



***Request for Proposal***

***Registration System***

***RFP 2019-011***

Lake Metroparks  
Concord Woods  
11211 Spear Road  
Concord Township, Ohio 44077

Publish Date: February 5, 2019

**LEGAL NOTICE  
REQUEST FOR PROPOSAL**

Sealed proposals will be received by the office of Lake Metroparks, 1211 Spear Road, Concord Twp., Ohio 44077, no later than 10:00 AM local time Tuesday, March 5, 2019, and thereafter will be recorded for the following:

**REQUEST FOR PROPOSALS  
FOR  
REGISTRATION SYSTEM  
FOR  
LAKE METROPARKS**

**PROPOSAL PKG. #2019-011**

Notice is hereby given that sealed proposals will be received by the office of Lake Metroparks, by 10:00 AM local time Tuesday, March 5, 2019, for performing all work necessary and incidental to the online registration system for Lake Metroparks programs, facility rentals, and other park services as described below.

All proposal documents, specifications, plans, etc., can be viewed or printed free of charge online at [www.lakemetroparks.com](http://www.lakemetroparks.com) click on “*About Us*”, next click on “*Bids/Purchasing*”. If you have any problems accessing the information, please contact the Purchasing Department at 440-639-7275 ext. 1343. Copies of said proposal documents may also be obtained at **Lake Metroparks Administrative Headquarters**, 11211 Spear Road, Concord Twp., Ohio 44077.

In the performance of all contracts, contractors will comply with all applicable federal and state laws and regulations pertaining to Equal Employment Opportunities.

Lake Metroparks is a governmental agency exempt from all local, state, and federal taxes.

Proposals must be in sealed envelopes and clearly marked with the appropriate proposal number.

No proposal may be withdrawn for at least sixty-(60) days after the scheduled closing time for receipt of proposals.

Lake Metroparks reserves the right to reject any and all proposals and parts of any and all proposals and waive any informalities.

**BY THE ORDER OF THE BOARD OF PARK COMMISSIONERS OF LAKE METROPARKS**

Paul B. Palaygi  
EXECUTIVE DIRECTOR  
Published Date: February 5, 2019

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## **SCOPE OF WORK**

Lake Metroparks (also referred to herein as Park District) is a county park district formed in 1958 under Ohio's Revised Code Section 1545. The Park District is headquartered in Concord Township, Ohio, approximately 30 miles northeast of Cleveland on the south shore of Lake Erie. Lake Metroparks currently manages over 9,500 acres of land within 38 parks and sees an annual visitation of 3.5 million. The 2019 parkwide budget is approximately \$22.5 million. The bulk of the agency's revenue is generated through a pair of tax levies approved by the voters of Lake County.

In addition to the passive use of the park facilities, Lake Metroparks also hosts hundreds of programs and special events throughout the year. Our special event calendar runs year-round and encompasses several large venues hosting an average of around 160,000 visitors throughout the various special events. Additionally, Lake Metroparks also provides smaller scale, targeted public programming based on a quarterly program schedule available to the general public which results in approximately 100,000 program participants and an additional year-round offering of educational and private group (scouts, civic groups, birthdays, etc..) programs which usually host an average of an additional 45,000 visitors per year. Lake Metroparks combined public programs and special events generally host over 300,000 people.

Annually, we process activity registration and facility reservation and billing for over 40,480 transactions/interactions and track over \$560,000 in registration and reservation revenue through our existing registration system.

Lake Metroparks is seeking an experienced vendor to provide Lake Metroparks with a fully developed and previously implemented registration and scheduling systems for our program registration and facility reservation activity management.

The park district desires a stable and reliable registration system interface that is easy for staff and web customers to use and meets the specifications laid out in the detailed scope of work section. To this end, we will require or have a strong preference for the following features:

## **DATA CONVERSION**

Lake Metroparks intends to convert limited number of the historical customer data to implement the new system. Types of records to be converted into the new system include:

- a. Account information for all existing customers
- b. Full activity history including registration and rentals in our current registration system

## **PROJECT IMPLEMENTATION AND TRAINING PLAN**

The vendor shall include a typical timeline with this proposal including major milestones for tasks and subtasks, dates and both vendor and customer resources.

Include a description of your overall approach to each of the following task areas (if applicable):

- a. System installation
- b. System configuration
- c. Data conversion
- d. Training
- e. Test planning and execution
- f. System interface design and support
- g. System roll-out, procedures, and support

## **REQUIREMENTS AND QUESTIONS BY CATEGORY**

Please respond using the codes below and where applicable fill in any additional comments or answers in the provided column.

<b>Response</b>	<b>Definition</b>
<b>(Y) Yes</b>	This feature currently exists and can be demonstrated.
<b>(N) No</b>	This feature is not supported and/or is not provided as part of this proposal
<b>(P) Pending</b>	This feature is scheduled for future release and will be incorporated at no additional cost prior to or post system implementation. (Please provide estimated release date)
<b>(E) Extra</b>	This feature is not currently available but can be provided as a modification at an additional cost. Proposer is to provide an explanation in the 'comments' column that includes the total cost of the modification (staff time, development/implementation/etc.).

<b>Code</b>	<b>Questions/Description</b>	<b>REQUIRED or Preferred</b>	<b>Response</b>	<b>Vendor Response/Comments</b>
<b>GENERAL FEATURES/DETAILS</b>				
01-GEN-01	How long has vendor been in business for Recreation related software products?	Question	N/A	
01-GEN-02	How many customers are using your proposed solution? What park systems in Ohio are using your proposed solution?	Question	N/A	
01-GEN-03	Is licensing named user or concurrent? Please include your licensing agreement as an attachment to this document.	Question	N/A	
01-GEN-04	Lake Metroparks requires that our data remains our property and must be managed in accordance with the records laws of the State of Ohio. Describe your policy for securely managing personal data and the sharing of data with any 3rd party sources.	Question	N/A	
01-GEN-05	Proposed software is currently installed and operating at other customer locations in the United States with the proposed modules and configurations.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
01-GEN-06	The proposed system meets regulatory requirements such as PCI and HIPPA and other applicable State/Federal laws.	Required		
01-GEN-07	The proposed system provides test and or training environment to sample data and to demonstrate the functions available and aid in learning the new system.	Strongly Preferred		
01-GEN-08	Solution includes on-line help, user manuals, installation procedures, configuration and maintenance procedures, and/or operations manuals.	Strongly Preferred		
01-GEN-09	Data obtained using the software is understood to be owned by Lake Metroparks and can be accessed and downloaded by Lake Metroparks in readable and convertible format.	Required		
01-GEN-10	Current registration system data can be imported/migrated into proposed system. Describe the data conversion tool(s) and processes you propose to use to efficiently convert this data from the current registration system to the proposed system.	Required		
01-GEN-11	The software allows entry of a table that includes all pertinent zip codes or postal codes, and the corresponding city. During enrollment, the staff may enter a participant zip code, and the software will pre-fill the corresponding city name automatically. This table must be used by all software modules used in the system for this type of information.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>TECHNICAL FEATURES/DETAILS</b>				
02-TEC-01	What is your application availability as a percentage?	Question	N/A	

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
02-TEC-02	Describe how problems and/or bugs are reported, fixes developed and deployed, status tracked, and customers kept informed for the proposed solution.	Question	N/A	
02-TEC-03	Describe your escalation process for issues that are not resolved during the initial call.	Question	N/A	
02-TEC-04	If cloud based, please describe any storage limitations. Include cost estimates for additional storage.	Question	N/A	
02-TEC-05	Please list any 3 <sup>rd</sup> party application dependencies, i.e. Java, Flash, Adobe Reader, Silverlight, Crystal Reports, etc.	Question	N/A	
02-TEC-06	Describe your process for receiving, evaluating, and implementing requests for enhancements to the proposed solution after implementation.	Question	N/A	
02-TEC-07	Is there the ability to change field descriptions, modify screens, create value lists, and/or other custom modifications within the proposed solution? Please describe.	Question	N/A	
02-TEC-08	Describe your typical average upgrade schedule (frequency of version releases, patches, length of time to implement, notification process) and documentation provided.	Question	N/A	
02-TEC-09	Describe the user documentation provided for the end user with your software. Describe the documentation provided for the system administrator with your software	Question	N/A	
02-TEC-10	Describe your training program, including training for administrators, technical support staff, and end users.	Question	N/A	
02-TEC-11	How much, on average, do support costs increase per year?	Question	N/A	



Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
02-TEC-12	Will we have access to export data? Describe how we would be provided access.	Question	N/A	
02-TEC-13	Is there a purge function for removing old transactions?	Question	N/A	
02-TEC-14	Where is the data stored (DB - SQL, Oracle...)	Question	N/A	
02-TEC-15	Lake Metroparks expects annual maintenance will include all updates, upgrades and enhancements to the proposed solution. Does your solution meet this requirement? How?	Question		
02-TEC-16	The software must provide the same functionality and security when accessed from any of the current versions of Microsoft Internet Explorer, Google Chrome, Safari, or Firefox.	Required		
02-TEC-17	The software must be capable of handling an unlimited number of simultaneous internet connections.	Required		
02-TEC-18	The software must be capable of simultaneous participant registration on different internet connections.	Required		
02-TEC-19	Customizations to the proposed system are retained during software upgrades (required only if customizations are made)	Required		
02-TEC-20	Vendor's development and quality assurance departments are distinct and separate to ensure thorough testing.	Preferred		
02-TEC-21	All software modules may operate independently but can share common data for participants, and companies with the other software modules.	Preferred		
02-TEC-22	User configurable menus, fields and screens.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
02-TEC-23	Software allows search on multiple fields including the use of wildcard character(s).	Preferred		
02-TEC-24	Product integrates with Microsoft Office e.g. export to Excel, Word, Exchange.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
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**SECURITY FEATURES/DETAILS**

03-SEC-01	Describe how your hosted website, access control systems, and supporting operating systems and applications are secure.	Question	N/A	
03-SEC-02	Describe your data backup process.	Question	N/A	
03-SEC-03	Do you have an established audit trail capable of monitoring intrusion attempts, and successful and unsuccessful login attempts? Do you have an established audit trail capable of tracking users responsible for record changes like refunds, transactions, etc.?	Question	N/A	
03-SEC-04	Do you have an offsite disaster recovery solution? Please describe.	Question	N/A	
03-SEC-05	Do you use Antivirus software on your hosted servers?	Question	N/A	
03-SEC-06	Does the hosting environment have access to backup power when primary power goes out of service?	Question	N/A	
03-SEC-07	How often do you test the backup power to ensure it is working properly?	Question	N/A	
03-SEC-08	Does the proposed solution allow for varying levels of administrator security? For example, could our helpdesk have access to change passwords but not setup new users or process transactions?	Question	N/A	
03-SEC-09	Does the system provide automated network client installs and upgrades?	Question	N/A	

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
03-SEC-10	Have any of your hosted sites been compromised in the last 5 years?	Question	N/A	
03-SEC-11	How often are patches released? Major releases?	Question	N/A	
03-SEC-12	How often do you patch hosted servers with security updates?	Question	N/A	
03-SEC-13	How often does your organization perform a security self-assessment of your application to identify vulnerabilities?	Question	N/A	
03-SEC-14	Is penetration testing and vulnerability scanning performed? If so, how often?	Question	N/A	
03-SEC-15	Is there a Firewall in place to protect the hosted servers?	Question	N/A	
03-SEC-16	Is TLS 1.1 and TLS1.2 encryption or newer supported?	Question	N/A	
03-SEC-17	Is your environment Single or Multi-Tenant? If multi-tenant, how do you ensure segregation of client data?	Question	N/A	
03-SEC-18	Multiple security/limited view levels that include group, role-based or user access (view, modify, report).	Required		
03-SEC-19	The software must provide internal mechanisms for protections against unauthorized access to website information.	Required		
03-SEC-20	The system must utilize secure connections for accepting and transmitting all participant information.	Required		
03-SEC-21	Vendor will provide prompt notice to Lake Metroparks of any confirmed or suspected security breaches. Notice will be provided by email and telephone to Lake Metroparks's primary IT and business contacts.	Required		
03-SEC-22	Software must meet PCI requirements.	Required		
03-SEC-23	User access can be integrated with Microsoft Active Directory.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
03-SEC-24	Software offers security features to grant/deny access to software functions for each user to the menu level. System provides user definable security supporting the restriction of access to system functions at the screen and function level.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>FINANCIAL PROCESSING FEATURES/DETAILS</b>				
04-FIN-01	Transactions made in person and online are in real-time.	Required		
04-FIN-02	The system can issue refunds electronically for any type of payment that originated with the system (deposits, etc.)	Required		
04-FIN-03	System allows online payment of services; currently due and advance payment, 24/7/365; and payments posted the interfaced system as a completed transaction.	Required		
04-FIN-04	Software will produce customer invoices with sequential invoice numbers.	Required		
04-FIN-05	Software will track income and revenue for each module's package type, broken down by individual fee charged, adjustments, and net revenue.	Required		
04-FIN-06	Software allows collection of payments by cash, check, credit card, or gift certificate.	Required		
04-FIN-07	Allow for refund processing of activity registrations, memberships, and deposits.	Required		
04-FIN-08	Auditors should be able to trace every transaction back to its source within the system.	Required		
04-FIN-09	Authorized users can run end of day deposit reports for each terminal.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
04-FIN-10	Credit Card Number, CVV or PIN credit card data is not retained once a transaction is complete.	Required		
04-FIN-11	System will track and record deposits from activities, memberships, and rentals.	Required		
04-FIN-12	Software automatically calculates the cost of activities as participants enroll. These fees may be overridden with proper security/authorization.	Strongly Preferred		
04-FIN-13	Incomplete payments can be accepted including "split" payments with part from credit card and part from gift card, etc.	Required		
04-FIN-14	Integrated credit card processing with EMV standards. Integrate with ELAVON and Worldpay.	Required		
04-FIN-15	Ability to view client transaction history.	Required		
04-FIN-16	Provide the ability to email receipts.	Required		
04-FIN-17	Provide the ability to reprint current receipts, and to easily search historical receipts and reprint or email them.	Required		
04-FIN-18	Facility rental price list allows unique charges for each facility and variable charges based on customer types such as resident, non-resident. Software will allow entry of multiple customer types.	Required		
04-FIN-19	Allow cancellation without providing a refund.	Required		
04-FIN-20	System should incorporate Generally Accepted Accounting Principles (GAAP), as it relates to Governmental Standards, in all modules. This includes, but is not limited to, internal controls, audit trail, revenue tracking, etc.	Preferred		
04-FIN-21	System shall accommodate cash basis, modified-accrual, and other accounting methods.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
04-FIN-22	The software will allow for entry of rental charge data into a facility rental price list. The price list will be used automatically to price charge new reservations, including hourly charges and deposits. New charges include fees for deposits, rental, customer type, facility use type, scaled fees, group size, date/time of use, and appropriate facility charges.	Preferred		
04-FIN-23	System should be configurable to limit the number of users who can flag GL accounts as taxable or non-taxable.	Preferred		
04-FIN-24	System is independent of the payment processor.	Preferred		
04-FIN-25	System is able to apply multiple GL accounts to any activity, rental, or membership.	Preferred		
04-FIN-26	Software must track revenue by room/facility or another user-defined subset.	Preferred		
04-FIN-27	Software can post adjustments to a customer's account balance.	Preferred		
04-FIN-28	Software allows designated fields to be mandatory to fill out.	Preferred		

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Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>WEB ACCESS - PUBLIC-FACING INTERFACE FEATURES/DETAILS</b>				
05-WEB-01	Web access registration must perform all functions as an operator assisted registration. This includes but is not limited to the following: <ul style="list-style-type: none"> <li>·Enforcement of all constraints</li> <li>·Gathering information required for specific activities</li> <li>·Interfaces with other modules for automatic update of information based on the function performed</li> <li>·Creation of client account</li> <li>·Completion of transaction with option to print waivers, confirmations and receipts</li> <li>·Online acknowledgement / signature for waiver</li> </ul>	Required		
05-WEB-02	The software must include a search capability to query different aspects of the website and return hyperlink results for easy navigation based on the search results. Search capability must allow users to query courses based on one or more of the following criteria: <ul style="list-style-type: none"> <li>·Location</li> <li>·Date</li> <li>·Time</li> <li>·Participant Age</li> <li>·Program Cost</li> <li>·Category</li> <li>·Keyword</li> </ul> Keyword searches must query entire parent and child activity title and description, and not be character limited.	Required		
05-WEB-03	The system must allow facilities, courses, memberships, etc., to be marked unavailable for web access or booking.	Required		
05-WEB-05	Software must utilize the information contained in the activity records to dynamically populate web pages for use in web-based activity registration.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
05-WEB-05	Software must be capable of displaying an activity and its corresponding description through direct entry of the activity number or by use of a hyperlink menu system.	Required		
05-WEB-06	The software must accept and verify credit card payments and issue receipts.	Required		
05-WEB-07	The software must accommodate linking directly to a parent and/or child activity, an activity type, activities occurring at a specific facility, or activities returned as part of a search.	Required		
05-WEB-08	The software (on both the administrative and customer side) must be responsive to different screen sizes and be fully functional on mobile devices.	Required		
05-WEB-09	Site will be customized to “look and feel” like our marketing website lakemetroparks.com.	Strongly Preferred		
05-WEB-10	System utilizes email address or other personal information for customer’s login ID (versus system generated number). Customer can customize their login ID and/or password.	Strongly Preferred		
05-WEB-11	The software must allow dynamic display of images associated with courses and facilities.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>ADMINISTRATION-FACING INTERFACE FEATURES/DETAILS</b>				
06-ADM-01	Ability to query on screen and view results.	Required		
06-ADM-02	All reports may be printed and/or viewed on-screen.	Required		
06-ADM-03	During enrollment, the receipt number is displayed on screen for recording on customer’s check even if the receipt is not printed.	Required		



Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
06-ADM-04	Provide on-screen view of participation reports/statistics.	Required		
06-ADM-05	Provide on-screen viewing for historical record of client registrations and financial information.	Required		
06-ADM-06	Provide on-screen viewing of class/ activity rosters.	Required		
06-ADM-07	Provide on-screen viewing of course descriptions.	Required		
06-ADM-08	Provide on-screen viewing of historical record of any transaction previously generated.	Required		
06-ADM-09	Provide on-screen viewing of reports, including financial reports.	Required		
06-ADM-10	Provide on-screen viewing of transaction receipt records.	Required		
06-ADM-11	Software allows inquiry by participant's name, and on-screen review of all registered activities current and historic.	Required		
06-ADM-12	User definable sort order for online viewing of class/activity lists.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>MASTER RECORDS FEATURES/DETAILS</b>				
07-MR-01	Maintain a master list of all rooms within a facility including occupancy limits and description of room.	Required		
07-MR-02	Maintain a master listing of all facilities available for class activities including a description, occupancy limits, address and directions.	Required		
07-MR-03	Maintain a master listing of all memberships.	Required		
07-MR-04	Maintain a master listing of all participants and family account information.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
07-MR-05	Maintain a master listing of classes/activities including detailed descriptions.	Required		
07-MR-06	Ability to revise notes, comment, etc. for each activity by season.	Required		
07-MR-07	Ability to update/revise master listings seasonally for any circumstances related to that season.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>CLIENT RECORDS FEATURES/DETAILS</b>				
08-CR-01	System participant data fields include all the following: ·First name ·Last name ·Address ·Multiple fields for phone numbers including area code ·Birthdate and auto-calculated age ·Residency status ·Text notes ·Email address(s) ·Email Communication Opt-Out	Required		
08-CR-02	System maintains a participant history file with emergency contact including name, telephone number, and relation to client	Required		
08-CR-03	System allows the client to create account online in real time.	Required		
08-CR-04	System allows the look up of current and past registrations or facility bookings for an individual	Required		
08-CR-05	System allows one person to register in multiple programs at the same time.	Strongly Preferred		
08-CR-06	System has the ability to apply payment to someone else's account. Third-party payment.	Preferred		
08-CR-07	System should have waivers with date range of when waiver has expired.	Strongly Preferred		
08-CR-08	System allows users to reset their own password	Strongly Preferred		

<b>Code</b>	<b>Questions/Description</b>	<b>REQUIRED or Preferred</b>	<b>Response</b>	<b>Vendor Response/Comments</b>
08-CR-09	System tracks participant records by individual, organization and household.	Preferred		
08-CR-10	System allows an individual person to be part of multiple accounts. For example, a child who is part of multiple households.	Preferred		
08-CR-11	System allows storage of multiple addresses for a client.	Preferred		
08-CR-12	System maintains participant liability waiver/photo waiver/release history.	Preferred		
08-CR-13	System allows searching for participants through use of bar code/magnetic stripe scan from ID card for Farmpark memberships.	Preferred		
08-CR-14	System can use GIS or other mapping tool to verify a customer's residency status.	Preferred		
08-CR-15	System allows customers view their program/activity and facility reservation history online	Preferred		

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Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>PROGRAMS/ACTIVITIES FEATURES/DETAILS</b>				
09-PA-01	Activity data fields are to include all of the following elements: <ul style="list-style-type: none"> <li>·Activity name</li> <li>·Category</li> <li>·Sub-Category</li> <li>·Instructor</li> <li>·Location – Park/Facility/Room</li> <li>·Activity Status (open, closed, canceled, etc.)</li> <li>·Start and End Date and time</li> <li>·Days of the week activity meets, number of weeks held.</li> <li>·Start Date and time for resident, non- resident and member registration</li> <li>·Registration cut-off date.</li> <li>·Minimum and maximum age by year school grade. enrollment levels</li> <li>·Text areas for catalog, receipt notes, and internal staff notes, supply lists</li> <li>·Calculation and storage of all session dates, times, and hours</li> <li>·Fee(s) by resident status and/or member status.</li> <li>·GL account(s) and amount/percent breakdown.</li> <li>·Facility for program/activity</li> </ul>	Required		
09-PA-02	System will be able to track multiple waivers per registration, including: <ul style="list-style-type: none"> <li>·Waiver of Liability</li> <li>·Photo Release waiver</li> </ul> Scanned copies of waivers, or verification of electronic signature for online waivers, can be attached to each registration. Waiver status can be modified after the registration is completed.	Strongly Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
09-PA-03	System will be capable of capturing data via custom forms (i.e. child information forms for camp programs, etc.). Custom forms can be developed by system administrators.	Strongly Preferred		
09-PA-04	The system will denote each activity that has a waiting list for easy identification when viewing an activity list.	Required		
09-PA-05	When interfacing with facility reservation module, the activity registration module will automatically calculate all activity session meeting dates and allow facilities to be scheduled and reserved as new activities are entered.	Strongly Preferred		
09-PA-06	Track clients waiting for a specific class or activity (wait lists)	Required		
09-PA-07	The system allows activities to be copied from one season to another and all data is transferable (e.g. – not solely days, times, locations but also custom questions assigned, receipt information, payment schedules, etc.).	Required		
09-PA-08	System will allow for registration of participants into activities offered in multiple seasons at the same time, such as registration in both late Summer and early Fall programs. Software does not require one season to be closed before starting another allowing simultaneous operation of multiple seasons.	Required		
09-PA-09	System allows new enrollment, refunds, adjustments, scholarships, transfers, wait list entries, credits (refundable and non-refundable) and voids.	Required		
09-PA-10	System maintains a description of all classes/activities offered.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
09-PA-11	System provides the capability to manually override/adjust any registration requirement or limit.	Required		
09-PA-12	System automatically checks and notifies the operator if there is a conflict with the attempt to enroll a participant into an activity.	Required		
09-PA-13	System operates simultaneously with and shares data with the Internet registration module to allow customers to register themselves into activities via the web.	Required		
09-PA-14	System will allow event series attendance to be entered for individual occurrences.	Required		
09-PA-15	System will assign categories and sub- categories to activities.	Required		
09-PA-16	System will assign the time of day and day of the week recreational activities are to meet.	Required		
09-PA-17	System will assign a location including building and room in which an activity will meet.	Required		
09-PA-18	System will allow a participant to be enrolled in multiple activities without having to reselect or re-input the participant's name each time.	Strongly Preferred		
09-PA-19	System will allow the transfer of clients from one section, class or activity to another with similar or different fees.	Required		
09-PA-20	System will allow staff to survey program participants automatically after a program is complete.	Required		
09-PA-21	System will allow special notes and prompts to be assigned to individual activities with a special enrollment notes screen automatically appearing during any enrollment in this activity.	Preferred		
09-PA-22	System will allow us to look up the classes offered by a certain age or age range.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
09-PA-23	System will indicate level of proficiency necessary for participation in recreation activities.	Preferred		
09-PA-24	System will identify activities that do not meet minimum registration limits and provide a mechanism to easily cancel the activity from the same screen.	Preferred		
09-PA-25	System will automatically indicate next client on the wait list of oversubscribed classes in the event of a cancellation or refund request by another client.	Preferred		
09-PA-26	System will allow for “retiring” of enrollment data and rosters at the end of a season to allow for easy setup of the software to handle the upcoming season. Retired data is stored in a historical file and is accessible for marketing purpose. <b>(Retiring should not be done automatically).</b>	Preferred		

Continued next page

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>FACILITY RESERVATIONS FEATURES/DETAILS</b>				
10-FR-01	Facility data fields are to include all of the following elements: <ul style="list-style-type: none"> <li>·Facility Name</li> <li>·Facility Type</li> <li>·Address</li> <li>·Day and evening phone</li> <li>·Area default usage type by predefined time slots</li> <li>·Opening and closing times by day of the week</li> <li>·Opening and closing times by season</li> <li>·Rental times (independent from open/closing times, e.g. – space open 9am-8pm but rental options are 9am-12pm, 1pm-4pm, and 5pm-8pm).</li> <li>·Overlapping facilities and facility attributes</li> <li>·Text facility notes</li> <li>·Default Use permit disclaimer</li> <li>·Custom contract form to use</li> <li>·Minimum reservation time</li> <li>·Closure information (holidays, maintenance, etc.)</li> <li>·Maximum capacity</li> <li>·Features/amenities</li> <li>·General ledger account(s) and amount/percent breakdown.</li> <li>·Fee(s) by resident status</li> </ul>	Required		
10-FR-02	System enables all the following: <ul style="list-style-type: none"> <li>·Entry of new reservations</li> <li>·Generate permit contracts</li> <li>·Generate payment receipts</li> <li>·Prevention of facility double booking</li> <li>·Book a rental at a time a program has space reserved</li> </ul>	Required		
10-FR-03	System handles 24 hours, overnight, and multiple day reservations.	Required		



Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
10-FR-04	System produces a reservation master report, including all the following options and data elements: ·All reservations for a specific center ·All reservations for a specific facility; meeting room or ball field ·All reservations for a specific date range ·All reservations for a specific customer ·Combinations of the above	Strongly Preferred		
10-FR-05	System produces graphical usage calendars, in monthly, weekly, and daily format. These calendars can be printed or viewed on-screen. Usage calendars should include reservations, programs/activities, and administrative bookings.	Strongly Preferred		
10-FR-06	System to produce a facility event set-up report for the maintenance staff, which includes all facility use for a selected date range and includes set-up instructions.	Strongly Preferred		
10-FR-07	System provides a user-configurable on- screen scheduling calendar, which displays existing reservations and allows “point and click” selection (via mouse) of new dates and times to reserve.	Strongly Preferred		
10-FR-08	System will allow reservations to be processed for up to 1 year in the future.	Required		
10-FR-09	System shows map of facility location, photos of facility, floorplans, and ability to add links to more information about facility and/or access directions or other information.	Strongly Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
10-FR-10	System to allow entry and storage of standard set-up instructions, which can be individually stored and customized for each type of facility. When a reservation is processed, the software will allow attachment of standard setup instructions, and allow entry of specialized or custom set-up instructions.	Strongly Preferred		
10-FR-11	System will search and display for multi- day or multi-facility reservations.	Required		
10-FR-12	System to notify a user or participant if there is a conflict with the time attempted to reserve.	Required		
10-FR-13	System can handle 24-hour reservations and overnight reservations.	Required		
10-FR-14	System should allow for accounting separation of damage deposit and down payments. The two are often handled differently and it would be easier to track.	Required		
10-FR-15	System includes text areas for facility description, receipt notes, internal staff notes, etc.	Required		
10-FR-16	The system will allow reservations to be processed for individuals, companies or both. If a company is used, the system will allow entry of contact persons.	Required		
10-FR-17	System will allow any staff with the appropriate access to enter a facility reservation.	Required		
10-FR-18	System will allow contracts to be amended or cancelled.	Required		
10-FR-19	Facility reservations may be entered by the staff person that has access to that center or facility.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
10-FR-20	Online system can accommodate electronic signatures for waiver/contract acceptance. Waivers/contracts can be different depending on the facility.	Strongly Preferred		
10-FR-21	On-screen scheduling calendar is user- configurable by view by day, by week, or by month at a glance. Time increments in the scheduling calendar may be set as low as 30-minute increments up to 2-hour increments.	Strongly Preferred		
10-FR-22	System allows for default charges to be entered for facility types and customer types. Charges can also be designated for individual facilities.	Required		
10-FR-23	System provides reservation permit to be emailed and printed as PDF files.	Required		
10-FR-24	System must produce reservation permits on demand.	Required		
10-FR-25	System prevents double bookings\conflicts, but can be overridden.	Required		
10-FR-26	System to produce a facility statistics report, with all the following elements: <ul style="list-style-type: none"> <li>·Facility type</li> <li>·Facility name</li> <li>·Total days available</li> <li>·Total hours available</li> <li>·Total days reserved</li> <li>·Total hours reserved</li> <li>·Usage percentage by day</li> <li>·Usage percentage by hour</li> <li>·Attendance/participation</li> <li>·Breakdown by usage type (program/activity, rental, administrative booking, etc.)</li> <li>·Revenue by usage type</li> </ul>	Preferred		
10-FR-27	System tracks setup and cleanup times separate from rental times.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
10-FR-28	System to track event name and number of person attending for each reservation. After the reservation is completed, the event name is displayed in the scheduling calendar.	Preferred		
10-FR-29	System allows recurring reservation of facilities	Preferred		
10-FR-30	Fees can be configured in units of measure per booking or per hour, with 30-minute increments being calculated for hourly rates within the system.	Preferred		
10-FR-31	System allows the option to rent an entire facility without having to select each individual room or part of a park.	Preferred		
10-FR-32	System includes a Facility Reservation wait list.	Preferred		
10-FR-33	System allows entry and management of multiple centers, facility types, and facilities. System can search for facilities based on any one or combination of parameters.	Preferred		
10-FR-34	System allows multiple facilities to be rented by a single customer in one step, without requiring duplicate data entry.	Preferred		
10-FR-35	System allows reservation inquiry by person, organization, company or facility name, and provides printed reports or on- screen review of all reservations.	Preferred		
10-FR-36	System allows searching for unique keywords within specific facilities, such as searching meeting rooms by also being able to specify that the desired room must have a projector and projection screen	Preferred		
10-FR-37	System will eliminate charges associated with an individual reservation due to rain- out but maintain the reservation on the facility calendar.	Preferred		

Code	Question/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>MEMBERSHIP (FARMPARK MEMBERSHIP) FEATURES/DETAILS</b>				
11-MM-01	Membership data fields are to include all the following elements: <ul style="list-style-type: none"> <li>·Mem. Package number</li> <li>·Mem. Package name</li> <li>·Variety of mem. Package fees</li> <li>·Discount</li> <li>·Package Description</li> <li>·Duration</li> <li>·Fees</li> <li>·General ledger account(s) and amount/percent breakdown.</li> <li>·List of family members on mem.</li> <li>·If gift mem. – when gift status expires and can communicate with recipient</li> <li>·If gift mem. – contact information for gift-giver</li> <li>·Ability to calculate charge for additional children; ex: adding more than 5 kids to family+2 mem., each additional child will be \$x/year</li> </ul>	Required		
11-MM-02	System allows customers to purchase and renew membership packages online.	Required		
11-MM-03	System settings can enable/disable availability of specific membership packages to be open for sale or renewal online	Required		
11-MM-04	System includes text areas for membership description, receipt notes, internal staff notes, etc.	Required		
11-MM-05	System is compatible with creating membership cards with barcodes, using equipment that is either in place or optionally available.	Strongly Preferred		
11-MM-06	System produces a visual and audio warning if a scanned membership card is invalid.	Strongly Preferred		
11-MM-07	System supports manual keyboard input member information in case of scanner failure.	Required		

<b>Code</b>	<b>Question/Description</b>	<b>REQUIRED or Preferred</b>	<b>Response</b>	<b>Vendor Response/Comments</b>
11-MM-08	System produces renewal and non-renewal reports.	Required		
11-MM-09	System produces reports for membership rosters of various membership packages.	Required		
11-MM-10	System produces revenue reports by membership package.	Required		
11-MM-11	System allows memberships to be renewed using the same/prior pass numbers Software supports use of existing membership cards and barcodes without re-issue, front desk or online.	Preferred		
11-MM-12	System allows pass numbers to be assigned to a customer either at the time of sale or at a later time.	Preferred		
11-MM-13	System is capable of interfacing with identification card production systems.	Preferred		
11-MM-14	System supports use of bar code scanning.	Preferred		
11-MM-15	System has ability to handle all aspects of the card production process including maintaining customer data, capturing digital images, encoding barcodes/magnetic stripes, and physical printing of the cards on site – hardware required is available through vendor.	Preferred		
11-MM-16	System is compatible with PC based cameras and membership card printers.	Preferred		
11-MM-17	When the bar code reader scans a membership card, it automatically verifies the card to be valid and updates the member's attendance record.	Preferred		
11-MM-18	System allows special discounts for Farmpark members.	Preferred		

Code	Question/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
11-MM-19	System has ability to track/report membership usage statistics through system's barcode/mag-stripe scanning station clients use to sign-in upon arrival (scanner verifies membership is valid, updates the member's attendance record and/or would remove a single visit if a punch card type).	Preferred		
11-MM-20	System has ability to generate gift renewal letters.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>MARKETING AND COMMUNICATIONS FEATURES/DETAILS</b>				
12-MKT-01	What email system do you integrate with, if any? How is the integration accomplished?	Question	N/A	
12-MKT-02	Ability to export activity/program information for use in brochure/catalog creation in rich text or plain text format. Must be able to export a Word document to our specifications. Desktop Publishing including: ·Activity and Course Title ·Activity and Course Description ·Start and End Date ·Start and End Time ·Days of Week ·Location (Facility and Room) ·Minimum and maximum # of participants ·Ages Export should be to a Word document, and have the ability to be customized.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
12-MKT-03	System can generate mailing labels and email lists to capture: <ul style="list-style-type: none"> <li>·Participants</li> <li>·Specific city or combination</li> <li>·Specific zip code or combination</li> <li>·Resident or non-resident status</li> <li>·Age</li> <li>·User Group</li> <li>·Specific activity or combination</li> <li>·Last registration date</li> <li>·Activity wait list status</li> <li>·Combinations of above</li> </ul>	Required		
12-MKT-04	Mailing list: System must allow mailing lists to be exported to a comma-delimited format with the following fields: <ul style="list-style-type: none"> <li>·Last Name</li> <li>·First Name</li> <li>·Address</li> <li>·Email Address</li> <li>·Participant ID Number</li> <li>·Mailing List Name</li> <li>·User-definable field(s)</li> </ul> Export must be compatible with Constant Contact	Required		
12-MKT-05	System gives customers ability to opt-in and opt-out of notifications.	Required		
12-MKT-06	System has the ability to import/export data in a variety of formats e.g. Excel, XML.	Required		
12-MKT-07	System is able to send out email reminders at a determined time for programs, rentals, etc.	Required		
12-MKT-08	System is able to utilize a variety of social media outlets for marketing.	Required		
12-MKT-09	The system must be Google Analytics enabled and be capable of recording a campaign code.	Strongly Preferred		
12-MKT-10	Mailing list: The system must provide a mechanism for individuals to opt out from all mailing lists, while still retaining an email address in the system.	Required		



Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
12-MKT-11	Mailing list: System supports the creation and tracking of an unlimited number of mailing lists.	Required		
12-MKT-12	Mailing list: System must allow an unlimited number of mailing lists to be associated with a facility, registration, or membership.	Required		
12-MKT-13	Mailing list functionality (i.e. ability to access email functionality, etc.) must be able to be restricted based on user security permissions.	Required		
12-MKT-14	Mailing labels and email lists can be produced for any individual or combination of rosters.	Required		
12-MKT-15	System web-interface is ADA-compliant.	Required		
12-MKT-16	System has ability to send notifications to customers from system in email or SMS/Text Message.	Preferred		
12-MKT-17	System-sent Email or SMS notifications can be sent immediately or scheduled for a future time/date.	Preferred		
12-MKT-18	System has the ability to preview draft of email or SMS text before sending.	Preferred		
12-MKT-19	System has the ability to create questions at time of enrollment such as "how did you hear about us?".	Preferred		
12-MKT-20	System integrates with social media (e.g. – customers can sign-in online through Facebook or share activities they registered for with friends, etc.).	Preferred		

Continued next page

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
<b>REPORTING AND PRINTING DETAILS/FEATURES</b>				
13-REP-01	General: The following reports standard within the system: <ul style="list-style-type: none"> <li>·Class Roster</li> <li>·Registration Receipt</li> <li>·Attendance</li> <li>·Class list</li> <li>·GL category</li> <li>·Facility schedule</li> <li>·Refunds processed</li> <li>·Course listing</li> <li>·Waitlist</li> <li>·Rental Receipts</li> <li>·By facility</li> <li>·Schedule of all facilities or classes for a week and/or month with notes</li> <li>·Voids/Cancellations</li> </ul>	Required		
13-REP-02	General: System produces all the following activity reports: <ul style="list-style-type: none"> <li>·Master report listing all activities, descriptions, dates, times, etc.</li> <li>·Report listing all activities and all text descriptions, notes, etc.</li> <li>·Under minimum enrollment report</li> <li>·Over maximum enrollment report</li> <li>·Full activity report</li> <li>·Activity totals and statistics (registered, attended, historical comparisons)</li> <li>·Facility usage by activities and sessions report</li> <li>·Participants by school, age, area, city, zip code, etc.</li> <li>·Resident and non-resident participation</li> <li>·Online vs front desk registration</li> </ul>	Required		
13-REP-03	General: Users can export the reports they are authorized to use to Excel.	Strongly Preferred		
13-REP-04	General: System allows end users and/or system administrators (via role-based permissions) to create custom reports for use by defined system users.	Strongly Preferred		
13-REP-05	General: System produces daily activity report.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
13-REP-06	General: Daily, monthly, and yearly reports can be specified by date range, starting and ending receipt numbers and starting and ending gift certificate numbers, etc.	Strongly Preferred		
13-REP-07	General: All reports can be previewed on screen, printed, saved to file, or output as Excel spreadsheet, HTML, or PDF files.	Strongly Preferred		
13-REP-08	General: All reports can be emailed, with file attachment option, directly from the system.	Strongly Preferred		
13-REP-09	General: Ability for users to execute standard reports.	Required		
13-REP-10	General: Ability for user to create ad-hoc queries and reports with the ability to save these for future use.	Strongly Preferred		
13-REP-11	Financial: System will produce and print all the following "End of Day" reports: ·Net Revenue by summary, by revenue account ·Receipt payment report, listing all receipts processed, payment type, and totals ·Payment distribution summary, showing all payment distributions ·Account transfer report, showing funds flow among revenue accounts ·Financial summary for "at a glance" executive review	Required		
13-REP-12	Financial: System will produce customer invoices and/or statements.	Required		
13-REP-13	Financial: System produces summary and detail income, expense, and net revenue reports. Each of these reports can be sorted by activity, location, season (quarter/trimester), category (program area) or revenue account.	Required		
13-REP-14	Financial: System produces refund report, showing all refunds for a specified date range.	Required		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
13-REP-15	Financial: System produces net revenue reports, including a summary or detail format, and sorted by facility, center, or revenue account.	Required		
13-REP-16	Financial: System is able to print receipts and reports on plain/ standard paper.	Required		
13-REP-17	Financial: System produces a detailed report about transaction history over a user-defined time-period.	Required		
13-REP-18	Financial: Print cash transaction report and receipts.	Required		
13-REP-19	Financial: Provide the ability to print month-end and season/ quarter/ trimester summary of financial records.	Required		
13-REP-20	Financial: System produces a refund report showing all refunds for a specified date range, center, or facility.	Required		
13-REP-21	Financial: System produces monthly and yearly reports like the End of Day reports.	Required		
13-REP-22	Programs: Print or view activity program descriptions.	Required		
13-REP-23	Programs: Print or view activity/section rosters.	Required		
13-REP-24	Programs: Print wait list reports.	Required		
13-REP-25	General: System has a scheduler that allows reports and exports to be scheduled automatically and emailed to one or more individual or group email accounts.	Preferred		
13-REP-26	General: Provide for customized agency logos to be printed on forms and reports without the use of pre-printed forms.	Preferred		
13-REP-27	General: Display statistics using graphics representations (i.e., pie charts, bar graphs).	Preferred		
13-REP-28	Financial: Software produces reports of all deposits coming due.	Preferred		

Code	Questions/Description	REQUIRED or Preferred	Response	Vendor Response/Comments
13-REP-29	Participants: Software produces registration trend reports by user-defined criteria (i.e. 5-year registration trend data for summer day camps for a specific date).	Preferred		
13-REP-30	Participants: Compile and report statistics on the number and types of activities per session.	Preferred		
13-REP-31	Participants: System allows rosters to be sorted and printed by a variety of queries from data fields.	Preferred		
13-REP-32	Participants: System can produce batch printing of client mailing lists based on user defined criteria.	Preferred		
13-REP-33	Participants: Print activity attendance sheets.	Preferred		
13-REP-34	Facilities: System to produce reports of all centers, facility types, and individual facilities.	Preferred		
13-REP-35	Facilities: Print facility location descriptions.	Preferred		

End of Requirements and Questions by Category

# **INSTRUCTIONS TO OFFEROR**

## **RULES FOR SUBMITTING PROPOSALS**

- a. **Submittal Deadline:** Proposals must arrive in the Lake Metroparks Front Desk, 11211 Spear Rd., Concord Twp., Ohio 44077 by the Submittal Deadline shown in these specifications or subsequent addenda. Proposals may be submitted by hand, by courier, or any other method specified herein.
- b. **Responsibility:** Offerors are solely responsible for ensuring that their proposals are received by the Lake Metroparks in accordance with the solicitation requirements, before Submittal Deadline, and at the place specified. The Lake Metroparks shall not be responsible for any delays in mail or by common carriers or by transmission errors or delays or mistaken delivery. Deliveries made before the Submittal Deadline but to the wrong Lake Metroparks office will be considered non-responsive unless re-delivery is made to the office specified before the Submittal Deadline.
- c. **Extension of Submittal Deadline:** The Lake Metroparks reserves the right to extend the Submittal Deadline when it is in the best interest of the Lake Metroparks.
- d. **Facsimile Transmissions:** Proposals may NOT be submitted by facsimile, unless otherwise specified herein.
- e. **Late Proposals:** The Submittal Deadline IS FIRM. Proposals will NOT be accepted after the Submittal Deadline and will be returned to the Offeror unopened.
- f. **Signature:** To be considered for award, each proposal shall be signed by an authorized representative of the Offeror.
- g. **Sealed Proposal:** Proposals MUST BE sealed upon submittal (e.g., sealed envelope, package, box, etc.)

## **DOCUMENTS TO BE RETURNED WITH PROPOSAL**

Failure to completely execute and submit the required documents before the Submittal Deadline may render a proposal non-responsive. The documents that must be returned by the Submittal Deadline are listed in the section entitled "Proposal Forms", "Proposal Format", and "Proposal Checklist".

