

## REPLACEMENT OF MEMBERSHIP DATABASE

### History of CLASS System

Our current system is called CLASS, after speaking with long term employees, our best guess is GVR has been using the software for at least 15 years.

GVR uses CLASS software to track memberships, tenants and guests; facility reservations; attendance; class and event registration and tracking.

Currently, two files are exported from CLASS; one for our accounting software and another for our membership card access software and member validation (DSX & club attendance).

### History of PerfectMind

PerfectMind – staff worked with PerfectMind for about three years with no success. After numerous attempts to migrate to the new software, we found it impossible to make the software work for our business model.

PerfectMind writeoff – GVR contacted 14 other companies/municipalities who were also using or attempting to use PerfectMind. Several of the companies we contacted had similar issues or larger concerns when they “went live”(e.g. data breach, financials not calculating correctly, pushing back go-live dates, issues with responsiveness, cancelled contract, etc.) GVR participated in a PerfectMind User Group for entities who were experiencing similar negative experiences with implementing the software. As far as we know, several have backed out of their agreements with PerfectMind, and at least one municipality filed a lawsuit. In the months since severing ties with PerfectMind, the company was sold.

### **Total e Integrated (Tel)** intro

- <https://totaleintegrated.com/>

### **Tel** features – we plan to utilize the **Tel** solution for

- property management
- membership management including LifeCare and CRCF residents
- invoice, statements, dues processing, assessing late fees
- Investor management – owners with multiple properties
- Accounting integration

**Tel** installation contract - services include:

- Installation, configuration, training, data migration, system integration (accounting, properties, membership), payment processing portals.
- contract is for use of the software and on call support.
- monthly charges are less than the current system.
- **Tel** has a verified track record of working with other systems to provide the best solution possible (see Sun City recommendations below).

### **Active Network (ActiveNet)**

<https://www.activenetwork.com/services/overview>

**ActiveNet** features— we will utilize **ActiveNet** solution for:

- room reservations and attendance
- class and event signup
- information and tracking of tenants from year to year
- guest cards
- tracking instructor payments

**Linkage** between the two systems – one data file (of active GVR Members) will be created daily. The data file created in **Tel** will list all active members and be imported into **ActiveNet** for the purpose of eligibility verification when registering members for events, classes or facility rentals. It will also be used for DSX verification (for gate and attendance readers).

This file is currently exported from Class and is used by several clubs for member verification – (tennis, computer club, camera club, clay studio, woodshop, lapidary). The file is also used by the DSX system for gate and attendance readers.

Both systems will export financial data into the accounting software daily. This process would be much the same as today; an excel spreadsheet is exported from CLASS and imported to the accounting system with no manual entry of financial data.

### **Implementation**

While most of GVR's recreation opportunities are shuttered, staff will be able to devote additional time for training, implementation and testing of the new systems. Taking the time to

perform extensive testing of integration with the accounting system and between the two solutions (**Tel** and **ActiveNet**) would be ideal.

**Tel** and **ActiveNet** are holding a training and implementation window for GVR. Time is of the essence with both vendors so we can get implementation with a targeted “go-live” date on their calendars.

### **Financial Information**

Tentative funding:

Additional Expense in 2020:

2 months subscription	\$14,568	(2 X \$7,284)
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2020 Expenses & Capital Items:

Capital Purchase NRC	\$147,684
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12 months depreciation	\$21,098
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If the project is not completed until January 2021, it will be part of our 2021 Non Reserve Capital budget. We could have the system up and running 4<sup>th</sup> Quarter of 2020 and expense the appropriate number of months subscription fees in 2020. The capitalization costs could be accumulated in Construction in Process through 12/31/2020 and transferred out of CIP and capitalized in 2021.

**Recommendation:** Fiscal Affairs Committee recommend the board of directors approve expenditure as indicated above for initial training and implementation of ActiveNet and Total e Integrated software solutions.

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Reviews:

### Sun City AZ

Located in **Sun City, Arizona**, this adult lifestyle community is home to over 40,000 residents and contains over 27,000 homes. The community features seven recreation centers, eight golf courses, five snack shops, two bowling centers, two full-service restaurants and one amphitheater. RCSC wanted to replace several separate systems that had no integration between them. The Total e Integrated solution provides RCSC a single centralized database to run their operations; a broad based HOA software platform that truly streamlines their operations.

The solution includes Microsoft Dynamics GP for accounting, web portals and CRM to improve their marketing strategies, a complete golf operations management platform for eight golf courses, property management software, facilities & activity management and membership management - all running in one integrated database.

"The Total e Integrated solution is the only system of its kind that is completely integrated. It is designed to help large and small communities centralize important data to streamline operations. The power of the Total e Integrated system is evident when you look at a large community like RCSC. We've been able to completely change the way they operate, saving them time and money along the way," says Mike Flannagan, President of Total e Integrated.

RCSC now has greater visibility into their operation which allows them quick and easy access to important operational data. They have also seen a great improvement in the use of employee time by having all of their member information in one centralized database.

"The Total e Integrated solution has improved the overall efficiency of our operations. We had very high expectations from the beginning and the Total e Integrated team, who are incredibly skilled and knowledgeable, certainly exceeded our expectations," says Chris Herring, Director of Support & Services for RCSC

### Sun City West, AZ

Sun City West is one of the largest master planned retirement communities for active adults developed by Del Webb featuring four 18 holes courses and three executive Par 60 courses, and one of the largest private facilities for recreation and creative activities in Arizona. Thousands of people from all 50 states, Canada and other countries call Sun City West home.

After an extensive and exhaustive search lasting six months, Total e Integrated's HOA software was chosen. Sun City West management invested well over 100 hours reviewing systems from over 30 vendors. Mike Whiting, General Manager for Sun City West says "We concluded that Total e Integrated was the best platform to handle the complexities of managing all of our recreational facilities and operational aspects of an active adult retirement community."

"Sun City West is a leader in active adult retirement community management and we are thrilled to be working with them," says Mike Flannagan, President of Total e Integrated. "They were looking for a single software platform that was seamless to better manage four key areas of their business - golf, member management, operations and finance."