GREEN VALLEY RECREATION, INC.

REQUEST FOR INFORMATION GVR-26-01

RECREATION OR ACCOUNT MANGEMENT SOFTWARE

Issued by: Green Valley Recreation, Inc.

1070 S Calle De Las Casitas
Green Valley, AZ 85614
Telephone: 520-625-3440

Issue Date: February 2, 2026

Submittal Due Date: March 2, 2026

GREEN VALLEY RECREATION, INC.

Request for Information (RFI)
Recreation and Account Management Software

Green Valley Recreation, Inc. ("Organization" or "GVR") is seeking information from qualified vendors that provide recreation management and/or account management software solutions. The purpose of this Request for Information (RFI) is to gather details regarding available products, features, implementation approaches, and general capabilities to assist GVR in evaluating potential software solutions for future consideration.

This RFI is issued for informational and planning purposes only and does not constitute a Request for Proposals (RFP), a solicitation for bids, or a commitment to procure services. Responses will be used to better understand the current marketplace and to inform potential next steps.

Copies of the RFI package, including background information and response guidelines, may be downloaded from the Organization's website at www.gvrec.gov. From the home page, hover over **About GVR**, click **Careers, Bids, Proposals**, and scroll down to **Bids & Requests**. Requests for printed copies may be directed to the Administrative Offices, 1070 S Calle De Las Casitas, Green Valley, AZ 85614, Monday–Friday, 10:00 a.m.–2:00 p.m. (telephone 520-625-3440).

Responses to this RFI should be submitted in electronic format, in accordance with the instructions outlined in the RFI document. Submissions should be clearly marked **Recreation and Account Management Software – RFI** no later than **March 2, 32026**.

GVR reserves the sole and absolute right to accept or reject any and all responses, in whole or in part, and to use or not use the information received, as determined to be in the best interest of the Organization.

The contacts for this RFI are:

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GVR – Introductory Information

GVR is hoping to find a single system solution for much of its business functions. We welcome follow up questions, examples of reports, suggestion for alternate workflows, and general pricing guidelines. We anticipate that a more detailed, formal RFP process will follow.

Overview of GVR

GVR is a 501(C)(4) nonprofit corporation located in unincorporated Pima County, Arizona and has as members about 80% of the residents in its boundary area. GVR uses multiple applications for its membership, reservations, leisure education, survey, club, and events functions. We are looking for a single system solution which covers our current needs and helps us in areas we would like to enhance. Below is an overview of current practices/requirements along with some enhancements we'd like to introduce.

GVR - Membership

GVR is comprised of 13,902 homes (this number will increase), with over 23,000 individual members who reside in residences where GVR membership is deeded to the property. Membership changes hands when property ownership changes - fees are associated with this (Membership Change Fee, Transfer Fee), and the fees can vary depending on whether ownership changed due to purchase, inheritance, or some other reason, so we need the ability to administrate multiple fees which reflect the circumstances of the ownership change; these fees are 'table driven' so that if the description of the fee changes this can be easily updated.

Currently, a "Main Contact" is the first person listed on title, Second Contact is the second. The annual dues will cover all those listed on title. Adding this membership to their account should generate a GVR# which will grant them access to the facilities via DSX, and grant member pricing on classes, events, etc. These are ongoing memberships. These will NOT be available for sale online, but members should be able to pay their annual dues online. If an account becomes past due, their access will be suspended. If there is a batch option to accomplish this, that is preferred.

Once a property is deeded into GVR, the property stays in that status in perpetuity and subsequent owners are responsible for all appropriate fees associated with membership. After the initial membership fee, annual dues are paid for each household – one per household. Dues are generally paid for the calendar year as a single amount due January 1; GVR does have a Dues Payment Plan (DPP) where members can split their annual dues into 12 monthly payments. New properties purchased mid-year will pay a prorated amount of dues, collected by the title company.

Currently, each household record contains one 'main contact' to whom annual dues renewal notices are sent; this is typically the first person listed on the deed. The 'main contact' is not necessarily an individual; it could be a trust or LLC. The household record contains the legal description of the property (subdivision/block/lot), a property archive number (e.g., SBL0019-0000-0045 709207 #255052) as well as a sub-division name, plus historical ownership/member information for all previous owner/members/account changes.

