issues that arise. After this, the SLAs stated in the "Support Priority Chart." (see below)		
It is preferred that the Contractor have an authorized support center staffed with technicians certified in the System. The center must be accessible during normal business hours (8 a.m. – 5 p.m., M-F E.T., and according to the days the Township is open for business) to respond to a verbal notification that support work is required.		
It is preferred that the Contractor provide 24 x 7 online access to Support information.		

It is preferred that the Contractor provide an email service for requesting support.		
It is preferred that the Contractor provide an online ticketing system for requesting support.		

Support Priority Chart

Priority	Response Time	Resolution Time	Priority Definition
1 - High	1 hr	2 hrs	A problem has occurred where the system is down; or a substantial portion of the site data is missing and no workaround is immediately available. This support should be available regardless of Holidays.
2 - Med	8 business hrs	3 business days	A problem has occurred where major functionality is severely impaired. The customer's operations can continue in a restricted fashion, although long-term productivity might be adversely affected.
3 - Low	24 business hrs	10 business days	A problem has occurred that has a limited adverse effect on the customer's business operations or a minor condition or error that has no significant effect on the customer's operations.
4 – New Feature	24 business hrs	TBD based on request	A suggestion for new features or an enhancement regarding the System.

Training	**Vendor self-rating**	**Vendor response**
The Contractor must provide training to the Township's administrative users of the System as well as provide training documentation.		

Maintenance and upgrades	**Vendor self-rating**	**Vendor response**
The System must have regularly performed maintenance and upgrades. The Contractor must provide regular maintenance and upgrades schedule outlining regular expected maintenance, downtime, and upgrades. Ideally the Contractor will share roadmap plans.		
The Contractor must use a documented change management process that includes formal testing when developing and implementing new features and functionality. This process must include customer notification procedures.		

Comments/Considerations: ____

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Year: **2019 (implementation)** **2020** **2021**

$________ $ ________ $ ________

Pricing for Section #2: Legislative agenda management process, stream and archive video content for Township meetings

Vendor shall submit a price quote detailing all of the costs involved in the provision of this product including, but not necessarily limited to the items listed below.

The items below describe the Charter Township of Shelby's solution requirements for the proposed solution. Please use the following values to self-rate your solution to each requirement (see Vendor Self-Rating column).

Rating	Self-Rate Standard
4	Requirement is standard feature or service in the proposed solution and can be demonstrated by the vendor.
3	Feature is not currently included but will be available in a future release. Please indicate release date or time frame (e.g., mm/yyyy or in 'nn' months).
1	Feature is provided by a third party partnering arrangement. Indicate any preferred partner agreements.
0	Requirement cannot be met.

Agenda Automation General Requirements	Vendor self-rating	Vendor response
Generate legislative agendas that are customizable for multiple boards. There are other agencies that we expect to use this solution long term. Examples include Planning Commission and Zoning Board of Appeals. Additionally, it is desired that we would be able to setup one-time events.		
Provides for automatic routing of agenda items through workflow. The current Township standard for document archival/retrieval is Laserfische and New World Systems for financial management. Given the substantial financial and human capital investment in these two platforms, we have a strong desire to continue use of Laserfiche and New World Systems, if at all possible.		
Interfaces for any of the above?		
Integrated e-signatures and initials at each stage of review and final approval.		
Sufficient data storage to compile, store and track items for ease of archival and retrieval. Fully searchable legislative database. Current video, audio, and text content is approximately 500 GB. The latest video configuration captures hi-res content and we are consuming about 800 GB per year.		
The solution will allow Shelby Township to include the hosted material (video, audio, text) as a frame within the Township website (www.shelbytwp.org). Our public facing webpage with links to our video archive is: http://shelbytownmi.iqm2.com/Citizens/Default.aspx		
Configurable document templates and field descriptors.		
Microsoft Office integration to create items and easily import files, charts, and graphs as supporting documents. Ability to insert items as function of Agenda creation but also after hearing complete and edited version added or replacing existing items.		
Ability for Township trustees to make personal notes on individual agenda items and to be able to collaborate on supporting documents.		
Agenda generation allows for last-minute changes by agenda administrators. The expectation is that there will be a set of about 50+/-		

Township "requestors" that can submit agenda items up to 1 week before a scheduled event. This will result in "draft" agenda that will be published. In certain cases, agenda items could change up until 24 hours prior to the event when a "final" agenda is created and published. There still could be last minute changes and system administrators (only) would be able make these.		
Concurrent or sequential approval for review of agenda items.		
Auto populates fields and spellcheck.		
Provides web-based access from standard web browsers (i.e. Internet Explorer 9.0 or higher.) Must support all key web browsers such as Chrome, Safari, MS Internet Explorer, Edge, Firefox, including mobile devices at the current version and two versions back at the time of deployment.		
Shelby Township branded web portal.		

• **Internal User Functionality**	**Vendor self-rating**	**Vendor response**
○ Provides requestors the ability to submit agenda items. We envision a tiered user configuration with (a) the public viewing live streaming and accessing the agenda archive, (b) board members participating in meetings, (c) 50+/- agenda item requestors, (d) 6-8 application users - actually running A/V capture for a given meeting (e) 1-2 application administrators.		
○ Ability for the requestor to submit attachments at initiation.		
○ Ability for requestor to attach additional documents subsequent to initiation to add a file or other supporting document.		
○ Allows requestors to delete requests from draft agendas before established cutoff dates.		
○ Provide a dashboard to examine status of agenda items as agendas are being created. For example, anyone submitting a request for adding an agenda item could see where their request was in the process.		
○ Intuitive graphic user interface (i.e., front-end consumer friendly display)		
○ Requestors can receive a confirmation that requested item has been added to the final agenda.		
○ Capability for system administrators to create custom fields and searchable metatags.		
○ Ability to upload documents without size limitations.		
○ Ability for originators to assign one or multiple departments. This is mainly for notification and meeting inclusion. A grant submittal, for example, may be an agenda item and the grant spans multiple departments. The desire would be for there to be a way to indicate this and include all involved as part of the process.		

• **Analytics**	**Vendor self-rating**	**Vendor response**
○ Capability to generate both standard ("canned") and ad-hoc (custom) reports as well as ability to move data to Microsoft Office and Adobe-based products.		
○ Ability to search by fields in document request form.		
○ Capability to generate reporting on requestors, number of		

requests in total by requestor, department, division, total number of attachments, and the like.		

• **Systems Operations, Support and Maintenance**	**Vendor self-rating**	**Vendor response**
○ Provide the ability to monitor health of systems and processes and functionality. It is expected that we would have a real-time indicator that video streaming is active during a given meeting. Similarly, we'd expect some indication that video archiving is occurring and that the internet is active.		
○ Provides date/time-stamped audit trail of all actions.		
○ Provides methods to retrieve, query, and report against archived data.		
○ System upgrades (troubleshoot, upgrades, patches, etc.) provided on a timely basis with appropriate release notes and notifications. Provider allows for alerting of system downtime and maintenance.		
○ Describe the timing and delivery of system administration manuals and how you keep documentation up-to-date.		
○ How many support centers do you have and where are they located.		
○ Are onsite or live online trainings available? Provide costs for each option.		
○ Availability of train-the-trainer sessions for system administrators.		
○ Availability of ongoing online training for front end users such as online access to video tutorials and best practice guides with index search capabilities.		
○ System maintenance can be performed with minimal disruption in productivity. Please explain your process for patching, upgrades and any new releases of your platform. Do you provide a development environment where we can test impact to our operation, publish any process changes, conduct limited user training, etc. prior to pushing new code to production servers? We expect a detailed release plan so that we can properly prepare for any potential user impact. Do we have the option to refuse any given release?		

• **System Administration and Performance**	**Vendor self-rating**	**Vendor response**
○ Provides full system administration functionality (i.e. establishment of user profiles and access) and ability to have role based system administration.		
○ Provides Clerk's Office staff with super user account.		
○ Supports de-activation and re-activation of user accounts and roles.		
○ Allows Clerk's Office staff to view audit logs for all requests, changes, deletions, and additions.		
○ Supports concurrent user access for a minimum of 50 users (i.e. requestors) with the ability to scale. Please explain your licensing model as it relates to user administration: We would have an unlimited number of potential public viewers of agenda video and artifacts, a varying number of board meeting participants, about 30 agenda item submitters, 8 application users conducting meetings and 2 system		

administrators (see B1.) Are "seats" licensed in the SaaS model? If so, are the seats concurrent or named.		

• **Software as a Service Solution (SaaS)**	**Vendor self-rating**	**Vendor response**
○ Please explain your method for ensuring user satisfaction. What are your customer satisfaction and retention rates?		
○ If data centers are physically secured, explain the method/technology used.		
○ Please detail data center and security certifications held by your company, specifically certification title, description, issuing organization, frequency of renewal, most recent issue date of the certification. What, if any, compliance certificates does your hosting environment have (HIPPA and CJIS, for example)?		
○ Has your company experienced any breach in data center, network, database, and/or application security in the past three years? If yes, please describe each incident date, nature of incident, vendor's response, customer communication and result.		
○ Describe your process and procedures for segregating customer data at rest.		
○ How would our data be compartmentalized from other tenant clients?		
○ What change management processes are implemented to protect Shelby Township data and system availability?		
○ What configuration management processes are implemented to protect Shelby Township data and system availability?		
○ Please describe your internal and external audit processes related to data security and operational integrity? What do you allow for in terms of the Township conducting up to annual audits?		
○ In addition to user IDs and passwords, describe the standards you use and other methods you use to authenticate users, e.g. Active Directory, certificates and tokens. Do you support single sign-on? Are strong passwords required?		
○ Describe your procedures for providing your customers advance notification of major upgrades or system changes.		

• **Software Release Process**	**Vendor self-rating**	**Vendor response**
○ What is your frequency and process for new software upgrades / releases, e.g. planning, scheduling. Notification, distribution/ implementation? What latitude do your customers have regarding adoption of the upgrades or changes?		
○ Please provide a summary timeline of software releases and upgrades for the past three years, i.e. month, date, release or upgrade indicator and summary description of the change. When/How are release notes delivered? What is our test and process documentation change window? Do we have user acceptance rights?		
○ Describe how software patches, upgrades and major releases are distributed to your customers for any non-browser client installation, e.g. auto-upgrade at log-in,		

Microsoft Software Installer, etc. Please explain any potential thin/thick client applications, if applicable. We have a strong preference for the agenda automation and public viewer to be purely web based. It is understood that there will likely be a local application for managing video, audio and agenda document tagging.		
○ What is your expected software release schedule for the next two years – Frequency/ dates and content?		
○ What software upgrades are not included in the maintenance costs? What are the time and costs to Shelby Township for implementing those upgrades?		

