**RFP 25-79415**

**ATTACHMENT F1**

**Scope of Work: Central Reservations Solution**

1. **INTRODUCTION**

The mission of the Division of State Parks (DSP) within the Indiana Department of Natural Resources (INDNR) is to conserve, manage, and interpret our resources while creating memorable experiences for everyone. Important tools to help carry out this mission include 1) a robust central reservation system that provides real-time transactions and data flow, allowing for a reservation, transfer or cancellation of a facility (i.e. campsite, cabin, shelter, etc.) in multiple sales channels, and 2) an integrated retail point-of-sale (POS) system that contains a detailed inventory tracking mechanism and reporting functionality. In addition to these two primary functions, INDNR seeks a Solution with a handful of additional integrated components that are essential to DSP operations.

The goal of this RFP is to establish a Contract with an experienced Supplier to provide a single, real-time, web-based Solution with comprehensive capabilities to integrate INDNR’s functionality requirements and our customers’ service expectations into one positive interaction. For example, a customer should be able to book a campsite, buy an annual entrance pass, and register for a guided hike or rent a kayak for their upcoming stay through a single traditional online shopping cart and payment experience. INDNR’s preference is to procure a developed commercial reservation system with integrated components (“Solution”) with dynamic options for configuration or customization.

1. **BACKGROUND**

INDNR’s Division of State Parks manages 36 properties encompassing over 173,363 acres with an estimated 17 to 19 million visitors per year. DSP manages a diverse range of operations and facilities, from smaller off-road riding areas and parks designed primarily for hiking or wildlife viewing, to several larger properties with additional amenities like campgrounds, nature centers, and reservoirs for boating recreation. Within these properties, there is something for everyone, including but not limited to:

* 2,273 buildings
* 15 pools/aquatic centers
* 7 inns/lodges
* 20 beaches
* 7 restaurants
* 18 marinas
* 1 18-hole golf course
* 27 nature centers
* 631 inn rooms
* 8,098 campsites
* 870 miles of trails
* 181 park/inn cabins
* 61,600 acres of hunting land
* 227 picnic shelters
* 38,100 acres of lakes
* 488 full-time park/inn staff
* 84 boat ramps
* 1,970 seasonal park/inn staff
* 160+ playgrounds

***Note:*** *The seven inns/lodges/restaurants, the golf course, and a few of the camp stores owned by INDNR and located on INDNR properties are operated by the Indiana State Park Inns Authority, and the management, reservations, and operations for those specific facilities are* ***not*** *included in the scope of this RFP. However, their existence can influence certain logistical considerations at INDNR properties as a whole that may be mentioned in, or fall within the scope of, this RFP.*

**INDNR’s Central Reservation System: 2002 to Present**

Since December 2002, INDNR has had a web-based electronic centralized reservation system (CRS) for reserving campsites, cabins, shelters, etc. The CRS consists of three different sales channels known as the web (online), reservation phone line (or call center, formerly), and the field (in person at DNR properties). Currently, approximately ninety-five percent (95%) of reservations are made online, just over four percent (>4%) are made over-the-phone through the reservation phone line, and the remaining reservations are handled on the day of arrival as in-person walk-ins at a DNR property.

INDNR currently has the following types of facilities available for reservations through the CRS: campsites (improved and unimproved), cabins (family and primitive rent-a-camp style), group camp facilities (two are broken apart as individual reservable cottages with mess/dining halls at different times of the year), open-air shelters, enclosed recreation buildings, rally camp sites, and youth tent group camping areas.

Each facility type has specific business rules, such as the minimum/maximum booking windows, minimum/maximum stays, cancellation and transfer policy/penalties, check in/out times, season dates, and more. All business rules are compiled into a document included in this RFP as **Attachment F2, INDNR CRS Business Rules for 2024-2026.** Business Rules are subject to change as required by INDNR but are reviewed at least annually for necessary updates. It is expected that the awarded Solution can be configured or customized at any time to accommodate INDNR’s Business Rules and/or any modifications of those rules after initial implementation.