Certain residences within GVR's corporate boundary are not deeded into GVR; these owners have the option of deeding into GVR, with an accompanying fee, and if this takes place, the household stays deeded into GVR in perpetuity like any other GVR membership household. A similar 'new account' process takes place when a new home is constructed within GVR's boundaries and is deed into GVR.

Annual dues can be paid online via a payment portal which associates the payment to a specific household and which allows the payer to update only certain information (i.e. contact phone and email) and to pay only the amount due. Ideally, we would like to implement an option for members to include a donation with their dues payment that would be charged to a separate GL account. Members can donate to the Members Assistance Program (MAP) to assist neighbors or lower income households cover their dues. No other "*membership*" transactions can/should be completed online.

We need the ability to give members the option of an emailed annual statement in lieu of a mailed statement, plus the ability to print individual annual dues statements 'on demand', in addition to a complete annual printing of specially formatted statements which contain name, GVR number, property address, mailing address, and balance due information. We need the ability to run these statements only for those households current on their dues, to run statements which amalgamate multiple properties for owners of these, or to include past due and/or delinquent households if we choose.

GVR needs the ability to program 'due dates' for annual statements so that changes of status from active to suspended, adding monthly late fees and sending past due notices, and reporting longer term delinquencies to a collection agency (with historical statements) can be done in a batch process. Manual overrides of status changes and late fees must be available.

Most GVR members pay their dues by check and return the payment by mail. A user-friendly batch process for crediting membership accounts as payments arrive is essential. GVR assesses a 3% processing fee for credit card payments made online and in person. We would like to implement an ACH payment option for members an alternate fee-free payment option.

Various reports must be available, scheduled or on-demand, related to daily cash balances, new member fees, extra fees, refunds, a master list of all properties which can be run for all of GVR or by subdivision, lists of 'linked' accounts where an individual owns multiple households, daily cash receipts, monthly account status summaries/detail, etc.

GVR has an elected Board of Directors. So that only households where dues are current – there is one vote per household – are eligible to vote, we need the ability to create a list of eligible households with contact information for each.

The 'main contact' and whomever is listed on title for the property are issued membership cards at no additional cost. Additional membership cards, for residents of the property, can be purchased. Members also have the option of purchasing guest cards for single days, a week, or a rolling calendar year. When there is only one resident member, the guest card is an annual, complimentary card.

Members who rent their property can authorize Tenant Cards which (a) allow the tenant the same membership privileges the owner has, with an additional/variable fee which relates to the length of the tenancy is paid and (b) suspend the property owner(s) cards during the period of the tenancy. The start/end date of the tenancy is entered at the time the tenant card is purchased. When a tenant card transaction is entered, the individual is immediately eligible to purchase classes or event tickets at member prices in the same transaction.

Some members are 'Lifecare' members; these individuals are previous GVR property owners who now live in an assisted living facility in Green Valley. No initial membership fee is required, but annual dues are paid for each household with one or two 'Lifecare' members in residence.

Owner/members can also 'assign' membership privileges to another person without an additional fee; the owner has no membership privileges but it still responsible for the annual dues. A card is issued to the 'assigned member' and stays active until if and when the owner makes a change to this status.

A number of individuals own more than one GVR property. In these cases, the owner is responsible for the initial fees and annual dues for each property, but is issued only one membership card. GVR needs the ability to 'link' all the properties owned by an individual so that a comprehensive annual dues statement can be issued and one payment can be made that will apply the correct amount to each property owned.

The various fees/card types for initial membership, annual dues, tenants and guest cards, and various complimentary cards given to employees, contracted instructors, realtors, visitors, vendors and non-members who are taking a class are 'table driven' so that fees can be changed when needed and so that the card type issued is proper to the individual.

All member, guest, tenant, and complimentary cards contain a unique six-digit number (GVR Number) and are microchipped to allow entry to GVR facilities as well as tracking of each entry (via DSX.) Member and employee cards have the cardholder's photo on them, most other cards currently do not.

Search mechanisms for finding individuals should be name, address, phone, email, and GVR card number. A 'sounds like' mechanism for searching names would be helpful. Searches

should be able to be done for current accounts, retired accounts, or both. We also need the ability to completely delete accounts, retire accounts, or to merge accounts, when it's appropriate to do so.

All access and activities are based off of the GVR membership. GVR members have access to all of the facilities and amenities. Tenants will have the same access. Guests will have limited access to fitness centers, pools, and sport courts. There is a price difference between GVR members and non-members – non-members will pay a higher rate and have limited access.