• **User Functionality**	**Vendor self-rating**	**Vendor response**
○ Ability for easy viewing of video archives and live viewing (web stream) across: (a) Operating Systems (Windows and Mac OS), (b) browsers (Chrome, Safari, Firefox, Edge, IE, etc.), and (c) mobile devices (Apple /iOS, Google/android.)		
○ Ability to send out a bookmarked link that goes directly to a specific document or a particular spot in a video.		
○ Provide for easy/intuitive use for the end consumer and for back-end operators.		
○ Ability to run optimally on desktops/laptops and mobile devices.		
○ System should be quick and agile and be adaptive to new technology and changes in the way people consume/access information.		
○ Capability to download a video from the back-end of the system by administrative users as there may be times we want to use raw footage.		
○ Front-end/customer friendly interface.		
○ Ability to separate meeting/agenda categories. Please explain how we could categorize meetings by agency and/or topic. Ideally there would be a way to slice out different content collections for different publishing needs. For example, can a user filter out all content to just see Board of Trustees meetings? Could our Planning and Zoning Department, for example, publish a framed window of just their meeting archives? Please explain your content filtering and potential "sub-portal" possibilities.		

• **Web Streaming Solution General Requirements**	**Vendor self-rating**	**Vendor response**
○ System allows for local encoding computer to accept an HD-SDI feed with embedded audio.		
○ Ability to serve live and archived audio and video to the public at 1080i resolution or higher.		
○ Archived minutes containing links to specific points in time of the recorded video.		
○ Provide business and after hours technical phone support to		

	Township staff operating system during day and night meetings. Please provide your service level agreement, escalation processes and any support portal details.		
	○ Local storage of archived audio/video media in a common non-proprietary video format, in addition to vendor’s cloud storage. In other words, we expect automated real-time port of video to local storage. Our expectation is that this would be the fallback in the event of internet outage. We will need verification that we can continue conducting any hearing with uninterrupted A/V capture despite the health of the internet.		
	○ Provide estimate of cost to convert existing video/audio archives with their linked, time-stamped HTML meeting minutes. Current estimate is a need to convert about 500GB of video, audio and data. Please provide details on how this could be accomplished (via templates, for example) in addition to cost/time associated for you to perform the conversion. This archival conversion is not required for go live and we may opt to convert with internal resources. Still, we need to know if/how this could be accommodated. The existing archive can be seen at http://shelbytownmi.iqm2.com/Citizens/Default.aspx		

• **Not required but features desired**	**Vendor self-rating**	**Vendor response**
○ Capability to incorporate graphics (e.g. Shelby Township logo) onto templates		
○ Ability to send reminders to speakers due to present on items for discussion.		
○ Mobile/tablet version of website to allow easy access and use of site; automatic recognition and redirect to mobile/tablet version.		
○ Describe your Boards & Commissions module for recruiting, on-boarding, reporting and managing board members, if applicable. Please provide pricing structure.		
○ Please explain any features, capabilities and integration your application supports for social media information sharing.		
○ Please explain how we may be able to view certain items (notes or attachments) internally without necessarily displaying them to the public. We are obligated to provide access/delivery of any "work product" for open records and freedom of information requests.		
○ Please explain possible video capture for hearings held remotely.		
○ Allow potential hearing attendees to be able to simply add certain meetings to their Microsoft Outlook calendar.		
○ Please explain your civic engagement module, if available. We are interested in a PC/hosted application to allow for public speakers to request time to speak at given hearings. The software would slot speakers, display their speaking order and display countdown timer.		

Comments/Considerations: ____

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Year:	**2019 (implementation)**	**2020**	**2021**
	$________	$ ________	$ ________

Pricing for Section #3: online applicant management:

The Shelby Township Human Resources Department currently utilizes various methods to manage transactions and work flow including applicant tracking, job descriptions, evaluation forms, grievance tracking, payroll transactions, candidate list creation, etc. Shelby Township currently has approximately 750 full-time, part-time, and seasonal employees. There are four full-time employees in the Human Resources Department.

The Shelby Township Human Resources Department is seeking an integrated solution from a single vendor. By definition, an integrated software package (or solution) requires the entire application to be developed and maintained by the successful vendor. The vendor response shall clearly describe how they can best satisfy the Human Resources Department's requirements. Responding to this RFP requires a comprehensive solution from vendors with legal and financial responsibility for all software, implementation, training, project management, support, and ongoing maintenance services.

The following list is meant to give you an idea of what Shelby Township is interested in. It is not meant to be all-inclusive or exhaustive nor are all items meant to be requirements. Items may be added or deleted.

- **Service**
  - Software-as-a-Service model is acceptable.
  - Unlimited data capacity at no additional charge.
  - Data retained indefinitely.
  - Unlimited users at no additional charge.
  - Solution matches the Township's website graphics, logo, colors, aesthetics, etc., with no corporate branding from the vendor.
  - Stand-alone database for the Township to allow field name and site changes.
  - Stand-alone database for the Township to prevent co-mingling of data with vendor's other customers.
  - Allow end-users to utilize web links, hyperlinks, RSS feeds, and social media without customization.
  - The Township owns all stored data and may have access to it at any time.
  - Automated process for downloading and uploading data from current HTE software.
  - Ability to integrate easily with other Township software currently used.
  - Ability to integrate easily with Employee benefits portal (HRConnections).

- **Usage**
  - Completely configurable workflow on all processes including approval, notification, routing processes, etc., regardless of variation among position types or user groups.
  - Unlimited number of workflow and system changes, including changes to site graphics, forms, etc. at no additional charge.
  - Utilization and storage of unlimited number of unique forms (i.e. applications and supplemental forms, etc.) at no additional charge.
  - Library of supplemental questions that can be categorized and are searchable by key word.
  - Supplemental question item analysis.
  - Ability to add additional supplemental questions or categories online.
  - Ability to determine and change which positions supplemental questions are attached to.
  - Unlimited number of supplemental question categories.
  - Ability to create and modify forms in the user interface without vendor involvement.
  - Ability to create and modify an unlimited number of user groups, each specially named and labeled according to Township specifications.
  - Ability for individual users to modify display options in the user interface, including the ability to add display columns, re-order columns, and customize view settings.
  - Ability to create and modify organizational charts online or within the software without vendor involvement.
  - Ability to create and store an unlimited number of applicant or posting document types that can be quickly and easily created in the user interface.
  - Ability to store document attachments independent of one another for individual access.
  - File size limits for documents.

- E-mail templates that include the ability for the Township to determine the From, To, CC, BCC, and Subject lines.
- E-mails and e-mail templates can be created by the Township and allow the ability to include mail merges, web links, graphics, images, formatting, etc.
- Ability to determine automated triggers to initiate system actions. For example, when a requisition enters a certain status, a certain notification gets sent to multiple people.
- Ability to create guest user accounts for unique circumstances and limit access as well as set an expiration date or time.
- Ability to modify user and group permissions with no vendor involvement.
- The system includes a built in reporting tool that produces standard reports.
- The built in reporting tool allows a user, even without any technical expertise, to create unique ad hoc reports.
- The built in reporting tool has no limit to the number of unique ad hoc reports that can be created.
- Ability to capture and store dates a requisition has been approved for each of the necessary levels of approval.

- **Applicant Tracking**
  - System allows unique approval and workflow processes for each posting or position.
  - Ability to create posting requisitions online from scratch, position descriptions, classification titles, previous postings, or templates.
  - Ability to designate internal recruitment dates and specifications.
  - Ability to automatically or manually transition positions from internally posted to the general public.
  - Unlimited number of unique posting statuses with each named and labeled as designated by the Shelby Township.
  - Ability to create an online advertisement, which pushes to job boards
  - Records a complete history of each position/posting in the system along with notes.
  - Ability to code notes for HR use and/or review only.
  - Unlimited number of employment application forms (each specifically designed on a field by field basis).
  - Records a complete history associated with each applicant including notes.
  - Ability to independently attach documents (Word, .pdf, Excel, etc.) to an applicant's record.
  - Ability to send automated email notifications to applicants upon any change in their status.
  - Ability to send automated email notifications to applicants upon any change in the posting status.
  - Ability to select an individual or group of applicants to send emails on the fly.
  - Ability to select an individual or group of applicants to move, change, or archive.
  - Ability to flag applicants based upon unique circumstances and automatically route or process them. For example, applicants who were previous employees or applicants who were previously offered a position but failed a physical exam, etc.

- **Job Descriptions and Actions**
  - Includes integrated job description and position action component.
  - Houses a library of active and inactive job descriptions.
  - Ability to attach a job description to an applicant upon hire.
  - Ability to create and store unique job descriptions, regardless of title and responsibilities, under each classification.
  - Ability to convert job descriptions into posting requisitions.

- **Applicant Portal**
  - Allows job seekers to search for openings by keyword, dates, job type, etc.
  - Allows job seekers to create a secure account online using username/password and security questions.
  - Offers password reset and assistance online.
  - Allows job seekers to apply for employment online.
  - Allows applicants to view their current and historic statuses for all positions applied to in real time.

- Allows applicants to store a library of documents in their account including multiple versions of résumés, cover letters, etc.
- Allows applicants to write and build résumés, cover letters, etc., online, complete with styling and editing options.
- Allows applicants to bookmark jobs they wish to apply for later.
- Allows applicants to subscribe to RSS feeds.
- Allows applicants to skip sections of the employment application in order to complete as much of the application as possible in the event they do not have all the information.
- Allows incomplete applications to be saved so applicant may return later to complete.

Vendor shall submit a price quote detailing all of the costs involved in the provision of this product including, but not necessarily limited to the items listed below.

The items below describe the Charter Township of Shelby's solution requirements for the proposed solution.
Feel free to attach responses in a separate document.

Job Requisition The Job Requisition component of the RFP should allow users to post job vacancies into a centralized system, while providing a flexible and user-friendly interface. The job postings entered into the system will be referred to as requisitions and will include all information that is necessary for posting and advertising job vacancies. In this section, "user" refers to the administrator.	**Vendor response**
Does your solution allow the users to create requisitions for vacant job postings?	
Does your solution generate a unique requisition number for each job posting that will serve as an identifier for tracking the requisition and related applicant data through the system?	
Does your solution provide the user with a data entry screen that includes all the fields in Attachment A. (NEED TO ATTACH A)? Note any fields that are not included.	
Does your solution allow users to create a new requisition using a previously created requisition as a template (copy)?	
Does your solution allow users to update open requisitions?	
Does your solution prevent the user from updating data on a closed requisition?	
If so, if an error is discovered on a closed requisition, how can that data be amended?	
All requisitions should close at 4:30 p.m. on all specified closing dates. Can your solution close all requisitions at 4:30 p.m. (EST/EDT) on the specified closing date?	
Does your solution allow users to view all requisitions?	
Does your solution allow users to define the order in which to view the requisitions (e.g. by requisition number order, requisition creation date order, filled requisitions, closed requisitions, currently open requisitions)? Describe the options available.	
Does your solution allow users to delete requisitions?	
A reason should be keyed by the user to delete a requisition. Does your solution require users to input a reason for deleting requisitions? Describe.	
Requisition numbers should not be reused. Does your solution prevent requisition numbers from being reused after deletion? Explain.	

