

YMCA Canada – Software Solutions RFI
Vendor Questions and Answers
July 24, 2015

1. Can you give more information on what the Master Services Agreement of YMCA Canada includes?

A: The Master Services Agreement currently envisioned will be established between the vendor and YMCA Canada. It will delineate, among other matters, the terms and conditions by which the software solution(s) will be licensed to Canadian YMCAs and supported by the vendor. Its content will be the subject of negotiation upon identification of a preferred vendor.

2. Are any of the current software solutions used by the YMCA integrated with other systems using APIs?

A: API integration is not currently in place but will be critical moving forward, in order to support future technology initiatives.

3. What information are you looking to retrieve / publish from APIs?

A: The information will depend on the specifics of the systems involved. A potential example would be the retrieval of program schedules to be published on public YMCA websites.

4. Do you have a timeline in place for the next steps following the RFI?

A: We expect to issue an RFP in the early fall, 2015.

5. Do you have any vendor qualification requirements (years in business, # of customers, employee count, Canadian office, YMCA customers, etc.)? For example, must the vendor have a Canadian office?

A: A Canadian office is not a requirement. We will consider all vendor qualifications but have not established minimum requirements at this time.

6. Will each individual affiliate make its own decision as to whether they want to adopt the new solution or will they be required to migrate to the new solution once the legacy system is retired?

A: Each Association will make its own decision subsequent to the completion of the procurement process and the presentation of its results to Associations' senior managers and/or governing bodies.

7. We sell access to our technology via user licenses. How many user licenses will YMCA of Canada (HQ) require?

A: The number of licenses will be determined on the basis of a vendor's definition of a "user" and the number of Associations that elect to implement the solution.

8. What is the range of staff users at each affiliate? Do 10 affiliates account for the most staff or is it relatively a consistent head count?

A: The number of staff ranges considerably from large Associations to smaller Associations.

9. Will Mistral Data Systems also be retired or will this be an option for each affiliate as well?



A: Each Association will make its own technology decision subsequent to the completion of the procurement process. There is no requirement to move away from the Mistral solution at this time.

10. We are a cloud solution, does data have to be hosted in CA?

A: No.

11. Will you require both front end member functionality and back end staff functionality be presented in French and English? Any other language requirements?

A: Canadian language laws will need to be acknowledged and accommodated by the preferred vendor in the most effective and efficient manner possible.

12. How many vendors do you envision being selected to receive the RFP?

A: There will be no limit on the number of vendors responding to the RFP.

13. Does YMCA of Canada have IT resources? If so, what type of IT support does it provide its affiliates?

A: Limited IT support is provided by YMCA Canada to individual Associations at this time.

14. Are all of the Canada YMCAs planning on switching to the company that submits the winning proposal?

A: Please refer to the response to question #6.

15. What is the average number of members per location?

A: The range of members among Associations varies, with larger member populations to be found in urban locations. As presented in the RFI, there are 2.3 million members/participants and 1,700 locations across the country. Additional statistics are available at the following link: <http://www.ymca.ca/en/resources-and-reports.aspx#YMCACanadaAnnualReports>

16. Our software platform as it currently exists will not satisfy all of the needs you require. However, we recently encountered a similar issue when bidding for another client. The key features our software did not have were developed and tested, and the software has since been rolled out. The ability for us to consider adding features the YMCA requires depends on how many facilities plan on migrating to the product should we prevail on the bid. The cost structure of the program will also need to be adjusted to account for that. Will the YMCA consider working with us to develop the features it requires?

A: Our strong preference is to minimize any custom software development. If customization is required, we anticipate working closely with the vendor(s) during the development process.

17. Do you need check in / check out solution to manage walk in swim clients and health club members?

A: Yes.

18. Is it expected that a successful vendor maintain an office in Ontario for the term of any engagement?



A: No.

19. Does section 6.3.2 imply that YMCA Canada will only sign a Master Services Agreement that is bound by the laws of the Province of Ontario?

A: Yes.

20. Will all supplementary agreements with individual YMCA Member Associations also need to be bound by the laws of the Province of Ontario?

A: Canadian provincial and federal regulations and laws constitute the legal framework for licensing agreements to be in place between member Associations and a vendor.

21. If the YMCA does progress to an RFP, will the RFP be directly provided to all RFI respondents or will it need to be obtained from MERX?