GVR - Facilities & Reservations

GVR has 17 facilities, including one Facilities Building and one Administrative Building. Most facilities have at least one multi-purpose room in addition to a pool.

Over 100 locations can be reserved: auditoriums, multi-purpose rooms, kitchens, lobbies, exhibit areas, dedicated club spaces, decks and ramadas, swimming pools, tennis courts, pickleball courts, shuffleboard courts, bocce courts, and racquetball courts.

Some rooms can be reserved in combination on a single reservation transaction. A few reservations are paid, but most are not. Credit card payments are accepted via the system for applicable reservations and a receipt is emailed. Each reservation creates a record, with a permit issued electronically to the individual responsible for the reservation. A reservation may be for a single date, or for multiple recurring dates. Reservations cannot overlap times/locations without a warning issued and overridden. An audit trail must be present noting which system user made a reservation, and when it was made or altered.

We make reservations for three fixed periods each year: January thru April, May thru August, and September thru December. We need to have the flexibility to change these fixed periods if business conditions call for it. Reservations are prioritized in the sense that the GVR Board of Directors' reservations for corporate business come first, then paid leisure education classes and events, and so forth through eight different reservation types. A GVR employee enters all reservations so that this priority matrix is followed. These reservations are invariably for groups of members, not individual members.

Ideally, GVR would like to open up reservations for members to make directly, for some but not all reservable spaces, using a simple online feature, once the prioritized reservations are complete for a certain period. For example, prioritized reservations for January-April are typically complete by mid-December, after which members could utilize an online process to (a) reserve a room for a predetermined minimum and maximum period and (b) select from a small number of possible table/chair/equipment set up for the room. So that staff would have the opportunity to set up the room to the members' liking, these reservations would need to

be made at least 24 hours in advance, perhaps longer. These reservations will invariably be free.

Reservations have two sets of time durations: the time in which the individual/group will be using the room for their activity, and a period of time before and after this for setting up or taking down the room. These times are built into each reservation as the reservation is completed. For example, a class which runs from 9am to 11am might have 'set up time' from 8am to 9am and 'take down' time from 11am to noon. Set up and take down times are variable.

Information related to the individual person making the reservation, their contact information, and instructions as to how the location should be configured with tables, chairs, and other equipment is entered by GVR staff at the time the reservation is made and available to RSAs by means of a report which can be run/printed with variable date/location combinations. This report can be produced in pdf or excel formats for additional analysis.

Occasionally, rooms or even entire centers become unusable due to unforeseen circumstances. Thanks to the ability to visualize multiple locations' reservations on a single screen grid for a daily, weekly, or monthly basis, and the capability of easily going into a reservation record and updating the day, time and location, we are able to react quickly to these situations. This grid is color coded so that different reservation types – classes, meetings, etc. – are easily noted. We will want to retain this capability.

GVR - Leisure Education

GVR has a robust Leisure Education program which includes instruction in sports, arts and crafts, cooking, fitness and yoga, dance, and lecture style classes which have between one and fifty sessions. Some classes are free but most have a cost which varies from class to class. Individuals who are not GVR members are able to enroll in some, but not all, classes at a slightly higher cost and with a narrower registration window, both of which are flexible.

Classes are typically confined to a calendar month but some last multiple months. Each separate class has a system record containing a unique 'class number' along with:

- Dates, times, locations; these entries create a facility reservation. Classes may be at different locations on different dates so we must have the ability to program this either before the class begins or, when needed, after the class is underway.
- A class description. A spelling/grammar check is preferred.
- The class status – 'open' for classes open for enrollment, 'tentative' for classes being programmed for a subsequent season/catalog, 'cancelled' when appropriate, 'closed' when the class has completed all sessions, and 'date conflicted' when the class reservation overlaps with another room reservation.