Online Employment Application The online job application component of the RFP should provide job applicants with the ability to complete the employment application online. After completing the application, the application data can be submitted electronically into the central application database in response to a specific requisition. In this section, “user” refers to the applicant.	Vendor response
Does your solution allow the job applicant to complete the employment application online? Describe.	
Does your solution submit and save the applicant data into the central applicant database in response to a specific job requisition? Describe.	
Does your solution allow the applicant to create a username and password for updating and future submission?	
Does your solution create an applicant record for each application record in the database? Describe.	
Does your solution provide an applicant interface that includes the following options? Describe in detail. a. Create new employment application; b. Update current and previous employment records; c. Print current and previous applications; d. Save applications; e. Submit employment applications; f. Upload attachments such as resumes, transcripts, and reference letters; and, g. Exit.	
The application will include required fields. Client-side validation should be built in so that user friendly error messages are displayed immediately if data is missing. Does your solution display an error message if required information is missing?	
Does your solution ensure that the application contains the same data fields, using the same groupings as the current Township application form (Attachment B)? Describe.	
The “print application” option should have the capability to print previous and current applications, in the same format as the online display of the application. Does your solution include this option with the features above? Describe.	
Describe the format(s) that the application will be printed in (e.g. Adobe PDF, etc.). Describe any plug-ins that may be needed by the user to print in the available format(s).	
The “save application” option should allow applicants to save their application data in a centralized data bank for future retrieval. Does your solution include this save application option?	
Does your solution require the user to create a valid profile (with user name and password) in order to save data? Describe.	
When the “submit application” option is used the system must provide server-side validation for required information that was not validated at the client-side. Does your solution include this submit application option?	
Does your solution ensure that the application must correspond with an open requisition that is in the database?	
If there is no open requisition, can an applicant submit a resume or	

generic application and ask to be notified of future postings?	
Does your solution allow the user to correct any errors? Describe.	
Does your solution ensure that the applicant record is only added to the database if all validation requirements have been met and if there is a record match to an open job requisition? Describe.	
If the validation requirements are not met and/or there is not an open job requisition match, does your solution send the user an error message?	
If the validation requirements are met and there is an open job requisition match, does your solution send the user a confirmation message?	
Does your solution allow a user, if they have submitted an appropriate name and password, to retrieve, update, submit, and print a previously created and saved application. Describe.	
Does your solution allow applicants to save their personal application data for later use, if they have submitted an appropriate name and password, so the application does not have to be recreated for every position applied for?	
Does your solution allow the user, if they have submitted an appropriate name and password, to save a minimum of two versions of their application data? Describe.	
Does your solution allow the user to save the application on the user's PC?	

Applicant Tracking The Applicant Tracking component of the RFP should store applicant records that are received in response to a specific existing job requisition in the database. This central applicant database should be accessible by authorized users from each department. Authorized users must have access to their department's data only. HR must have access to all data. In this section, "user" refers to the administrator.	**Vendor response**
Does your solution allow grouping of users by role with specific levels of access and security privileges? Describe in detail, including the administration of the groups.	
Does your solution allow users to track applicant records entirely through the hiring process, from receipt of the employment application through the selection process? Describe.	
Does your solution allow the system to be populated by both online submissions from applicants and manual data entry by authorized users? Describe.	
For each applicant record, does your solution track all of the following items? Note any that are not tracked. a. Application received date; b. Correspondence sent date; c. Screening results options; d. Selected for interview names and dates; e. Interview conducted dates; f. Background check dates; g. Reference check dates/contact person; h. Selected for hire; i. Declined offer (reason for decline); j. Position numbers; and k. Pre-employment testing including various written, oral, or demonstration scores with modifiable parts & weights; physicals; and	

drug testing.	
Does your solution provide an applicant tracking system that is menu driven GUI, providing users with an ease and flexibility in moving through the system? Describe.	
Does your solution provide all of the following menu functions in the applicant tracking system? Note any functions that are not included. a. View applicant records for specified requisitions; b. View applicant records for all agency open requisitions; c. View the record of a specific applicant (query function); d. Print applicant records; e. Generate correspondence to applicants; f. Develop screening matrix to search for basic job specific criteria; g. Create applicant ranking and list based on varying and modifiable parts and weights of component testing; h. Record interview notes; i. Record background and reference check; j. Generate pre-defined reports; k. Conduct EEO analysis; and l. Allow flexibility for agencies to alter letters.	
Does your solution allow the user to view all the applicant records that correspond to a chosen requisition, and provide a way of moving through each record? Describe.	
Does your solution allow the user to create an online advertisement, which pushes to job boards?	
Does your solution display data for each applicant into the following major categories? Note any categories that are missing. a. Personal information; b. Education; c. Experience; d. Miscellaneous; and e. References.	
Optional EEO data, if received, should NOT be displayed with the applicant record. Does your solution prevent the EEO data from being displayed with the applicant record? Describe.	
For each applicant record, does your solution provide the following option to the user? Note any options that are missing. a. Select applicant for interview; b. Send correspondence; c. Conduct background or reference checks and drop down box to indicate "eligible/not eligible for hire"; and d. Testing information.	
Does your solution allow users to select the order in which the records are displayed (e.g. chronological order by requisition number, closing dates, etc.)? Describe the options available.	
Does your solution provide ease and flexibility in moving through the requisitions and through the applicant records with navigation bars or buttons? Describe.	
Does your solution allow users to perform query functions that will allow the viewing of specified records, and allow the users to save queries for future use? Describe.	
Does your solution allow users to print applicant records individually and in batches by requisitions? Describe.	
Does your solution generate pre-defined correspondence? Describe.	
Does your solution allow the user to develop agency specific	

correspondence and select from a list of pre-defined letters? Describe.	
Does your solution allow the user to “auto send” letters, based on criteria defined by the agency? Describe.	
The system delivered letters and values should include at a minimum the criteria listed below. Does your solution provide the minimum options? Note any that are missing. a. Application acknowledgement letter; b. Interview selection letter; c. Reject letter; d. Offer letter; e. Late letter; f. Incomplete application letter; g. Reference letter; and h. No position available (for manual application submitted).	
Does your solution allow the user to develop a criteria-screening matrix sheet that can be used to identify applicant qualifications and determine the applicants to be interviewed? Describe.	
To develop the matrix, does your solution allow the user to cut and paste information from the job requisition?	
Does your solution allow the user the following matrix criteria options? Note any missing options. a. Required; b. Desired; and c. Preferred.	
The system should permit online form completion and should store the values entered to be analyzed for determining applicant ranking. A list should be provided to assist with indicating an applicant’s qualifications. The values should include, at a minimum, options for: yes, no, or limited. Does your solution provide this? Describe and note any missing values.	
Does your solution produce a report listing of applicants and their rankings, based on data recorded in the screening criteria matrix? Describe.	
Does your solution allow the user to define the maximum number of rankings to report (e.g. top 5 candidates) from a user set priority of screening criteria? Describe.	
Does your solution allow users to record interview notes in the records of the applicants selected for interview? Describe.	
Does your solution offer an interface for the interview notes that contains an unlimited text field for recording the notes with specified security settings? Describe.	
Does your solution allow users to record information received from conducting reference checks on specified applicants and maintain the references as part of the database? Describe.	
Does your solution allow agency documents such as civil service meeting minutes and union and employee contracts to be scanned and attached to applicant records? Describe.	
Does your solution provide a form that contains standard reference questions that can be modified by the user? Describe.	
Does your solution allow the reference check form to be sent to reference sources via e- mail and/or postal mail? Describe.	
Does your solution allow the user to record information received from conducting background checks on specified applicants? Describe.	
Does your solution provide a list from which the user can select the type of background check conducted? Describe.	

Does your solution include a reporting system that will provide relevant data regarding the recruitment and selection activities of departments? Describe.	
Does your solution include a reporting system that will provide standard delivered reports as well as custom reports? Describe.	
Does your solution include reporting functions that have printing features that allow users to print reports in various formats? Describe the formats (e.g. .pdf, Excel, Word, etc.).	
Does your solution permit ad-hoc query creation and export capabilities that allow users to access and retrieve data as necessary to address data analysis and reporting needs? Describe.	

• **EEO Reporting**	
○ Certain data is required from an applicant pool to conduct EEO statistical analysis and reporting. EEO data should be captured by the system but should not be stored with the applicant record. EEO should be identified by applicant record number and requisition number. In this section, “user” refers to the administrator.	
Does your solution capture, at a minimum, the following EEO data? Note any missing data. a. Requisition number (unique identifier); b. Applicant record number; c. Race; d. Gender; e. Date of birth; f. EEO4 occupational category; g. Pay band; h. Interview offered flag; i. Interviewed flag; and j. Selected flag.	
Does your solution capture interviewing and hiring results for each requisition as identified by the applicant record number as well as data related to the entire applicant pool such as the number of total applicants? Describe.	
Does your solution allow users to download/export EEO data to other applications? Describe.	
Does your solution allow EEO data to be populated by electronic submission and manual data entry (manual entry by HR used for job applications that are not received online or when an electronically submitted application is not flagged as receiving the EEO information)? Describe.	
If populated electronically the data should be fed from the applicant record and requisition data. If populated manually, users should be able to select applicants from a requisition number. Does your solution provide this ability? Describe.	
Does your solution prevent changes to the EEO data from being made once submitted? Describe.	
Does your solution allow users to enter data for race, gender, and date of birth? Note any data fields missing.	
Other EEO data should be populated from the requisition. The interviewing and selection data should be populated from the applicant record. Does your solution populate data in this way? Describe.	
Does your solution report the total number of applicants by race,	

gender, age (below 40 years of age and 40+ years of age) and veteran's status? Describe and note any missing totals.	
Does your solution ensure that EEO data is the only data that can be added to an applicant record that was created from an electronic submission? Describe.	
Does your solution provide users with a user-friendly data entry screen that will allow information from the applicant's employment application received in response to a specific job requisition to be entered? Describe.	
On the interface, does your solution allow the users to enter new applicant data and record EEO data? Describe.	
When creating a new applicant record in the interface, does your solution meet all of the following requirements? Note any missing requirements. a. Provide a screen very similar to the layout of the printed employment application; b. Allow user to obtain a list of open requisitions; c. Include a real-time field validation; d. Allow user to verify the data before submitting it; e. Perform additional system validations when data is submitted; f. Create applicant records with no data errors; and g. Provide a screen for the system administrator to create applicant records for applications submitted in paper form.	
Does your solution capture all of the EEO data entry fields listed in Attachment C? Note any missing fields.	