A: The RFP will be posted publicly (e.g., MERX) and will be sent to RFI respondents that indicate their interest in responding.

22. Can you describe YMCA's RFI/P review process? Specifically, how each vendor is scored, the selection criteria and review members and any expected dates for potential onsite presentations or reviews.

A: The RFI process is intended to inform the RFP process. Specific details related to selection and timing will be contained in the RFP document once issued.

23. Has the YMCA already identified specific applications outside of the RFI scope for integration points? e.g., financial or HRIS/payroll systems.

A: The specific requirement will be identified in the RFP, but it should be assumed that, at a minimum, integration with financial systems and public YMCA websites will be required.

24. Please describe the YMCA's preferred support model. e.g., all support requests, including requests from YMCA's members and site directors, are channeled through YMCA's existing support desk before escalation to vendor.

A: Support models currently vary across Associations. Our intention is to implement a consistent support model for all participating Associations as part of this initiative.

25. Did your existing "Class" application offer a complete solution for all the lines of businesses of YMCA-Canada? What are the limitations and pain points of the system?

A: The current Class application does not support all functionality requirements. Limitations vary across Associations.

26. Beside "Class" do you also plan to replace "Mistral" and implement a new SaaS based solution?

A: Please refer to the response to question #9.

27. Is one of the implementation scenarios to retain the current YMCA Memberships system while replacing the solutions for the business lines: Health/Fitness, Child Care and Camps? Or this project to replace all the systems?



- A: Retaining the current membership system is not a feasible option. The systems referred to in the question will need to be replaced.
28. We understand that YMCA Canada is interested in possibly implementing best of breed solutions, i.e. solutions provided by multiple vendors. For a vendor with a solution in one domain, do you prefer that vendor to suggest an independent partner who can provide solutions in the other domain or just focus on our own domain?
- A: We are open to considering any information that you believe will assist us in our assessment of what vendors may offer by way of solutions to meet the YMCA's needs.
29. What are the core features and functionalities you are looking for in Health/Fitness solution?
- A: Specific information will be provided in the RFP document.
30. What are the core features and functionalities you are looking for in Childcare solution?
- A: Specific information will be provided in the RFP document.
31. What are the core features and functionalities you are looking for in Camps solution?
- A: Specific information will be provided in the RFP document.
32. Do you also expect a staff scheduling and attendance management system for 22,000 staff across YMCA-Canada?
- A: This is not a current requirement.
33. Would you choose a solution that offers Open API access for Membership?
- A: Maximum flexibility regarding integration access will be considered to be an asset to any proposed solution.
34. If our payment solution is integrated with PCI Complaint Payment service providers where we don't collect or maintain any of the Credit Card information as they are maintained by our integrated payment service providers, do you still expect our solution to be PCI compliant?
- A: Yes.
35. Our solution has interfaces for Parents (Members) and Administrators (Location Directors, etc.). Do you expect both the solutions to be Smart Phone compatible?
- A: Yes.
36. YMCA Canada mentioned about minimal customization requirements from the solution. Can you please give an example for that?
- A: Our strong preference is to minimize any custom modifications of existing off-the-shelf software that would be required prior to implementation at Canadian YMCAs. We expect solutions to be configurable to avoid significant customization requirements.



37. Do you expect the solution to have an integrated Business Intelligence reporting? If so, would you prefer to have them all customized and created by the administrators (self creation of reports) or do you want us to customize every report and provide the access to your administrators?

A: Both standard reports and the ability to create ad hoc user reports would be preferred.

38. Do you plan to launch this new SaaS based solution for all the Child care centers and camps?

A: Yes, but this will depend on the number of Associations that elect to implement the solution.

39. YMCA Canada expects the new solution to be launched by the Q2 of 2017. You mentioned that the "custom solution" can also be suggested. If we propose a custom solution for membership management, do you expect us to develop a solution that should go live in Q2 2017? If so, when do you plan to award the contract to the selected vendor?

A: Yes. Our intention is to select a preferred vendor(s) during Q4 2015.

40. Your document mentions federal and provincial language laws regarding English and French. Does this mean the software needs to be able to render in the French language?

A: Please refer to the response to question #11.