- Registration fees and enrollment windows for members and non-members; typically, non-members will pay a little more and their registration window opens later. Additional fees for non-members are a separate entry with a separate GL code.
- Minimum and maximum enrollment counts with an option to override the maximum.
- Classification of the class by category/sub-category, using drop-downs. We need a table of categories/sub-categories which can be updated as needed and which contains a mechanism for setting up the order of the catalog download (see below). For example, the category 'Languages' might include sub-categories for German, Latin, and Spanish.
- Prerequisites for enrollment. A warning should be issued if a member enrolls for a class and the prerequisite isn't in their purchase history; this can be overridden.
- Notes that the instructor intends for field services staff who set up the location; i.e. table arrangement, room temperature and/or A/V needs.
- Three different fields where notes intended for individuals registering online, customer service staff performing the registration, and notes for the customer's receipt; these notes include 'things to bring' as well as drop-in fees. These notes change through the season as classes are moved to different locations and registrants can be alerted.
- Checkboxes related to whether the class will be included in the catalog, will appear online and allow online registration, allow a waiting list when the class is full, require a reason when an enrollee withdraws, whether enrollment closes after the initial class session, and, if enrollment can happen after the first session, how long of a window there is, and whether fees are prorated when enrollment happens after the first class.
- The instructor's name and the class supervisor's name. There can be up to three instructors attached to a class.
- An entry related to what percentage of the enrollment revenue is to be paid to each instructor (this percentage can vary); the revenue the instructors share is the basic class price, not including any additional fees non-members might pay.
- A check box noting if there is an additional list of materials which enrollees should purchase, this is often the case with art/craft classes. The list is held in the system and, once an enrollee purchases the class, the list is emailed automatically to them.
- Whether the instructor grants a discount if members enroll in multiple, related classes; for example, a yoga instructor who teaches three different classes might offer a $10 discount to members who enroll in two or three classes simultaneously; these discounts are programmed into applicable classes so that the discount happens automatically at the time of registration.

We need an option to call up a current class and 'copy' the class, then update dates, times, locations, etc. so that classes which repeat month after month can be easily entered; each time a class is 'copied' it creates a new, distinct class with a unique number.

We have three 'seasons' – January thru April, May thru August, and September thru December – but need the flexibility to change these as needed. A catalog is issued for each season, the process of which begins with an on-demand download of information related to each class – the description, dates and times, locations, fees, instructor name, and additional details related to supply fees and date interruptions which were populated into the system. This download should be available in text and spreadsheet format and the order must be related to the category and sub-category of classes; this order is driven by category/sub-category using a hierarchy built into the 'category/sub-category' table.

We issue 'Instructor Agreements' for each season using system generated PDFs unique to each instructor/class name; for example, instructor Jones might teach four sessions of Beginning Latin, four sessions of Latin 2, and two sessions of Latin 3 during the January-April term; we need the ability to generate three different PDFs, each of which contains the description, fees, location, dates and times, and for the three classes Jones is conducting. After the PDFs are created, we use an Adobe mechanism to amalgamate the files into a single agreement for which we use an e-sign capability to complete the agreement with the instructor.

Members can enroll into classes in an online function. Each member has a login (their GVR number); members set their own password. Registration can also be done in-person or by phone with customer service. Members cannot withdraw from classes online, a call to the customer service department is needed. The online function contains all the information included in the catalog but is formatted differently and searches can be made by category, or class number, or instructor.

Before the time comes for class registration for the season, typically the second Monday of the month prior to the season's beginning, but this can change, and after all class entries are completed and proofed, a batch mechanism changes the season's classes from 'tentative' to 'open' and classes appear in the online search. This happens before registration opens, so that members can place classes into their 'cart' and complete the transaction as soon as the enrollment window opens.

Non-members are allowed to register for classes by setting up a system login which is their email address. Non-member records appear on the system, with address/phone/email info, but are not noted as 'members' and therefore pay the higher enrollment fee and have the shorter enrollment window. Non-members can also register in person or by phone. There is none of the 'membership and dues' accounting associated with these records.

Tenants can enroll into a class and enjoy the (lower) member's fee during the period of their tenancy. Since the tenancy period is a range of dates held in the system when their tenant card

is purchased, it would be best that, if the tenant attempted to register for a class held after their tenancy period, they would be charged the higher, non-member fee.

Classes which are fully enrolled have an optional 'waiting list' where potential enrollees are placed in date order. If an enrollee withdraws from the class during the enrollment window, the customer service person performing the withdrawal is notified that there is an opening in the class so that the person on top of the waiting list can be contacted; if this person declines, customer service staff contact the next person in line, and so forth. Ideally, there would be a system record of these calls and their disposition. Additionally, it would be ideal if a notification was generated when a wait list exceeds the class maximum enrollment, at which time a separate class would normally be scheduled.