OPTIONAL – Performance Evaluations	
Describe any performance evaluation aspects of your system.	
Describe any employee onboarding/forms aspects of your system.	
Describe any Learning Management System (training) aspects of your system.	

Comments/Considerations: ____

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Year:	**2019 (implementation)**	**2020**	**2021**
	$________	$ ________	$ ________

Pricing for Section #4: web-based recreation management software:

Shelby Township is soliciting proposals for a web-based Recreation Management Software (RMS) which closely meets its current requirements and is capable of expansion to meet future needs. The current needs of Shelby Township include automated activity registration to include internet activity registration, sports league registration (adult and youth), sports league scheduling, facility reservations (administrative and online), membership/pass management, point of sale software, inventory management, day camp registration and documentation, CRM functions, race registrations, special event/vendor registrations, ticketing system, brochure export, financial reporting and marketing reporting. Other desired functions include internet facility reservation, internet membership sales and renewals, website management, compatibility with mobile devices and cutting-edge technology.

There are two major objectives to be met by the development of this Request for Proposal. First, it is intended to establish and define a clear set of functional requirements to be satisfied by the Hosted Web-Based Recreation Management System. Second, it will provide general direction to the Vendor in submitting a proposal that will best meet the software needs of the Township.

Shelby Township has a population of approximately 80,000 citizens and is located in the Detroit metro area. The Shelby Township Parks, Recreation and Maintenance Department includes the following: Recreation, Parks Operations & Senior Services.

Vendor shall submit a price quote detailing all of the costs involved in the provision of this product including, but not necessarily limited to:

- **Software by module (include type of pricing--concurrent, named, site, enterprise)**
- **Implementation services**
- **Training**
- **Travel**
- **Hosting**
- **Annual maintenance**
- **Other associated costs**
- **Total system price**
- **Year 1/implementation**
- **Year 2 and beyond annual maintenance fees**

Vendor information	Vendor self-rating	Vendor response
Vendor must demonstrate commitment to market, long-term viability (10 plus years), knowledge of industry needs, proven product sustainability and innovation in product and technology advances.		
The Vendor's development and quality assurance departments are distinct and separate to ensure thorough testing (i.e. consultants do not develop the product or test it – they are only involved in implementation and training).		
The Vendor will review new developments in the industry and product and provide a forum for customers to relay their input with shaping the future of the software.		
The Vendor conducts annual customer satisfaction surveys. Must provide access to summary of prior year surveys.		
Live support is available for any issues from 8:00am – 5:00pm (EST) Monday – Friday.		
Live support is available for system down and payment processing issues 24 hours a day, 7 days a week.		
24 hour a day incident reporting and tracking is available. Please list the reporting method and average response time.		
All support calls and incidents are tracked and documented. Please explain method.		

Option to import all current data for current customers to the new registration system to maintain customer history (registrations, rentals, memberships, accounting transactions)		

General system specifications	**Vendor self-rating**	**Vendor response**
Software allows the System Administrator to create, edit and delete administrative user "profiles".		
System must include a comprehensive method for controlling employee access for each user profile. Each user can be given read/write-only access to functions where applicable. Security must be to the level of each individual menu choice.		
Software must be designed as a multi-user system, and allow for an unlimited number of users. If limited, indicate the maximum number and cost for additional users. If possible please determine the minimum and maximum number of users.		
More than one operator may update the database at the same time, in the same module. A record locking feature must prevent the loss of data when two or more users are updating the same record.		
System allows for creation of user-defined menus, enabling each operator to have custom menus.		
Software allows each user to identify "Favorites" or an equivalent. In this area, users can create their own customized list of favorite task areas that is unique only to them. Upon initial login to the application, all Favorites are presented to the user.		
System provides the option to enforce strong passwords for administrative users. System allows for a variety of user-defined requirements (i.e. must contain 1 number and 1 character, must be 8 characters long)		
Operators are required to log-in only once without having to launch and then minimize separate screens for different functional areas. Upon login, the user has access to all specific areas of the system, based on their access and security rights.		
System allows for real-time access directly to the central recreation database for all users, administratively and online. Transactions are complete in one operation, with rosters, financials, schedules, demographics, and financial status reports automatically updated.		
The system works such that when the Registration and Reservation modules are utilized, the hosted system automatically accepts and processes facility reservations at the time new activities are created, without requiring any duplicate or additional data entry.		
System allows unlimited combinations of transactions from multiple modules on a single receipt and without having to launch and minimize or close separate modules. I.E. a customer can process multiple Registrations (new registrations, refunds, transfers all on one), reserve a Facility and buy a membership all on a single receipt.		
The system provides optional receipt printing. System must be able to send receipts to customers via e-mail with no additional steps and provide a confirmation screen.		
System must have ability to supply customers with itemized receipts that include all transactions.		
Text to include on Receipts, Vouchers, and Wait List confirmations is user definable.		

Customer account management	Vendor self-rating	Vendor response
Customer accounts can store all of the following data fields: • Member Name or Company Name if company is the payer (Contact name if "Company is Payer") • ID number, which can be assigned automatically or manually (unique only). • Primary guardian name, address, minimum of two (2) telephone numbers, and e-mail address • Secondary guardian name, address, telephone number, and e-mail address • Gender • School Grade • Birth Date (age is automatically updated within system) Option to override birthdate with adult if participant does not want to provide birthdate • Email address • Emergency contact name, address, phone number (unlimited), including order of contact, and e-mail • Resident/non-resident status (system automatically computes status based on address). Also, option for employee/corporate status. • Current pass/membership status (system automatically computes status based on membership information) • Customer/Household discount table (allow for unlimited, user-defined tables) • Restricted payment types (e.g. allow to pay cash only) • Available scholarship and/or voucher credit, with expiration date with flexibility to change percentage of discount. • Status (active, inactive) • Tracks date customer added to the database • Tracks last date that customer had any activity with the Township (for marketing and reporting purposes) • Track waiver signatures • Unlimited miscellaneous comments • Allow alert comments on accounts. • Allow for special needs tracking (with needs review dates, assessment dates, etc. tracked) • Allow for unlimited user-defined, additional fields to be created to track customer information		
All modules share and have available all customer data files such as names, addresses and companies.		
System must allow tracking of all family/household activity and can provide administration reports that flag accounts that have no activity for a defined period of time.		
Customer must have access to all account transactions (from all modules) and ability to print this history.		
Software offers the ability to search for a customer as follows: • Perform a search on customers and companies. For instance, enter "Thompson" and system would return all customers named "Thompson", "Tompson" and "Thomson".		

• By customer ID and by telephone number. Telephone number can be identified without use of wildcard characters (-, .)		
System offers ability to have people attached to more than one household and/or company (i.e. divorced households) while maintaining one set of transaction history per person.		
System offers ability to split households or reassign individuals to a new household while maintaining individual transaction history.		
System will alert user (admin and online) when they are attempting to create a duplicate account. An alert will display without requiring user to enter all account information first. Explain methodology.		
System has automatic search for duplicate account functionality, whereby duplicate accounts can be quickly, easily and automatically merged without losing transactional information. Explain methodology.		
System provides integrated CRM capability, where the display and layout of the Customer View is fully customizable, including ability to choose which "widgets" are desired to filter desired customer information.		
Notes or comments placed in accounts would automatically display whenever the household was accessed in any module (administratively or online). The title and type should be customizable. Administration should have the ability to set as a pop up alert or only display on the account.		
System allows creation of future alerts/notes/reminders that can be applied to (a) individual customer, or (b) batch of customers		
System allows users to set valid start dates and valid expiry dates for notes/alerts/reminders; the system will automatically post and remove the note/alert upon reaching those dates.		

General system specifications – IT requirements	**Vendor self-rating**	**Vendor response**
The Recreation Management System (hereafter referred to as 'RMS') must be cloud-based and fully web integrated. • All operational, management and reporting functions must be accessible via a web interface, including all POS system operation, membership card printing, guest check in, etc. • The RMS must be able to function without need for any dedicated servers or processing hardware present on the Township's network.		
Software allows staff to access the organization's data from anywhere at any time with just a browser, internet connection and user ID and password.		
The RMS must enforce browser-based SSL encryption for all staff interactions with the system.		
The Township does not have facilities to process credit cards directly, so all credit card transactions must be handled by third-party processors and be fully PCI-compliant. • The RMS must be easily upgradable to and fully compliant with the EMV (Chip and PIN) credit card processing standards		
The Vendor must have facilities to provide responsive technical support for the entire product, including all software and hardware via a toll-free telephone number during Shelby Township facility hours (8:30 a.m. to 5 p.m., Monday - Friday).		
The RMS must have online help available on all pages of the web application. • The online help must provide field-level definitions and		

explanations specific to each page. • The online help must provide field-level definitions and explanations specific to each page. • The online help must provide report samples for all standard system reports.		

General system requirements - reporting	**Vendor self-rating**	**Vendor response**
All reports have the ability to be viewed on screen or output (with graph options) as Excel Spreadsheet, HTML, or PDF files. List number of standard system reports.		
System must provide ability to export financial reports and daily cash reports to municipal financial package (New World Systems)		
Selection screens allow the user to narrow the report specification by choosing only relevant data, such as reporting just for a single building, for a single or group of facilities, dates, times, etc. Report selections of this type may be made either individually, or in combinations.		
Software provides and ADHOC reporting tool that allows standard reports to be customized to meet user needs or for new reports to be created from scratch.		
Software will produce all of the following "Daily Close" reports: • Cash Receipt Report, listing all receipts processed, payment type, and totals • Cash Distribution summary, showing all payment distributions • Account transfer report, showing funds flow among revenue accounts		
Daily, Monthly, and Yearly reports can be specified by date range, starting and ending receipt numbers, and starting and ending voucher numbers.		
Demonstrate/explain how year-end reporting appears.		
Software produces Net Revenue reports, including in a summary or detail format, and with sorting options for each module (i.e. Activity Registration sorted by Activity, Season, Category, or Revenue Account, etc.)		
Software produces a Refund report, showing all refunds for a specified date range/GL Accounts/User/Class		
Software produces reports of all charges and payments coming due.		
Software produces reports, by Activity, for Net Revenue.		
Software produces all of the following Activity reports: • Master report listing all activities, description, dates, times, etc. • Report listing all activities and all Text descriptions, notes, etc. • Under minimum enrollment report • Under maximum report • Full activity report • Activity totals and statistics		
Software produces Attendance Sheets, which include actual session meeting dates(s) and a spot for sign-in and sign-out.		
Software produces customizable rosters, including all of the following options and data elements: • All rosters for a site, category, instructor, or supervisor • All rosters for activities starting within a specific date range • "Brief" or "Expanded" roster formats with ability for administrator to customize the data that is included on the roster		

(i.e. participant name only, participant name, email, phone number and emergency contact, etc.) • Printed rosters, or mailing labels for participants on a roster • Rosters by enrollment type, such as waitlist, early-bird registration, refunded entries, etc.		
Software allows rosters to be sorted by a variety of filters including chronological entry order, alphabetical, team name, age, etc.		
System uses easily exportable rosters (to Excel especially) directly from the proposed application. Can email directly from system or in exported file.		
Must be able to e-mail the listed instructor/coach reports (such as rosters or attendance worksheets) directly for the proposed application. Can send rosters to any recipient, not just listed instructor		
Software produces the following membership reports: • membership rosters of various membership packages • renewal and non-renewal reports • membership usage reports by period set by staff		
Software has ability track visits for programs, rentals, and memberships.		
Software produces daily activity report.		