## **PROPOSAL CONTENT**

Offeror must describe in detail how he will meet the requirements of this RFP and may provide additional related information with his proposal. The proposal should be presented in a format that corresponds to, and references, the sections outlined in the "Scope of Work" (Page 5) and "Proposal Format" (Page 39), and should be presented in the same order. Responses to each section and subsection should be labeled to indicate which item is being addressed.

Proposals should be straightforward and concise and provide "layman" explanations of technical terms that are used. Emphasis should be concentrated on conforming to the RFP instructions, responding to the RFP requirements, and on providing a complete and clear description of the offer. If a complete response cannot be provided without referencing supporting documentation, you must provide such documentation with the proposal indicating where the supplemental information can be found.

Proposals must include all proposed terms and conditions, including, without limitation, written warranties, maintenance/service agreements, license agreements, and lease purchase agreements. The omission of these documents renders a proposal non-responsive. Proposals, which appear unrealistic in the terms of technical commitments, lack of technical competence, or are indicative of failure to comprehend the complexity and risk of this contract, may be rejected.

The Lake Metroparks is not liable for any costs incurred by Offerors before entering into a formal contract. Costs of developing the proposals or any other such expenses incurred by the Offeror in responding to the

RFP, are entirely the responsibility of the Offeror, and shall not be reimbursed in any manner by the Lake Metroparks.

#### **PROPOSAL FORMS**

- a. Copies. One original and (2) copies must be submitted on or before the Submittal Deadline. Offerors shall submit one (1) original proposal marked "MASTER". Envelopes containing the original and the copies should be marked in accordance with the directions found elsewhere in these instructions.
- b. Discrepancies. If discrepancies are found between the copies, or between the original and copy or copies, the original "MASTER" will provide the basis for resolving such discrepancies. If one document is not clearly marked "MASTER", the Lake Metroparks reserves the right to use the original as the Master. If no document can be identified as an original bearing original signatures, Offeror's proposal may be rejected at the discretion of the Lake Metroparks.

#### **PROPOSAL FORMAT**

Proposals shall include the following items and be formatted in the following order:

1. Letter of Intent: Submit a written narrative of how you plan to meet the registration system needs outlined in the "Scope of Work" Section (Page 5).
2. Project Implementation and Training Plan; (Page 5)
3. Responses to the list of "Requirements and Questions by Category" listed in the "Scope of Work" (Page 5);
  - a. Licensing agreement;
4. Organization - see "Offeror's Background" Section (Page 42);
5. Similar Projects - Submit information on Similar Projects that your firm has completed. List specific types of experience Offeror has in the following areas:
  - a. Experience in working with local or regional park districts;
  - b. Experience in working with public agencies;
6. References – see "Offeror's References" Section (Page 43);
7. Current Status of Any Litigation - List the Current Status of Any Litigation or other major circumstances related to previous work performed that would be of concern to owner;
8. Pricing – Explain how pricing for services will be calculated and billed. Also include any anticipated fees or costs related to required hardware or software necessary to use your system;
9. "Non-Collusion Affidavit" (Page 44);
10. Additional Information - Include any additional information you feel will assist us in the evaluation of your firm's qualifications.
11. If Addenda are released, include an "Addenda Acknowledgement" (Page 46).

#### **PROPOSAL MODIFICATIONS**

Any Offeror who wishes to make modifications to a proposal already received by the Lake Metroparks must withdraw his proposal in order to make the modifications. Withdrawals must be made in accordance with the terms and conditions of this solicitation (see Withdrawal of Proposal – Page 39). All modifications must be made in ink, properly initialed by Offeror's authorized representative, executed, and submitted in accordance with the terms and conditions of this solicitation. It is the responsibility of the Offeror to ensure that modified or withdrawn proposals are resubmitted before the Submittal Deadline.

#### **WITHDRAWAL OF PROPOSAL**

Offerors' authorized representative may withdraw Proposals only by written request received by the Procurement Manager before the Proposal Submittal Deadline. After that time, Offerors may not withdraw their Proposals for a period of sixty- (60) days from the date of opening. At no time may the successful Offeror(s) withdraw his Proposal.

## **PROPOSAL OPENING AND RESULTS**

No Public Opening. Proposals will not be opened publicly but a list of the names of companies submitting proposals will be available within a reasonable time after the Submittal Deadline. Proposals will be made public and may be inspected at the time of award. *No other information will be released until after the award.*

- a. Postponement. The Lake Metroparks reserves the right to postpone the Submittal Deadline for proposals any time before the date and time announced in the Request for Proposals or subsequent addenda.

## **PROPOSAL PRICES, NOTATIONS, AND MISTAKES**

All prices and notations must be in ink or typewritten. Mistakes may be crossed out and corrections typed or printed adjacent to the mistake and initialed in ink by the person signing the Proposal. Prices shall be stated in units and offers made separately on each item. In case of conflict between unit prices and extended prices, unit prices will govern. Where there is a conflict between words and figures, words will govern.

## **PROPOSAL RECEIVED LATE**

Late proposals will not be accepted and will be returned to Offerors unopened.

## **PROPOSAL RESULTS**

It is not the policy of the Lake Metroparks to provide RFP until after an award has been made.

## **PROPOSAL SUBMITTAL**

Proposals should be clearly labeled and submitted in a sealed envelope or box bearing the name of the Offeror, RFP number, and Submittal Deadline. Offeror's authorized representative must properly initial any erasures or alterations of any kind. Proposals that contain omissions or improper erasures or irregularities may be rejected. Telephone, telegraphic, facsimile, electronic, and late Proposals will not be accepted nor considered unless otherwise specified herein. It is the responsibility of Offerors to see that their Proposals have sufficient time to be received by the Lake Metroparks Office before the Submittal Deadline (Page 40). The Lake Metroparks will not be held responsible for proposal envelopes mishandled as a result of the envelope or box not being properly prepared.

## **SUBMITTAL DEADLINE**

**Proposals must arrive in the Lake Metroparks Office Front Desk, 11211 Spear Rd., Concord Twp., Ohio, 44077, by 10:00 AM local time Tuesday, March 5, 2019.** The receiving time in the Lake Metroparks Office will be the governing time for acceptability of proposals. Proposals that do not arrive by the Submittal Deadline will be late and will be returned to the Offeror unopened.

## **PROPOSAL AND PROJECT TIMELINE**

- Request for Proposals released: February 5, 2019
- Proposal-related questions must be received by: 4:00 PM local time on Monday, February 18, 2019
- Proposal addendum (if needed) will be released between February 5, 2019 and February 27, 2019.
- Proposal Deadline: 10:00 AM local time Tuesday, March 5, 2019
- Tentative proposal review period: 10:00 AM local time Tuesday, March 5, 2019 to Wednesday April 3, 2019.
- Tentative contract award date: April 18, 2019 following the April Board of Park Commissioners Meeting
- Tentative project implementation deadline: In time for Spring 2020 program registration that begins in January 2020.



**ACCEPTANCE PERIOD**

Unless otherwise specified herein, proposals are firm for a period of ninety-(90) days.

**PROPOSAL, REJECTION OF**

The Lake Metroparks reserves the right to reject any or all Proposals or any part of a Proposal. The Lake Metroparks reserves the right to reject the Proposal of any Offeror who previously failed to perform adequately for the Lake Metroparks or any other governmental agency. The Lake Metroparks expressly reserves the right to reject the Proposal of any Offeror who is in default on the payment of taxes, licenses or other monies due the Lake Metroparks.

**AWARD OF PROPOSAL**

Award will be made to the Offeror offering the most advantageous proposal after consideration of all Evaluation Criteria set forth below. An Evaluation Committee will be established by the Lake Metroparks. The Committee will evaluate all proposals received in accordance with the Evaluation Criteria. The Lake Metroparks reserves the right to establish weight factors that will be applied to the criteria depending upon order of importance. The Lake Metroparks shall not be obligated to accept the lowest priced proposal, but will make an award in the best interests of the Lake Metroparks after all factors have been evaluated

**AWARD EVALUATION CRITERIA**

Evaluation Criteria that will be used to evaluate all proposals that are received are listed below:

<b>EVALUATION CRITERIA</b>	<b>PERCENTAGE</b>
Demonstrated competence	25
Ability to meet our list of system requirements	35
Qualifications and availability of key persons to be assigned to the contract resulting from this solicitation and financial stability of Offeror	10
Number of years of experience the Offeror has in this type of business, with accounts of this size and with similar system functionality. Experience in performance of comparable work and experience working with public agencies	5
Reasonableness of cost	15
Conformance with the terms of this RFP	10

The above percentages show the relative importance of individual criterion. The evaluation committee will use these criteria to score the proposals.