41. Your document also mentions "Full PCI Compliance". What level of PCI compliance do you require?

A: Based on the number of annual transactions, YMCA Associations fall into either PCI compliance level 3 or level 4.

42. I need to know what kind of integration you require with payment solutions. Do you require payment information (credit card, bank account) to be stored in the system, or will a third party hosted payment solution be acceptable?

A: Our main concern is that any solution is fully secure and PCI compliant.

43. Do you envision a single payment interface for all the components of your solution (daycare, camp, fitness, memberships, etc.) or will each component include its own payment interface? Or do you already have a payment interface that you would like to use to accept payment for all these components?

A: We are currently in the process of selecting a single provider for all payment processing transactions. Our expectation is that the selected provider would be engaged for all components of the solution.

44. Can you provide a list of solutions (other than Class) that are used currently or planned to be used to support the Operational needs of the YMCA's (I.e. Raiser's Edge)?

A: A brief inventory of solutions used currently by Canadian YMCAs will be included in the forthcoming RFP.

45. Is the expectation that the staff side and consumer portal piece of the application be in both French and English?

A: Please refer to the response to question #11.



46. Are services expected to be provided in both official languages?
- A: Please refer to the response to question #11.
47. Can you provide a list of participating member associations who would be implementing by 2017? Are there any specific exclusions?
- A: Please refer to the response to question #6.
48. Will a solution running in a private cloud environment be acceptable in place of a Web-Based Solution?
- A: We will not eliminate this solution from consideration, but a web-based, SaaS solution is preferred.
49. We can offer either a SaaS solution or an ownership solution and still run in the cloud. Are those options acceptable?
- A: A web-based, SaaS solution is preferred.
50. Accessibility on all platforms. All platforms are available, but not all functionality lends itself to practical usage on a mobile platform. Is that acceptable? Example would be running drafts, End of days, setting up programs, etc. are not always practical to accomplish on a smart phone.
- A: We understand that there may be some practical limitations to full mobile access.
51. For the French bilingual requirement, is bilingual a support requirement or also a full software screen functionality requirement.
- A: Please refer to the response to question #11.
52. This is the second time an RFI/RFP has been issued by YMCA Canada. A final vendor had been selected and no contract was ever consummated. Were there technical reasons for the failure to come to an agreeable contract and if so, what were the technical hurdles?
- A: The reasons for not moving forward were not related to technical limitations.
53. For your Health, Aquatics and Fitness are you discussing registration?
- A: Registration is a critical component of YMCA operations, but multiple member registration solutions implemented in a single Association will not be considered.
54. In regards to CRM, we integrate with TRP. Is the TRP information what you are looking for?
- A: We are interested in learning about CRM solutions that can support multiple dimensions of a YMCA's operations and its relationships with members and others.
55. How many locations do you need our system to be setup at?
- A: That will depend on the number of Associations that elect to participate in implementing the solution. We expect the solution to be web-based for all YMCA locations.



56. You have 44 YMCA, 5 YMCA-YWCA. Do you need the software to be run in all these locations? Do you have the revenue, number of staff, members and number POS for each of these locations? (broken down by location)

A: Please refer to the response to question #55. Additional details will be provided in the RFP document.

57. Also 1500 childcare centres, 100 camps and 120 health, Fitness and aquatic centres. Do you need the software to be run in all these locations? Do you have the revenue, number of staff, members and number POS for each of these locations? (broken down by location)

A: Same response as for question #56.

58. What is the processing company you use today? Are you open to switch so someone who's already integrated to our solution?

A: Please refer to the response to question #43.

59. What objects and for what history do you want to do the data transfer?

A: We require the capability to transfer data as part of the migration process. Specific details will be determined based on the preferred solution(s).

60. Is there any other integration that you have in mind to do?

A: Please refer to the response to question #23.

61. Will YMCA Canada engage the selected vendor in a discovery phase to further define project scope and gain a deeper understanding of Y's needs and objectives?

A: Yes, as required.

62. Canadian GAAP accounting practices need to be looked at in which specific areas excluding AP and GL?

A: We expect that Canadian GAAP will be adhered to throughout the solution.

63. We have multi-level taxation, but need clarification on what areas are taxable and no-taxable as a non-profit.

A: Specific requirements will be provided in the forthcoming RFP. Presently, we are interested in learning whether a particular solution has that capability.