General system specifications – payment collection, financials and fiscal reporting	**Vendor self-rating**	**Vendor response**
System must allow for: • Full payment • Partial payment • Payment from customer credit/voucher • Payment reversals • Credit balance refunds • Deposit refunds • Scheduled payments		
System must allow for multiple user-defined payment methods to be used both administratively and online by customer, including but not limited to (list all forms of payments acceptable): • Coupons • Gift cards • Scholarships • Account Credits/vouchers • Credit Card: card entries must have the ability to input 3 digit security code and be PCI complaint • Electronic Check • Cash (in person only) • Paper Check (in person only)		
The system can accommodate multiple persons paying for a single enrollment transaction and on a single receipt. For example, a divorced set of parents can each pay ½ of the total enrollment fee(s) for a child using two separate checks.		
System must be able to process the following (but not limited to) types of discounts, both administratively and online by customer (with the ability to turn on and off): • Sibling discounts (see below for specifics) • “Pre-fill” conditions can be assigned to each activity fee or		

discount (i.e. automatic member discounts based on member status, senior pricing automatically adjusts based on age listed on account) • Percentage Discounts • Coupon or Code Discounts • Amount discounts (i.e. $10 off)		
Software offers the ability to process multi-child discounts and charges. Each activity can be setup with a minimum and maximum child range. The system will check for multiple children on the current receipt and then will select or unselect the multi-child charge accordingly.		
System must allow for unlimited split payments among multiple payment methods.		
If an incomplete payment is received in any module, online or administratively, software will allow and create a payment plan for the customer. Payment plans can be calculated and created based on weekly, bi-weekly, or monthly payments.		
Ability to have EFT payments through checking or credit cards		
The software provides the following options for whether payments for outstanding balances are required: • outstanding balance payments are optional • outstanding balance payments are required • outstanding balance payments are required for outstanding balances of $'X' (the Township defines 'X') • outstanding balance payments are required if the outstanding balance has been due for a certain number of days as determined by the Township		
System allows for deposit to be placed including a partial payment at the time of reservation, creation of invoices and statements for outstanding payments due, and collection of the remaining balance later.		
Software has the ability to calculate and track customer balances, provide reports for all payments coming due, and accept customer payments on account.		
If there are any payment plan payments on a transaction, additional text is added to the receipt, providing the receipt number and the payment plan balance is listed for each payment plan that the customer paid on.		
Software has the ability for administration to post adjustments to the customer's account balance.		
System must have the ability to cancel any transaction(s) with the following options: • Apply credit to the household balance • Apply surcharge fees • Apply split refund payment types (i.e., ability to process a refund with portions applied to multiple refund payment methods by original payment type) • Refund "from cash drawer now" to be limited to credit card payments and same day cash or check transactions only. Ability to require supervisor authorization. • Refund later from system to be limited to credit card payment types. Ability to require supervisor authorization. • Refund later from finance department to be limited to cash or check payment types.		

• System creates a refund voucher on account. • Ability to track NSF checks		
Software will permit refunds without withdrawing from an activity. For example, the enrollee may be given a pro-rated refund without having to withdraw them from the activity. • System can also automatically withdraw a participant upon refund. Both must be user defined and adjustable per activity.		
Refunds must be appropriately accounted for in daily cash reports and do not cause incorrect/unbalanced cash reports.		
When System refunds fees on a permit, it can also simultaneously cancel the permit, any associated payment plans and removes the reservation from the facility schedule.		
For mass refund transactions (refunding fees for multiple customers), you can refund: • the entire activity fee • only part of the fee • refund and withdraw selected customers • refund and leave selected customers registered.		
System must allow for customer/household credit balances, with the ability to apply multiple ways.		
System must allow a household with a credit balance in any module, to use that credit in any other module, automatically.		
System can require payment reference information to be entered during transaction processing. Example: Customer check number required for tracking purposes.		
System must allow the ability to balance (cash out) by user/employee, assigned cash drawer, location, for any date range, any time range, by function, general ledger account number, cost center, payment method, or for the entire system.		
System supports both cash=revenue and modified accrual accounting methods of revenue recognition; system is configured accordingly during the initial implementation stages.		
System supports deferred revenue accounts for revenues collected, but not recognized until future periods and provides a report that states the deferred amount and date for when it will be deferred to.		
System must have the ability to sell and redeem gift cards. • Maintain gift card balance and all transaction history associated with each card. • Gift cards must be able to be used and reloaded administratively and online by customers. • Searching capabilities by card number, date of purchase, or amount must be included.		
System can hold credit card information for future use by customer and administratively while remaining PCI compliant.		
Payment information cannot be punctuation sensitive (currently, punctuation causes errors and duplicate charges with names such as O'Donnell).		
All "system" and "global" information such as G/L accounts, facilities, seasons, etc. are managed and maintained within the same software solution. For example all G/L accounts can be inputted and edited/maintained in just one area without requiring duplication.		
Software allows the user to group G/L accounts by department and then generate reports to track G/L account information by department.		

Software allows the user to define G/L accounts by site. Users can then choose to just view the G/L account information for their site when setting up activities and generating reports.		
System must provide for linking revenue to chart of account (general ledger account) codes. GL accounts are at least 12 characters long.		
Daily credit card settlements must be deposited directly into Township accounts using the existing credit card processor.		
Software uses SSL technology to ensure the security of the public's credit card transactions.		
Proposed software application meets the PCI/CISP credit card industry Payment Applicator Best Practices specifications and is PCI/DSS compliant. Proposed software applications must be compliant and maintain the most current PCI/DSS compliance throughout the contract of the service.		

Marketing and communication	**Vendor self-rating**	**Vendor response**
Marketing and Communication is built into the system and automatically included.		
One central database across all modules tracks customer information, with one view of customers across all sites in the organization(s).		
All system modules have a built in capability to create unlimited number of customized attributes/criteria termed Demographics. These attributes can be assigned to customers for the marketing sorts, mailings (email and physical), reporting/analysis, and labels using multiple selection criteria such as: beginning and ending name range, last active date, zip code range, age range, grade range, gender, resident status, program enrollments, facilities reserved, membership types held, items purchased, etc.		
System allows an unlimited number of customers lists (market segments) to be identified and created based on the criteria above (i.e. all female participants ages 5 to 12, all members with expirations in March)		
Mailing labels can be produced using any combination of filters including but not limited to population database, registration information, membership information, reservations, etc.		
System allows email to be sent directly from within the system to one or many individuals, accounts, companies, etc. Email campaigns can be sent in text or HTML and system allows for attachments to be included. Users have option to opt out of texts and email.		
Ability to personalize emails with individuals' names		
Ability to save and reuse Email Marketing Campaigns		
Ability to designate specific customers and companies as "non-mail customers" so customers will not receive unwanted communications.		
System provides Interest Lists, whereby customers are automatically grouped together by area of interest for email or letter notifications. Interest lists would be used for marketing new offerings to our customer base and would be maintained as a master list, where individual lists can be attached to specific activities, facilities, membership types, daycare programs, etc.		
Further to above, Interest Lists do not require the customer to sign up to be on the list. The Interest List should operate that persons registering for specific programs would be grouped together naturally and users can assign interest lists to programs in order to track customer preferences based on registration patterns.		

System provides ability to set up Subscription Lists, whereby customers elect to subscribe to particular mailing or communication groups that are used to send regular email or postal mail communications to customers.		
System allows both staff and customers to manage Subscription Lists.		
Ability to run transaction comparison reports including number of transactions and revenues to monitor the effectiveness of marketing campaigns.		
System provides ability to create unlimited number of "Custom Questions" that can be asked either globally or during a transaction in order to gather additional demographic or transaction specific information (i.e. What is the participant's jersey size; do you require facility set-up with rental, explain?).		
System is able to create reports on any one or many Custom Questions and their associated answers. Custom Questions and reports must be available in all modules.		
System provides integral Marketing Report capabilities, allow staff to print reports, labels and generate email lists based upon multiple selection scenarios, such as zip code, gender, area, membership renewal and age range.		
Brochure Download: Ability to export activity information including times, facilities, descriptions and pricing for use in brochure/catalog creation using Ascii files (CSV), In-Design or camera ready files (RTF)		
Ability to send SMS or TEXT messages to mobile devices through a designed group of recipients via the system.		
Ability to provide and process surveys/questionnaires online and during registration process		
Ability to provide and process applications for booth and vendor merchants.		