A record, separate from a GVR membership record, is set up for each instructor which includes name and contact information. . . Because instructors are attached to classes by means of a drop-down menu, it's necessary that the instructor record be set up before the instructor can be associated with a class. Instructor payment reports, with individual pages for each instructor noting the class number, dates, member and non-member fees paid, and instructor's information/payment %/amount, can be run individually, or for classes which 'closed' during ranges of dates.

Instructors also have an online presence where they can log into an account and see the registration levels for upcoming classes, pull up rosters which include names only, and communicate by email with registrants using a system mechanism which sends an email to every registrant without the instructor knowing the individual's email address. Instructors can provide supplemental materials such as lists of items to purchase, or additional reading, which can be stored in the system and attached to an email the instructor sends to enrollees. This is a separate function from the 'materials lists' noted earlier which are automatically sent to enrollees.

It would be good to have the ability to easily report an instructor's history on demand, this would include upcoming classes, classes completed, classes cancelled, class revenue, attendance, and the payment made to the instructor.

Some instructors allow 'drop-in' attendance. A separate 'class entry' is done for each of these instructors, by month, for each distinct per session fee that is charged. A few instructors charge different drop-in fees for different classes and have multiple drop-in class records for each month. At month end, the instructors turn in the funds collected from drop-in attendees and these monies are processed and attached to the class, after which a payment report is run which is similar to payment reports for standard classes.

GVR offers personal training to members using the same mechanisms as leisure education.

Class attendance sheets are provided to instructors, these contain each enrollee's name on the y axis of a grid which contains the class date(s) on the x axis. This report is produced in PDF format and either emailed to the instructor or provided in the classroom.

Other class listing options include a roster with contact information, or with enrollment details including purchase date/time/fee, in either PDF or Excel format.

Occasionally, classes are cancelled. In these cases, we need an easy way to generate refunds for all enrollees, preferably in a batch operation which results in a report listing each transaction as well as an email (using a template built into the system) letting enrollees know of the cancellation. Ideally, an option of sending a group text to enrollees in a cancelled class will be available. If some class sessions are held prior to cancellation, the refund is reduced.

Once a class finishes, we use a separate survey tool to email a survey to everyone who attended. It would be ideal if this process could be built into the system.

Events and Entertainment

GVR has a large events and entertainment program including concerts, dances, dinner shows, small free events, and tours. These are managed similar to the leisure education program with a few enhancements:

- We would like the ability to produce e-tickets for use at the event entrance.
- We need the ability for enrollees to purchase multiple tickets to an event in one transaction with a limit on the number of tickets purchased.
- We need the ability for enrollees to designate what type of meal they prefer (for a tour) or what type of meal and/or beverage they prefer (for a dinner show).

GVR - Clubs

GVR has 59 clubs covering arts and crafts, cards and games, dance, social functions, sports and special interests. Some clubs use space which is reserved by season, others have locations dedicated to the club activities and which cannot be reserved other than by the club.

We would like the ability for each member's record to contain which club(s) the member is currently part of. This would allow notification to a club when a member leaves GVR as well as regular reporting of club membership levels.

Additionally, a record for each club containing the names of current officers would be helpful.

If your system comes with a built-in website presence, we would like each club to have the ability to control the content on a website devoted to their club, but accessed directly from the main GVR website.

Sports clubs are currently maintaining court reservations for racket sports on their own, currently separate websites. We would like these reservations to be made on GVR's website so that a single member login could be used to reserve a tennis court in addition to purchasing event tickets, enrolling in a class, and joining a club.

GVR – Groups of System Users

GVR has a number of different user groups, each with major functions/capabilities:

- Membership staff maintains the membership records, including processing new members and the associated fees, annual dues payments, and associated reporting.
- Customer Service staff processes enrollments in classes/events.
- Reservations staff process room reservations, including rentals.
- Recreation staff set up classes and events as well as the catalogs and contracts.
- Field services staff use the reservation reports/reservation notes to prepare rooms for multiple uses.
- Finance staff draw information off the systems for their reporting.
- Facilities staff do not presently use our recreation systems but, if a system had an integrated work order module, might consider switching systems.

Each group has users with different levels of functionality and access associated with each individual's capabilities/responsibilities.

GVR – Summary

GVR is hoping to find a single system solution for much of its business functions. We welcome follow up questions, examples of reports, suggestion for alternate workflows, and general pricing guidelines.

Many thanks for your time and consideration.