64. Does the entire system need to be written in French? If so, we do not have provisions to translate without assistance.

A: Please refer to the response to question #11.

65. The RFP document is quite light, will there be an additional release of requirements?

A: An RFP will be issued once the RFI process is complete.



66. It's our understanding that YMCA was quite deep into this procurement process with another vendor, is the intention to continue discussions with that vendor?

A: No.

67. Have you had any demos, diagnostics, or requirements review with other organizations?

A: Not as part of this RFI process.

68. Did any 3rd party organizations assist with this RFP?

A: No. Please note that this is an RFI. The RFP will be forthcoming.

69. Considering the implementation deadline of Q2 or Q3 2017, we would appreciate a sample of your timeline for this project. When do you expect to follow up on this RFI? After visiting with potential candidates, what will be the next steps and when will it be? When do you expect to make your final selection and award a contract?

A: Please refer to the response to question #39.

70. Could you elaborate on the deployment of this software solution? Is it centralized / per local association / per site?

A: We expect the solution to be cloud-based and accessed via the web by all participating Associations.

71. We would like a bit more information on your volumetric data. Can you list the names of the local associations and participating sub-division per province? ex.: YMCA Quebec.org, centers, number of members etc.-

A: Additional information will be provided in the RFP document.

72. In section 4/ page 4, you write that the most widely used system has been deployed in 39 Associations (Class). Will the deployment of this new solution be mandatory for all associations? Are you also replacing the Unison system?

A: Please refer to the response to question #9.

73. Does the Solution need to provide or handle Accounting Services (including Account Receivable, Purchase Orders, Accounts Payable, General Ledger, etc.)? Or does the Solution only need to integrate with YMCA's current Accounting software (please specify)?

A: Accounting functionality is not in scope. Integration with existing Accounting software will be required. Accounting software varies across Associations.

74. Does YMCA have harmonized policies for payment processing or do each member association and YMCA location have different policies?

A: Policies and procedures across individual member Associations are not harmonized. Please also refer to the response to question #43.

75. What type of payment should the Solution handle: Credit card, direct payment, Paypal/Blackbean?



- A: Principally, it should accommodate credit card and direct payments.
76. Is YMCA considering using open-source software such as the Drupal CMS?
- A: We are open to considering any solution that will meet our current and ongoing requirements.
77. What CRM does YMCA currently use?
- A: No CRM solutions are currently in use at the YMCA.
78. Does YMCA has a budget allocated to this project already?
- A: Yes. The budget will not be made public presently.
79. Has YMCA considered an order for integration of the different Associations within the new Solution?
- A: Not at this time.
80. We understand the Solution needs to integrate with YMCA's website and Associations websites. Does the project involve a Website Redesign?
- A: Website redesign is not in scope.
81. What system is the current YMCA website built with?
- A: Currently, each Association maintains its own website, and the underlying technologies vary.
82. Section 4 of your RFI: Scope of YMCA Requirements states: "A fourth line of business consists of a range of programs and courses offered by some, but not necessarily all, Canadian YMCAs. These include employment services and related programs, community-focused initiatives, and newcomer/immigration support programs." Is your 'Case Management' solution component required to support your above 'fourth line of business' exclusively, or are there additional areas of YMCA member agencies would require a case management solution?
- A: A Case Management solution is expected to be sufficiently flexible to accommodate a range of potential purposes and prospective uses, and will not necessarily be restricted to the "fourth line of business".
83. Please provide additional information regarding the YMCA's POS requirements. For example, does the need for POS include customer payment processing (e.g. Debit, Credit, Cash) at your facilities or other venues? Does this requirement extend to POS hardware (i.e., registers, payment terminals, etc.) at these facilities?
- A: Business and technical requirements will be identified in the forthcoming RFP. Presently, it will be helpful to have general information regarding a solution's POS capabilities.
84. Does the vision for the new software solution include an integrated online portal that will provide information and services to authenticated members or other patrons logged in to the system?
- A: Yes.
85. What is the expected call volume that the solution will be handling?



A: It is not anticipated that the solution will include a call centre component.

86. What is the amount of scope of work, outlined in Figure one page 4 of the RFI, in a percentage/functionality?

A: It is expected that a vendor will be capable of developing a Statement of Work based on its proposal.