Activity registration	**Vendor self-rating**	**Vendor response**
Participant data fields include all of the following: • First and Last Name, Street Address, Township, State, and Zip Code • Home, work, emergency, and cell phone numbers • E-mail address, Birth date, Age, Sex • Notation if resident or non-resident; member or non-member • Participant ID number, Family ID number • Customer balance, Customer Type, Company Text Notes		
Activity data fields must track ALL of the following elements with the ability to be turned on and off. • Activity Number, Activity Name • Activity pricing options (resident/non- resident; member/non-member) • Season, Category, Instructor, Location • Staff Supervisor • Activity status (open, closed, tentative, on- hold, etc.) • Gender • Beginning and End date and Time • Days of the week activity meets with exception dates		

• Date that registrations will be first allowed • Date information should show online • Minimum and maximum age or school grade • Minimum and maximum roster capacity • Prerequisite activity/skill requirements • Calculation and storage of all session dates and times • Enrollment statistics • Denotation of the mailing lists suitable for each activity		
Software allows capability to set priority registration dates for each activity, allowing defined participants (i.e. returning participants) to register ahead of new participants. System will allow the specification of the dates and times for priority registration depending on multiple filters (i.e. resident status). This can be turned on and off.		
Text may be entered for activities, including a catalog description with text to appear in a class catalog or activity guide, "Notes" to appear on the customer's receipt, and "Notes" which are for internal staff use only.		
Software will export activity information to a data file for use with a desktop publishing program.		
Software must allow an unlimited number of activity fees to be assigned and entered for each individual activity without having to create a new activity (i.e. Boom shares the same class description and information but cost $50 in May and $37.50 in April). A separate revenue account should be able to be assigned to each fee.		
Software allows entry of beginning date, beginning and ending time, and selection of which days of the week it will meet. Software will automatically calculate all session meeting dates, providing a complete list of all dates, number of total session meetings, session exceptions and total session hours.		
The Activity Registration will allow facilities to be scheduled and reserved at the same time that activities are entered or modified. Scheduling/ reservations are to be performed without requiring duplicate data entry or requiring switching between programs.		
Activities may be designated on an individual basis as to whether any special notes or information must be captured at the time of enrollment (i.e. jersey size).		
Activities can be designated a "team sport", such as soccer. When identified as a team sport activity, the software will automatically track player and team names during the enrollment process, will automatically assign players to teams if desired by the staff, and will produce activity rosters (as defined in Reports section).		
Activities can be coded as either "Open" for activities which are in the current season, or "Closed", for activities which may only be offered in other seasons. Software will allow new enrollments into all "Open" activities, and not allow enrollment into "Closed" activities.		
Software does not require one session to be closed before starting another.		
Registrations made throughout the session have the ability to charge pro-rated amounts. This feature must be able to turn on or off as desired by administration.		
Software will allow registration of participants into activities offered in multiple sessions at the same time, such as registration in both late Summer and early Fall programs.		

The system allows activities to be copied from one season to another and may then be updated with new dates, times, etc. for the following season/year processing (using the same number). Retired data/rosters are stored permanently in a historical file and accessible for marketing purposes.		
Software allows multiple prerequisite activities to be included together in individual groups so that any match within the group will be considered to meet the prerequisites for that group.		
Allows staff to enter Pass/Fail marks and add/edit/delete skill level comments of participants of activities.		
Software allows the "appropriate" mail lists for an activity to be identified at the same time that the activity is created. When so identified, participants will be automatically added onto the appropriate mailing lists when they are enrolled into the activity, without requiring a separate screen or any data entry at the time of enrollment.		
One or multiple mailing lists can be identified as being appropriate for individual activities at the time the activity is created. If a mailing list is identified in this manner, all participants who enroll for this activity will be automatically entered onto these mailing list(s) without requiring additional data entry.		
Software allows staff to change the stored parameters of any activity while in the registration software program, and without requiring the need to open or "launch" a separate maintenance program. Examples of such changes to activities include increasing the maximum class size allowed, or adding, deleting, or changing the activity fees.		
System allows New Enrollment, Refunds, Transfers, Deposits, Wait List entries, and Voids with the ability to control user access.		
Software allows staff to register participants through their workstations at the same time that customers can register themselves through the Internet. Both must operate in Real Time mode.		
During enrollment for a minor participant, the parent or family name does not need to be entered first.		
During a registration, the system should: • Warn the operator if a registration does not meet the age, grade, gender, or other requirements for the activity • Warn the operator if the participant is already enrolled in the same activity • Warn the operator if they attempt to register prior to the registration opening • Check enrollments of selected individual for time conflicts with existing program registrations and provide them with the ability to confirm the registration and allow the conflict • Allow the operator to select an individual by name, guardian name, ID number, or telephone numbers • Allow a participant to be enrolled into multiple activities without having to re- select or re-input the participant name each time. • Allow multiple participants to be enrolled into the same activity without having to re- input or re-select the activity name each time • Allow for the automatic calculation of multiple child/participant discounts based on enrollments into the same type or session of a program(s).		

System allows for overrides of age, grade, gender, and/or max counts requirements. Overrides must be adjustable by the users clearance (i.e. front desk staff may not override)		
When there is an age restriction for an activity, the system automatically calculates the age of the enrollee as of the first and/or last session date, and not as of the date of enrollment. Age can also be calculated from an activity specific date entered by the user that overrides the first session date.		
Any type of non-enrollment transaction can be processed both before and after entering an enrollment without having to launch or switch between different programs or screens. An example is to sell a customer a membership and then enroll them into an activity all in one step, or enroll them first and then sell them a membership all in one step, etc.		
Participants can be "transferred" from one activity to another using a "transfer" capability in the software and all in one step that does not require one step for deletion and a second step to re-enroll. A single consolidated receipt can be printed that includes what the participant transferred out of, and what they transferred into.		
Transfers will automatically calculate cost difference and credit/refund the customer when necessary while financially crediting or debiting the appropriate ledger accounts.		
The enrollment process allows "keyword" selection of activities by activity name or activity number. Using a "keyword" is the normal method for selecting an activity.		
If an activity keyword is entered, (i.e. "Dance"), the system will find all activities that have the word Dance in the Activity Description, regardless of whether Dance is the first word in the description or is embedded in the Activity Description.		
Software allows for more advanced searches than what is possible with a keyword. (i.e. viewing all activities for a selected location or category, such as all "Aquatic" activities). Ability to sort by 2 levels or more such as all aquatic activities for 6 year olds at the indoor pool.		
When an activity is full, the system allows customers to "register" as a waitlist enrollee. The waitlist function must be able to: • Turn on or off for individual activities • Display the number of registrants currently on the waiting list (online and administratively) • Allow for a maximum number of waitlist entries per program-session • Charge enrollee the registration fee at time of waitlist registration or after the waitlisted registrant is successfully enrolled in the class. Must be able able to turn this feature on and off • Sort waitlisted enrollees by the date and time in which they register (enrollment on waitlist should be first come first serve) • Easily move individual wait list entries either up or down in priority • Allow customer inquiry into position on waitlist. Must have the ability to turn this feature on or off • Confirm the participants are in the correct age/grade level and identify when an enrollee is on the incorrect waitlist		

• Store contact information • Produce and print Wait List confirmations.		
Software has a Team Management function that allows users to add and remove enrollees from teams.		

Facility reservations	**Vendor self-rating**	**Vendor response**
Facility data fields are to include all of the following elements: • Facility Code/ID • Facility Name • Center • Facility Type • Facility Capacity • Contact for reservation • Opening and closing times for each day of the week • Overlapping facilities • Set-up Information • Text facility notes • "View-only" schedule • Individual "skip dates" for the specified facility • Default permit disclaimer to use • Minimum reservation time, in minutes • Search keywords (such as a room with a CABLE TV hookup) • Denotation of which mailing lists are appropriate for persons who rent this facility.		
Software will allow entry and management of multiple facilities and facility types. The system will display a list of all facilities, or allow searches for facilities based on any one or any combination of these same parameters.		
Software will allow entry of rental charge data in a Facility Rental Price List, and thereafter automatically price new reservations, including hourly charges, deposits, and more. New charges will take into account the required deposits, rental fees, customer type, and appropriate facility charges.		
Software allows setup and automatic application of reservation fees based on numerous filters such as Customer Status, Facility Type, Event Type, Day of Week, Time of Day, etc.		
Facility Rental Price List to allow for unique charges down to each individual facility, and allow for variable charges based on customer types (i.e. resident status, profit, non-profit, etc.). Software shall allow entry of an unlimited number of customer types.		
Software must: • Allow users to add reoccurring events (administratively and online) • Allow users to add events to multiple resources at one time (administratively and online) • Have the ability to link facilities into facility groups to allow for reserving multiple facilities in one step (i.e. can rent Football Field 2 OR rent all Ford Field Open Space fields OR rent all of Ford Field Open Space). • Allow users (administratively and online) to delete/edit events		

and track appropriate finances • Track who entered, deleted or changed events • Produces permit contracts receipts • Provide customer with detailed records of all reservations		
System allows the ability to do on-line internet reservations (which can be turned on or off). These can be specified by location, date, activity or other user-defined filters.		
Software allows access to individual facilities to be restricted by user, as well as by security profile access.		
Software will allow reservations to be processed for individuals, companies, or both. If a company is used, Software will allow entry of the agent or contact person.		
System allows the setting of both the minimum *and* maximum number of days in advance customers can reserve a facility. When both values are set, customers can reserve an entity only within a specified period of time prior to the session date.		
Software allows searching for unique keywords within specific facilities, such as searching Meeting Rooms but also being able to specify that the desired room must have a CABLE TV hookup.		
Software allows search by Facility Name, Center Name, Facility Type, Facility Capacity and Geographical Location.		
If a user wishes to narrow the search and display of facilities, the system will permit the search to be narrowed by limiting the displayed facilities to a Center, Facility Type, Site, Area, or combinations of these.		
Software automatically will search for multi-day or multi-facility reservations, such as for a customer who wants to reserve a meeting room from 1 to 3pm, from June 1st to July 30th, only on Tuesdays and Thursdays, and only on the 1st and 3rd weeks of the month. After searching, Software will display a screen that shows number of dates requested, which facilities were searched, and which facilities were available for the requested dates.		
Software allows users to search for a block of open time between specified dates and times, rather than a specific date and time pattern. For example, if a user performs a normal search inquiry for facility types of "Picnic Area" for Aug. 1st from 6pm to 10pm, the system will search for open time on Aug. 1st from 6pm to 10pm. User can define Open Time Block length for search such as search all 60-minute time blocks for specified date. User then has the option to choose the open time block they wish to reserve.		
Software will automatically detect if a facility is unavailable due to an overlap conflict, such as if the Soccer Field is being used, which would make the Ball Field unavailable for that same time.		
Prior to the completion of a repeating/pattern reservations, all line items must be displayed), to allow for adjusting or deleting items without having to process another transaction.		
Software handles 24-hour reservations.		
Approval Stages: Software has a Reservation Request function that allows tentative reservation of entities that require administrative approval. These reservations can have expiration dates. When the expiration date has been reached, the reservations are no longer valid.		
Software includes a Permit Approval Tracking feature that allows users to setup email-based approval tracking to manage reservations that require extensive sign-offs from other departments, such as Fire,		

prior to permit approval.		
Software will allow the "attachment" of one or more disclaimers along with each reservation that is processed. • The Software will allow multiple disclaimers to be entered and stored. • Text to include on Disclaimers, Permit Contracts, Vouchers, and Receipts is user definable.		
Software will notify operator if they attempt to reserve: • A facility that has already been scheduled for that date and time • A date and time that conflicts with a "global" date restriction • A facility that is unavailable due to use by an "overlapping" facility. • A facility that has a conflicting "individual" date or time restriction.		
System offers the ability to cancel reservations from both the charge or payment screens. When the reservation is cancelled, the reservation is removed from the system. When canceling a permit, the facility is no longer booked. Refunding a permit alone does not assume cancellation.		
The system must allow for the transfer/cancellation of a reservation, with the appropriate transfer/cancellation fees.		
Software will track the Event name and number of persons attending for each reservation. After the reservation is completed, the Event Name is to be thereafter displayed in the Scheduling Calendar when viewed in the Daily and Weekly format.		
System offers the ability to view schedules online without having to offer the ability to reserve online. The ability to view a calendar online can be turned on or off by administration.		
Software provides a user-configurable on-screen scheduling calendar to view any number of facilities at once and by day, week, or month. • Time increments in the Scheduling Calendar may be set as low as 5-minute increments up to 2-hour increments. • The defaults which control the date, display time increment, facility, and starting display date/time can be controlled and set by the user. • Must be printer friendly		
Software allows the user to link from a facility calendar to the schedule detail for that week. Usage calendars to be in day/week/month calendar type format, and to include the Event name and beginning reservation time.		
Software offers the ability to add extra detail information to the facility records such as floor plans and pictures.		
Software will produce printer-friendly reports specific to facility scheduling module including: • Facility Master Report, showing all facilities and individual venues (can show reserved space and available space) • Usage of each venue (rentals, attendance, activities and daily customers) • Facility Event Setup report for the maintenance staff, which includes all reservations for a selected date range, and includes setup instructions. • All reservations for a specific center		