The Evaluation Committee may also contact and evaluate the Offeror's references; contact any Offeror to clarify any response; contact any current users of an Offeror's services; solicit information from any available source concerning any aspect of a proposal; and seek and review any other information deemed pertinent to the evaluation process. The Evaluation Committee shall not be obligated to accept the lowest priced proposal but shall make an award in the best interests of the Lake Metroparks.

Discussions may, at the Lake Metroparks sole option, be conducted with responsible Offerors who submit proposals determined to be reasonably susceptible of being selected for an award. Discussions may be for Proposal 2019-011 Request for Proposal for Registration System for Lake Metroparks  
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the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Offerors shall be accorded fair and equal treatment with respect to any opportunity for discussion and written revision of proposals. Revisions may be permitted after submissions and before award for obtaining best and final proposals. In conducting discussions, the Lake Metroparks will not disclose information derived from proposals submitted by competing Offerors.

Award is contingent upon the successful negotiation of final contract terms. Negotiations shall be confidential and not subject to disclosure to competing Offerors unless an agreement is reached. If contract negotiations cannot be concluded successfully, the Lake Metroparks may negotiate a contract with the next highest scoring Offeror or withdraw the RFP.

#### **AWARD SELECTION PROCESS**

Selection of qualified Offerors will be based on the Award Evaluation Criteria (Page 41). Additional questions may be asked of Offerors and interviews may be conducted during the proposal review period. Offerors will be notified of any additional required information or interviews after the written proposals have been evaluated.

Interviews may be held with the most qualified respondents. The recommended proposal will be submitted to the Lake Metroparks Board of Park Commissioners for contract approval. The Offeror selected will enter into a contract with the Lake Metroparks.

#### **EXPERIENCE AND COMPETENCY**

The Successful Offeror shall be skilled and regularly engaged in the general class or type of work called for under the contract. Each Offeror shall set forth his experience on the form entitled Offeror's Experience and submit it with his proposal. It is the intention of the Lake Metroparks to award a contract to an Offeror who furnishes satisfactory evidence that he/she has the requisite experience, ability, sufficient capital, and facilities to enable him to prosecute the work successfully and properly, and to complete it within the time specified in the contract. To determine the degree of responsibility to be credited to the Offeror, the Lake Metroparks will weigh any evidence that the Offeror has performed satisfactorily other contracts of like nature, magnitude, and comparable difficulty and comparable rates of progress. In selecting the lowest responsive and responsible Offeror, consideration will be given not only to the financial standing but also to the general competency of the Offeror for the performance of the work specified in the contract documents.

#### **OFFEROR'S BACKGROUND**

Offeror must provide a company profile. Information provided shall include:

- a. Company ownership. If incorporated, the state in which the company is incorporated and the date of incorporation.
- b. Location of the company offices.
- c. Location of the office servicing any Ohio account(s).
- d. Number of employees both locally and nationally.
- e. Location(s) from which employees will be assigned.
- f. Name, address, and telephone number of the Offeror's point of contact for a contract resulting from this RFP.
- g. Company background/history and why Offeror is qualified to provide the services described in this RFP.
- h. Length of time Offeror has been providing services described in this RFP. Please provide a brief description.
- i. Resumes for key staff to be responsible for performance of any contract resulting from this RFP.

Offeror must include in his proposal a complete disclosure of any alleged significant prior or ongoing contract failures, any civil or criminal litigation or investigation pending which involves the Offeror or in which the Offeror has been judged guilty or liable. Failure to comply with the terms of this provision will disqualify any proposal. The Lake Metroparks reserves the right to reject any proposal based upon the Offeror's prior history with the Lake Metroparks or with any other party, which documents, without limitation, unsatisfactory performance, adversarial or contentious demeanor, significant failure(s) to meet contract milestones or other contractual failures.

#### **OFFEROR'S REFERENCES**

Offerors should provide a minimum of three (3) references from similar projects performed for any local government clients within the last three years. Information provided shall include:

- a. Client name;
- b. Project description;
- c. Project dates (starting and ending);
- d. Technical environment;
- e. Staff assigned to reference engagement that will be designated for work per this RFP;
- f. Client project manager name and telephone number.

#### **OFFEROR IS SOLE POINT OF CONTACT**

The Successful Offeror will be the sole point of contact. The Lake Metroparks will look solely to the Successful Offeror for the performance of all contractual obligations which may result from an award based on this RFP, and the awarded Offeror shall not be relieved for the non-performance of any or all subcontractors.

#### **INFORMED OFFEROR**

Offerors are expected to fully inform themselves as to the conditions, requirements, and specifications before submitting proposals. Failure to do so will be at Offerors' own risk and they cannot secure relief on the plea of error.

#### **SUBCONTRACTOR INFORMATION**

If the proposal includes the use of subcontractors, Offeror must identify specific subcontractors and the specific requirements of this RFP for which each proposed subcontractor would perform services.

#### **SUBCONTRACTOR COMPETENCY**

The Successful Offeror will be required to establish to the satisfaction of the Lake Metroparks the competency, reliability and responsibility of the subcontractors proposed to furnish or perform the work described in the contract documents. Before the award of the contract, the Lake Metroparks will notify the Offeror in writing if, after due investigation, the Lake Metroparks has reasonable objection to any proposed subcontractor. If the Lake Metroparks has reasonable objection to any subcontractor, the Offeror shall submit an acceptable substitute person to Lake Metroparks.

Persons and entities proposed by the Offeror to be used as subcontractors, and to whom the Lake Metroparks has made no reasonable objection, must be used on the work for which they were proposed and shall not be changed except with the written consent of the Lake Metroparks.

#### **SUBCONTRACTOR REFERENCES**

For all subcontractors that will be used on this project, Offerors must provide a minimum of *two* references from similar projects performed for any local government clients within the last *three* years.

Information provided shall include:

- a. Client name;
- b. Project description;
- c. Project dates (starting and ending);
- d. Technical environment;
- e. Staff assigned to reference engagement that will be designated for work per this RFP; and
- f. Client project manager's name and telephone number.

#### **DISQUALIFICATION OF OFFEROR**

If there is reason to believe that collusion exists among the Offerors, the Lake Metroparks may refuse to consider proposals from participants in such collusion. No person, firm, or corporation under the same or different name, shall make, file, or be interested in more than one proposal for the same work unless alternate proposals are called for. A person, firm, or corporation who has submitted a sub-Proposal to an Offeror, or who has quoted prices on materials to an Offeror, is not thereby disqualified from submitting a sub-Proposal or quoting prices to other Offerors. Reasonable ground for believing that any Offeror is interested in more than one Proposal for the same work will cause the rejection of all Proposals for the work in which an Offeror is interested. If there is reason to believe that collusion exists among the Offerors, the Lake Metroparks may refuse to consider Proposals from participants in such collusion. Offerors shall submit as part of their Proposal documents the completed Non-Collusion Affidavit provided herein.

#### **NON-COLLUSION AFFIDAVIT**

Offerors are required to submit a Non-Collusion Affidavit with their Proposals.

#### **PRICES**

All Proposals shall give the prices proposed, both in writing and in figures, shall give all other information requested herein, and shall be signed by the Offeror's authorized representative.

Proposal prices shall include everything necessary for the fulfillment of the contract including but not limited to furnishing all materials, equipment, tools, facilities and all management, superintendence, labor, services, taxes, licenses and permits required to complete the work in accordance with the contract documents, except as may be provided otherwise in the contract documents. In the event that there is more than one proposal item in the proposal schedule, the Offeror shall furnish a price for all proposal items in the schedule, and failure to do so will render the proposal as non-responsive and may cause its rejection.

#### **FIRM PRICE PERIOD**

Offerors' offer shall remain open and firm for a period of not less than ninety- (90) calendar days from the Submittal Deadline.

#### **OFFERS OF MORE THAN ONE PRICE**

Offerors are NOT allowed to submit more than one proposal.

#### **PRICE DISCREPANCIES**

If there is more than one item in a proposal schedule, and the total indicated for the schedule does not agree with the sum of prices of the individual items, the prices given for the individual items shall govern and the total for the schedule will be corrected accordingly. The Offeror will be bound by said corrections.

#### **CONTRACT**

##### **FORMATION OF CONTRACT**

Once preferred vendor has been selected, contract negotiations can commence.

## **EXECUTION OF CONTRACT**

The Successful Offeror shall execute the contract, including but not limited to signing all necessary documents and submitting all required bonds and/or evidences of insurance, within ten (10) days after approval by the Lake Metroparks Board of Park Commissioners. This approval will be conveyed in writing by the Purchasing Manager to the successful Offeror. One copy of the contract will be returned to the Offeror after the Lake Metroparks executes the contract. In case of failure of the Offeror to execute and return the contract and all required documents within the time allowed, the Lake Metroparks may, at its option, consider that the Offeror has abandoned the contract. Offeror agrees to commence work within ten- (10) working days after the date of the Purchase Order, to proceed with the work and fully complete the project.