• All reservations for a specific facility type, such as Meeting Room or Ball Field • All reservations for a specific date range • All reservations for a specific customer • All reservations with the same or similar titles (i.e. day camp 2016, day camp, camp 2016, etc.) • Combinations of the above		
Software will allow entry and storage of “standard” setup instructions, which can be individually stored and customized for each type of facility. When a reservation is processed, Software will allow attachment of standard setup instructions, and also allow entry of specialized or custom setup instructions. A report can be printed for setup requests.		
Software allows reservation inquiry by person’s name or facility name, and provides printed reports or “on-screen” review of all reservations.		
Reports can be customizable by user and must be available to view, email, export or print. Software should provide the ability to email the calendar or link to specific calendars.		
System must allow the user to maintain as much history as desired. Reservations may be kept in database indefinitely. This requires that data purges include the option for the user to select the date ranges and types of reservations to be removed.		

Pass/membership management	**Vendor self-rating**	**Vendor response**
The system must provide for any number of pass/membership types. Any membership type can be valid for a date range or a designated number of visits (computerized punch), or a combination of both.		
Must have the ability to purchase memberships online.		
Software should be able to store and maintain numerous customizable membership data fields such as Membership Package/Name, Discounts, etc. Please provide a list of the data fields included.		
Software should provide unlimited levels of membership package fees and discounts with ability to set specific dates for membership specials (i.e. summer passes discount valid March 1 – July 30).		
Pass registration option to process by family, multiple members (select 2 only) or individual members and assign member numbers automatically.		
System must be able to sell a family pass in one step, with separate passes for each member.		
Unlimited membership types are allowed for each member. A single ID card must be all that is required.		
Age restrictions can be applied by membership type. Example: Youth memberships valid for 13–18 year olds.		
The system must allow for a membership/pass renewals: • A renewal rate, different from the current rate must be available for each membership type to apply Loyalty Pricing • Electronic signatures must be allowed for online renewals • New rates and renewal rates must be discountable and specials can easily be set up and applied online		
System provides the ability to: • Suspend customers (e.g. they are banned from using services, either temporarily or permanently)		

• Specify a date range and reason for the suspension • Specify whether the suspension includes the customer's family • Specify which functional areas/modules and sites that the suspension will include • During the suspension period, the membership will not need validated but will automatically become active once the suspension period has passed.		
Must be able to re-print lost or destroyed passes (ID Cards).		
Ability to reprint member ID cards directly from member file. Simultaneously must also allow for the update of the members photo/image.		
Software supports use of the following "check in methods" • bar code scanning • mag stripe scanning • fingerprint scanning • manual keyboard member ID input		
Software is compatible with creating membership cards with bar code labels and mag- stripes, using equipment that is either in place or is optionally available.		
When a membership card is scanned by the bar code reader or mag-stripe, Membership software automatically verifies the card to be valid, and updates the member's attendance record at the same time.		
Software produces warning if a Membership card is scanned that is invalid.		
If a member's card is scanned by the barcode reader or mag-stripe, and the member's account shows that one of their membership packages is about to expire in a user-definable number of days, the system displays a warning to the operator to allow them to notify the member.		
Must be able to track visit history and statistics for each membership type. Must retain prior year's membership data for comparative reporting purposes.		
Software must provide membership sales comparison report that shows year to date sales versus last year to date sales, with differences, broken out by month.		
Provides pass visit history report by customer with summary or detail option, showing visits by entire family or individual, by type or by date with graph option.		
Software to track income and revenue by each package type, broken down by individual fee charged, income refunds, and net revenue.		
Software will produce numerous membership package reports (i.e. net revenue report) Please provide a list of the reports included.		
Software will allow members an option to pay monthly for memberships and will allow the member an EFT or credit card option for monthly payment.		

Point of sale	**Vendor self-rating**	**Vendor response**
Point of Sale (POS) module provides full cash register/point of sale functionality (e.g. system can fully replace cash register), with the ability to balance individual drawers.		
System allows for locking cash drawers that automatically opening them when a particular transaction is completed.		

Ability to record and track a variety of sales transactions. POS should process the same functions as all other modules. User permissions for these functions must have the ability to be set and modified for each module (i.e. front desk staff can register participant for open spot, but may not override class restrictions such as age).		
POS is fully integrated with other system modules and has access to the same account balance (e.g. taking a payment for a program automatically opens the POS module and pulls the balance forward).		
POS is fully integrated throughout multiple facility locations (i.e. Rec Center, Fieldhouse, Cafe) with the ability to share buttons or have specific buttons for each location.		
POS should have different user permissions and logins to be able to track each staff member's transactions.		
Cashiers have the ability to use different terminals and modules in a given day.		
Any items sold in point of sale must be able to be linked to any revenue account number.		
Must allow for the selection of the item/service/ticket to be sold by each of the following methods: • Selecting the item from a list • Barcode (UPC or other) scanning • Programmable keyboard or keypad		
Touch screen functionality available and customizable.		
Touch screen sales must allow for unlimited number of drill-down screen layouts, to accommodate any number of inventory items at the point of sale.		
Touch screen option for POS sales screen must allow for user-defined touch buttons—size, color, function, type.		
The system must allow for the sale of an unlimited number of line items for each transaction.		
System can process membership sales by family, multiple members (select 2 only) or individual members and assign member numbers automatically directly from POS.		
Ability to display cash transactions including balance due and change to be returned.		
Items can be set-up as a specific price (PLU) or as an open price (department). Prices can be overridden if needed.		
System must provide for coupons or discounts, with the ability to discount a flat dollar amount or a percentage amount. In the case of a percentage, must be able to take percentage of last item sold (in the current transaction) or all previous items sold (in the current transaction).		
Ability to create/edit/accept gift cards, coupons, credits/vouchers.		
POS module accommodates multiple and split payment methods including cash, checks and credit cards for one transaction. Provides breakdown of method of payment used.		
System must allow for the deletion (void) of a single item during a transaction, without having to restart the transaction.		
System must be able to process immediate refunds credit cards, cash and check (cash and check limited to same-day refund only).		
System must provide the option to print or not print receipts.		
Receipts are numbered in order to allow for the identification of transactions and to provide a full audit trail.		

Ability to supply customers with itemized receipts, even after other transactions have been completed.		
System should provide a sales tax option for each sales/transaction code.		
Each of the following types of commission types may be associated with the ticket sales. Each ticket type may be assigned a commission type for remittance of ticket revenue to the Vendor: • Flat amount of sale price • Percentage of sale • Flat cost remittal		
System includes complete tip processing.		
System must provide the option to link a transaction to a customer for reporting and statistical purposes.		

POS System should accommodate the following report options in addition to those listed in General Requirements:
• Ability to record and calculate taxes by commodity
• Ability to summarize transactions, payment type, general ledger account, location, individual or group of selected SKUs
• Ability to track non-revenue admissions
• Reports on a centralized basis (system-wide totals) as well as on a local basis (totals for a particular station only).
• History reports with a way to make notes in the system
• Usage Reports
• Sales reports by #SKU
• Daily/Weekly/Monthly/Set-Range Reports
• End of Day Cash Reports
• Year to date sales vs. previous year's sales
• Ability to easily update programming centrally including:
  o Create/edit buttons for pricing changes
  o Create/Edit SKUs for multiple locations
• Tax changes
• Changes to product mix/inventory		

System has the ability to provide point of sales functionality at remote locations		
The POS system must utilize a third party provider to process transactions. The township utilizes Elavon for all credit card processing		

League scheduling	**Vendor self-rating**	**Vendor response**
System provides for the import of league and team data from the program registration function in the software. Enrollments may take place in the registration module, then automatically feed the league scheduling module the information creating team rosters without having to duplicate data entry.		
System must maintain the following team and member data (with the option to turn on and off): • Team name • Primary contact, address, e-mail address, and phone numbers • Secondary contact, address, e-mail address, and phone numbers • Team members names, addresses, e-mail addresses, birthdays, gender, and phone numbers (with notes)		

• Team members may be selected from the central database of households and members • Track team balances		
System allows for league payments and reversals. Deposits and account balances can be created.		
Registration and payment available over the internet.		
Teams and individuals able to waitlist for specific leagues.		
Software must produce league team rosters with the ability to email the coaches or team captains and add multiple recipients when needed.		
Provide the ability to print mailing labels, letters and direct email messages to league coaches, players, and officials.		
Multiple facilities with unique times for each may be linked to each league. Example: Three different fields are used for the men's softball league.		
Software can automatically reserve/book facilities during the schedule generation. System will identify any facility conflicts. If facility is already booked, there must be an option to override that booking for specific user permissions. Also have the option to release those facilities if the space is not required.		
System must provide for league schedule template import and customization (user-defined schedule templates).		
Ability to allocate practice facilities and times.		
The system must provide for the scheduling of any number of leagues with up to ninety-eight (98) teams for league and tournament play with the following types of schedule options: • Normal regular season • Round robin schedules • Single and double elimination tournaments • Three-game guarantee tournaments • Standard and seeded brackets for tournaments		
System should allow for creation of tournament brackets at the end of the regular season based on league standings and provide concise viewing option online for customers.		
System must allow for unlimited schedule exemptions by team, by facility and for the entire league. Exemptions are times when the team, the facility, or the entire league will not be able to play. The schedule for the league needs to be adjusted to meet the exception when creating the game slots.		
Allows multiple days and times per week.		
Balances league based on times, location and home vs. away.		
Create back to back games. Ability to switch home and away for back to back games.		
System provides ability to cancel games then reschedule. Ability to modify any date without having to cancel the whole schedule.		
System must allow deleting of one or more teams from a league, and then automatically regenerate a new schedule.		
System must allow manual adjustment to a league schedule to meet any special requirements. Allows for adjustments to any game in the schedule.		
The following reports can be viewed online or printed • Report to verify balanced league schedules • League results report that shows final scores as posted		

• Multi-league master schedule • Team schedule printouts, listing all games and times for a team • League schedule printouts, listing all game and times for the entire league • Ability to enter/post scores of games which automatically updates league standings programs and reports. This can be accomplished on site with mobile or wireless device		
Software must produce league standings reports available for print and online viewing.		
Ability to “roll-over” leagues from session to session.		
Provides league revenue reports, must be available to display revenues/fees for each league.		
Provides balance due listing, which includes all the teams with a balance due.		
System has the ability to provide official scheduling capabilities if desired.		

Day camp / flexible registration	**Vendor self-rating**	**Vendor response**
Day Camp module must be fully Integrated with all modules, and information must be shared between all modules.		
Camper data fields are to include <u>ALL</u> of the following elements: • Camper Name • ID number • Address • Gender • School Grade • Birth Date • Email address • Primary guardian name, address, two (2) telephone numbers, and e-mail address Secondary guardian name, address, two(2) telephone numbers, and e-mail address • Emergency contact name, address, phone number (unlimited), including order of contact, and e-mail address • Medical Information • Enrollment Date • Resident/non-resident and Member/Non- member status • Tax status • Available scholarship and/or voucher credit, with expiration date • Customer/household demographic codes • Tracks all required camp waivers with signatures (up to 20 different waiver forms) • Restricted payment types (allow cash only) • Ability to associate scanned documents per registered camper • Allow for special needs tracking (with needs review dates, assessment dates, etc. tracked) • Unlimited miscellaneous comments • Capability to access participant information through tablet or by phone		
Ability to tailor specific child care session details including description		

notes, facilities, minimum and maximum capacities, and available dates and times.		
Allow for online registration with specific needs: • Registration deadline for each day, week or month of camp. (i.e. registration for Tue. • ends Mon. at 5 p.m.) • Set priority registration for returning campers • Set registration for different groupings (i.e. spots on bus #1 and bus #2) • Ability to modify price and options by date to accommodate special date (field trips or pool day) options • Allow users to register for multiple days at one time • Ability to pick days attending from a calendar format • Can review/ modify/delete without having to start over		
Ability to create prerequisites for online registration (i.e. all required paperwork per child must be submitted or downloaded prior to registration)		
Custom waivers must be attached and signed (electronically) to allow completion of registration.		
Upon checkout, provide a confirmation of registration with the option for a calendar view/print with all scheduled camp dates, per camper and per family.		
Ability to assign various fee structures depending on the number or combination of days one enrolls. Automatically calculate the cost when a customer registers for a full week (have a week fee as well as daily fee).		
Provides waitlist capabilities for each camp day with the same abilities as Activity Registration waitlists.		
Have the ability to provide a discounted rate for siblings that will be registering.		
Allow customers to setup recurring payments (weekly or monthly) for their camp days. Can send auto-debit or balance due statements to customer.		
System has the ability to manage member accounts balances and credits for both camp registration fees. Must be able link with POS.		
Track and generate reports for all campers with account balances or credits.		
Ability to print calendars for campers enrolled in multiple activities (ie. Campers enrolled in swim lessons or theater production)		
Staff can view/print different reports: • Daily attendance lists with the ability to create sign in/out sheets. • Camper birthday report • Authorized pick-ups and drop-offs • Camper information • Ability to flag programs as tax deductible and then be able to run a report for each customer identifying their tax deductions for a given time period • Reports should have filter abilities (i.e. by age, by camper name, etc.)		
Ability to track attendance from both print attendance sheets and/or directly within the system.		
Ability to monitor revenue and enrollments by date, session, or child		

care programs.		
Email blasts that can be generated by participation in a certain date range and other filters available.		

Public access / internet processing	**Vendor self-rating**	**Vendor response**
System allows for online processing of the following: • Customer Account Management • Program (activities and sports) registration • Facility reservations • Membership sales – new and renewal • Day camp registration		
Account Management: System allows organization to decide what customers can see and perform on the public access side. Customers should be able to do (at the option of the organization) all of the following but not limited to: • Search by participant's name, and "on- screen" review of all activities that participant and/or entire family is currently enrolled in. • View a family's entire registration, reservation, membership and payment history. Can be viewed in family or individual view. • view and print their family schedule • view their account deposits • view their debit/credit transactions and account balance (current and prior) and print results for their record • View transactions that require attention (for example: unsigned waivers they must sign prior to their reservation being approved). • view and print confirmation pages for their current registration • view their activity/program grades in their activity enrollments • view, print out , and or download a weekly schedule of their family's enrollments with links to activity detail information • view their scholarships • change their login name and password, as well as their secret question and answer • change their personal information • change their answers to custom questions that were asked in their previous transactions (e.g. update preference for Jersey Size) • change information about their family members, as well as add a new family member or to their account • view their account balance and make payments to their account • view a list of their previous payments and receipt details • view a list of their previous payments, filtered by transaction type and date range, with payment and transaction details		
Account Management: When customer does not have an existing account, system allows them to create an account and have it immediately available for use.		
Account Management: System allows customers to add all family members at the time of account creation.		
Account Management: System allows customers to access their personal		

account information via the Internet with an assigned user name and password.		
Account Management: System provides the option to enforce strong passwords, specifically passwords must be a minimum of 8 characters in length.		
Account Management: System provides staff the ability to email and/or reset customers' forgotten passwords. If possible have an automated password sent.		
Account Management: System provides the option to allow customers to change their account information and specifies what information they can change by themselves.		
Account Management: When a user changes their account information, the system tracks the following for reference: what details changed, the date and time when the change occurred and which specific customer made the change		
Activity Registration: Software allows customer to view/edit cart without having to begin a new transaction.		
Activity Registration: System allows the customer to "quick" register for classes (i.e. if you have a customer history of Zumba, it will display all upcoming Zumba classes the customer is NOT registered).		
Activity Registration: Software allows the public to view the number of open positions in any activity/team through the entire registration process.		
Activity Registration: Once an item is placed in the cart, the system will make it unavailable to other users for a period of 5 minutes. • System will display a countdown for customer of time remaining to complete purchase		
Activity Registration: Software allows recreation staff to set up customized questions (i.e., What is your T-shirt size?, etc.) for customers to respond to during the Internet registration checkout process.		
Activity Registration: Ability to allow participants to seamlessly connect to their Facebook account to post an RSVP and invite friends to an activity. A direct link to the Township website is included in the post.		
Facility Scheduling: Software allows organization customers to view their requested reservation on a monthly calendar prior to confirming their request.		
Facility Scheduling: Software allows organization customers to view facility detail information online listing the facility location, phone contact, supervisor, amenities, min/max capacity, facility overlap information, and hours of operation for each day of week.		
Facility Scheduling: Software supports Interactive Mapping – the ability to upload a map and add links and labels, position icons and/or other elements, view availability and make reservations.		
Membership Sales: Software allows customers to search and view membership package information via the Internet.		
Membership Sales: Software allows customers to purchase and renew membership packages via the Internet.		
Membership Sales: System allows memberships to be set up for automatic renewal via credit card online as well as provide a backup form of payment should the first one be declined.		
Membership Sales: System allows memberships to be set up for automatic renewal via payment plan online.		
Membership Sales: System allows memberships to be set up for		

automatic renewal via ECP online.		
Software offers the ability to dynamically generate .html web pages and post online data already entered into the management components of the system (i.e. registration, membership and facility reservation pages). All modules interact so that no redundant data entry is required.		
System accesses the same database as recreation staff at their desks do, in real time, ensuring single view of the organization at all times. No synchronization or lag time required.		
System provides the ability to post pictures and attachments to descriptions for display online.		
Software allows recreation staff to post activities on the Internet by clicking a selection box or setting "show online" date for any activity already in the registration management component of the system. This should be in addition to a "registration opens" date/option.		
System allows the public to view all information about an activity on one page, versus having to click on various icons and have pop-up windows be displayed with one piece of information on each pop-up window.		
System has built-in waiver functionality, such that customers have to click on "Accept" in order to continue with the reservation or registration after reading the waiver – this is recorded as an electronic signature. If the customer selects the "I Disagree" option, the transaction is not completed.		
Software allows the option to set up an Internet only discount to encourage customers to register via the Internet.		
Software allows organization to accept payment online with a major credit card such as Visa or MasterCard		
Software allows customer to use credits/vouchers and gift cards as payment online.		
Software displays the user that voided a transaction on the voucher or receipt.		
Software offers the ability to determine the resident and/or member status of online customers and apply separate fees and set different online enrollment periods.		
Software offers the ability for the customer to "log off" when their session has ended to restrict access to their account information by subsequent users of the same computer.		
Software allows organization users to generate reports to track Internet registrations and revenue.		

Add alternative-ticketing module	**Vendor self-rating**	**Vendor response**
Software allows organization to sell tickets for general admission seating and assigned seating for performances and events		
Software allows the organization to obtain and track information from ticket customer for tracking of database for marketing purposes. Reporting includes statistical analysis of historical date (track patrons and season ticket holders and their dedicated seats based on specific performances, price point statistics, and days of week of show the patron attends.		
Software allows for online printing of tickets for customers and has real time data for inventory control.		
Software allows for organization to print tickets for events and		

performances with information printed on ticket including seat number, time and date of performance. Please verify type of printout for tickets.		
Software allows for printing of receipts, reports, will call, and inventory for tickets		
Ability to carry website brand to ticketing pages.		
Provide venue mapping and ability to design page to look like the actual seating		
Ability sell tickets to multiple events in one transaction		
Ticket sales available through online, mobile, and POS.		
Ability to create a dynamic ticket pricing, discounts, complimentary tickets, and group sales and tracking		
Ability to sell subscriptions and ability to renew subscriptions online		
Ability to list sponsors and donors on ticket pages.		
Ability to process donations.		
Ability to track donor membership types, levels, and expiration dates.		

Provide pricing for any optional/custom/suggested features (do not include these in the total system price above). Please provide a proposed payment schedule in addition to the total pricing.

Comments/Considerations: ____

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Year:	**2019 (implementation)**	**2020**	**2021**
	$________	$ ________	$ ________