## **INTERPRETATION OF CONTRACT DOCUMENTS**

If any person is in doubt as to the true meaning of any part of the specifications or other contract documents, or finds discrepancies or omissions in the specifications, he may submit to the Lake Metroparks a written request for an interpretation or correction. Requests for interpretations shall be made in writing and delivered to Elizabeth Mather, Lake Metroparks by mail at 11211 Spear Rd., Concord Twp., Ohio 44077, by facsimile to 440-639-9873, or by email at emather@lakemetroparks.com by 4:00 PM local time on Monday, February 18, 2019. The requesting party is responsible for prompt delivery of any requests. When the Lake Metroparks considers interpretations necessary, interpretations will be in the form of an addendum to the contract documents, and when issued, will be sent as promptly as is practical to all parties recorded by the Lake Metroparks as having received contract documents.

All such addenda shall become a part of the contract. Oral and other interpretations or clarifications shall be without legal or contractual effect. It is the responsibility of each Offeror to ensure the Lake Metroparks has their correct business name and address on file. Any prospective Offeror who obtained a set of contract documents from anyone other than the Lake Metroparks is responsible for advising the Lake Metroparks that they have a set of contract documents and wish to receive subsequent Addenda.

## **CONTRACT DOCUMENTS, EXAMINATION OF**

It is the responsibility of the Offeror to carefully and thoroughly examine and be familiar with legal and procedural documents, general conditions, all forms, specifications, drawings, plans, and addenda (if any), hereinafter referred to as Contract Documents. Offeror shall satisfy himself as to the character, quantity, and quality of work to be performed and materials, labor, supervision, equipment and appurtenances necessary to perform the work as specified by the Contract Documents. The failure or neglect of the Offeror to examine the Contract Documents shall in no way relieve him from any obligations with respect to the solicitation or contract. The submission of a proposal shall constitute an acknowledgment upon which the Lake Metroparks may rely that the Offeror has thoroughly examined and is familiar with the contract documents. The failure or neglect of an Offeror to receive or examine any of the contract documents shall in no way relieve him from any obligations with respect to the Proposal. No claim will be allowed for additional compensation that is based upon a lack of knowledge of any solicitation document.

## **SELL OR ASSIGN**

The successful Offeror shall not have the right to sell, assign, or transfer any rights or duties under this contract without the specific written consent of the Lake Metroparks.

## **TERMS OF THE OFFER**

Lake Metroparks acceptance of Offeror's offer shall be limited to the terms herein unless expressly agreed in writing by the Lake Metroparks. Proposals offering terms other than those shown herein will be declared non-responsive and will not be considered.

Offeror understands and acknowledges that the representations above are material and important and will be relied on by the Lake Metroparks in evaluation of the proposal. Offeror misrepresentation shall be treated as fraudulent concealment from the Lake Metroparks of the facts

## **ADDITIONAL DETAILS**

### **ADDENDA ACKNOWLEDGEMENT**

Each proposal shall include specific acknowledgment in the space provided of receipt of all addenda issued during the solicitation period. Failure to acknowledge may result in the proposal being rejected as not responsive.

### **AUTHORIZED SIGNATURES**

Every proposal must be signed by the person or persons legally authorized to bind the Offeror to a contract for the execution of the work. Upon request of the Lake Metroparks, any agent submitting a proposal on behalf of an Offeror shall provide a current power of attorney certifying the agent's authority to bind the Offeror. If an individual makes the proposal, his or her name, signature, and post office address must be shown. If a firm or partnership makes the proposal, the name and post office address of the firm or partnership and the signature of at least one of the general partners must be shown. If a corporation makes the proposal, the proposal shall show the name of the state under the laws of which the corporation is chartered, the name and post office address of the corporation and the title of the person signing on behalf of the corporation. Upon request of the Lake Metroparks, the corporation shall provide a certified copy of the bylaws or resolution of the board of directors showing the authority of the officer signing the proposal to execute contracts on behalf of the corporation.

### **REJECTION OF PROPOSALS, WAIVER OF INFORMALITIES**

The Lake Metroparks reserves the right to reject any or all proposals, or any part of a proposal. The Lake Metroparks reserves the right to reject the proposal of any Offeror who previously failed to perform adequately for the Lake Metroparks or any other governmental agency. The Lake Metroparks expressly reserves the right to reject the proposal of any Offeror who is in default on the payment of taxes, licenses, or other monies due the Lake Metroparks.

### **CANCELLATION OF SOLICITATION**

The Lake Metroparks may cancel this solicitation at any time.

### **COMPLIANCE WITH LAWS**

All proposals shall comply with current federal, state, and other laws relative thereto.

### **INDEPENDENT CONTRACTOR**

Contractor pledges that it presently has no interest, and shall not acquire any interest, direct or indirect, financial or otherwise, which would conflict in any manner or degree with the performance of the services hereunder. Contractor further pledges that, in the performance of this contract, no subcontractor or person having such an interest shall be employed. Contractor certifies that to the best of his knowledge, no one who has or will have any financial interest under this contract is an officer or employee of Lake Metroparks. It is expressly agreed by Contractor that in the performance of the services required under this contract, Contractor, and any of its subcontractors or employees, shall at times be considered independent Contractors and not agents of Lake Metroparks.

## **INK OR TYPEWRITTEN**

All information, prices, notations, signatures, and corrections must be in ink or typewritten. Mistakes may be crossed out and corrections typed or printed adjacent to the mistake and initialed in ink by the person signing the proposal.

## **DEFINITION OF TERMS**

For the purposes of this RFP, the following definitions will be used:

- a. **Contractor.** Same as Successful Offeror.
- b. **Evaluation Committee.** An independent committee established by the Lake Metroparks to review, evaluate, and score the proposals, and to recommend award to the Offeror that submitted the proposal determined by the committee to be in the best interest of the Lake Metroparks.
- c. **May.** Indicates something that is not mandatory but permissible.
- d. **Must/Shall.** Indicates a mandatory requirement. A proposal that fails to meet a mandatory requirement will be deemed non-responsive and not be considered for award.
- e. **Offeror.** The person or firm making the offer.
- f. **Preferred.** Indicates something that is not mandatory but permissible.
- g. **Proposal.** The offer presented by the Offeror.
- h. **Required.** Indicates a mandatory requirement.
- i. **RFP.** Acronym for Request For Proposals.
- j. **Should.** Indicates something that is recommended but not mandatory. Failure to do what "should" be done will not result in rejection of your proposal.
- k. **Strongly Preferred.** Indicates something that is not mandatory but that we would really like to have included if available.
- l. **Submittal Deadline.** The date and time on or before all proposals must be submitted.
- m. **Successful Offeror.** The person, contractor, or firm to whom the award is made.

## **NOMENCLATURES**

The terms Successful Offeror, Successful Contractor, and Contractor may be used interchangeably in these specifications and shall refer exclusively to the firm with whom the Lake Metroparks enters into a contract because of this solicitation.

## **TAXES**

Successful Offeror shall pay all federal, state and local taxes, levies, duties and assessments of every nature due in connection with any work under the contract and shall indemnify and hold harmless the Lake Metroparks from any liability on account of any and all such taxes, levies, duties, assessments and deductions.

## **QUESTIONS AND COMMENTS**

Questions and comments regarding this solicitation must be submitted in writing, either by email or mail Elizabeth Mather, Chief of Technology, Lake Metroparks, 11211 Spear Rd. Concord Twp., Ohio, 44077, [emather@lakemetroparks.com](mailto:emather@lakemetroparks.com) no later than 4:00 PM local time on Monday, February 18, 2019. The requesting party is responsible for prompt delivery of any requests. When the Lake Metroparks considers interpretations necessary, interpretations will be in the form of an addendum to the contract documents, and when issued, will be sent as promptly as is practical to all parties recorded by the Lake Metroparks as having received contract documents.

## **PROPOSAL CHECKLIST**

Proposals shall include the following items and be formatted in the following order:

- Letter of Intent: Submit a written narrative of how you plan to meet the registration system needs outlined in the “Scope of Work” Section (Page 5).
- Project Implementation and Training Plan; (Page 5)
- Responses to the list of “Requirements and Questions by Category” listed in the “Scope of Work” (Page 5);
  - Licensing agreement
- Organization - see “Offeror’s Background” Section (Page 42);
- Similar Projects - Submit information on Similar Projects that your firm has completed. List specific types of experience Offeror has in the following areas:
  - Experience in working with local or regional park districts;
  - Experience in working with public agencies;
- References – see “Offeror’s References” Section (Page 43);
- Current Status of Any Litigation - List the Current Status of Any Litigation or other major circumstances related to previous work performed that would be of concern to owner;
- Pricing – Explain how pricing for services will be calculated and billed. Also include any anticipated fees or costs related to required hardware or software necessary to use your system;
- “Non-Collusion Affidavit” (Page 44);
- Additional Information - Include any additional information you feel will assist us in the evaluation of your firm's qualifications.
- If Addenda are released, include an “Addenda Acknowledgement” (Page 46).

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End of RFP 2019-011