The following chart shows the total number of CRS reservations (by year) from 2021 to 2023 for all facility types, the number of days or nights those reservations equate to, the average length of stay for those reservations, and the corresponding gross revenue.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Calendar Year** | **Number of Total Reservations** | **Number of Reserved Days/Nights** | **Average Length**  **of Stay** | **Gross Revenue** |
| **2023** | 270,348 | 748,301 | 2.77 | $22,199,717 |
| **2022** | 270,035 | 738,137 | 2.73 | $22,069,985 |
| **2021** | 297,363 | 793,895 | 2.67 | $23,202,060 |
| **AVERAGES** | **279,249** | **760,111** | **2.72** | **$22,490,587** |

**INDNR’s Retail Point-of-Sale System: 2016 to Present**

In 2016, DSP properties transitioned from an outdated cash registering system to a more accountable, integrated retail point-of-sale and inventory management system (legacy system is referred to in this section as “POS”). Currently, DSP’s financial model consists of over 140 revenue sources through which thousands of products are sold at INDNR properties, along with some limited online offerings.

Products or items sold and tracked through POS currently include, but are not limited to, various types of serialized permits and passes, daily gate and pool entrance fees, rental fees (e.g. boats, bikes, skis, toboggan sleds, etc.), gift shop items, groceries, food concessions, apparel, and special event sales (e.g. Solar Eclipse, annual native plant sales, Indianapolis Boat Sport and Travel Show, etc.).

Today, 224 individual POS stations across 36 DSP properties sell retail items and/or process customer transactions. Stations currently consist of 222 laptops/desktops and two (2) mobile units. The following chart shows the number of unique products sold through INDNR’s current POS, how many of those products (combined) were sold, and how much in non-reservation gross revenue was collected via POS transactions from 2021 to 2023.

|  |  |  |  |
| --- | --- | --- | --- |
| **Calendar Year** | **Unique Products Sold** | **Total Number of Products Sold** | **Gross Revenue from all**  **Non-CRS (Retail) Sales** |
| **2023** | 3,655 | 2,421,357 | $21,367,905 |
| **2022** | 3,586 | 2,302,797 | $20,248,907 |
| **2021** | 3,609 | 2,420,763 | $20,914,595 |
| **AVERAGES** | **3,617** | **2,381,639** | **$20,843,802** |

Revenue collected through INDNR’s current CRS/POS system is nearly $44 million of DSP’s total customer-based income per year, with another $1 million processed outside of the system from other sources. It is INDNR’s intention to capture all revenue through the Solution awarded from this RFP.

1. **SOLUTION COMPONENTS**

At a minimum, the preferred comprehensive Solution must be comprised of the following integrated components:

1. A **Central Reservation System (CRS)** component that seamlessly processes registrations, reservations, cancellations, and changes/transfers through an online customer-direct application, an over-the-phone/call center option, and in-person sales at INDNR properties.
2. A **Point-of-Sale (POS) & Inventory Management (IM), (collectively POS/IM)** component that seamlessly processes the sales, returns, and exchanges of trackable inventory through an online application, a Contractor-managed over-the-phone option, and in-person sales at INDNR properties. *Note: INDNR will also consider Solutions that offer POS and IM as separate, interfaced components.*
3. A **Gift Card Program** component that will fully integrate with or be absolved by a single INDNR agency-wide Gift Card program at some point in the future. The Solution should have the ability to sell, redeem, or refund Gift Cards by any payment method via any sales channel.
4. An **Event Management** component that can assign a unique umbrella identifier to an event or group with which all reservations, sales, recreation rentals, and other event- or group-related transactions may be tracked, invoiced, searched, and reported.
5. A **Venue and/or Ticketing Management** component that allows for online and in-person booking of tickets with various pricing structures for tours, school groups, theater/amphitheater shows, and other events with a timed start and/or limited capacity. An acceptable Solution would track and report the ticketing inventory, recognize when a venue or tour time is sold out, and suggest or offer other available options to customers. This component would also allow for a timed-entry daily entrance to be sold online in advance of arrival.
6. A **Time-Managed Recreation Item Rentals** component that allows for time-slot management of hourly or daily rentals of boats, bicycles, skis, snowshoes, toboggans, and other recreational items online or in-person either through an advanced reservation or in real-time.
7. A **Customer Self-Service Options** component to register and pay for a campsite, cabin, or other facility rental, to purchase passes/permits or daily entrance for an INDNR property, and other possible functions. This option must include methods and functionality for real-time transactions, including payment collection, receipt distribution, and financial tracking and reporting.
8. A **Reward or Loyalty (VIP) Program** component for customers that integrates with dollars spent across all aspects of INDNR business operations (e.g. park-operated gift shops, camping, equipment rental etc.) and automatically applies discounts or free items when established requirements have been met or available redemptions are claimed by the VIP customer.
9. **CENTRAL RESERVATION SYSTEM (CRS)**

INDNR is seeking a Central Reservation System (CRS) that seamlessly processes customer walk-in registrations, advance reservations, cancellations, and changes or transfer requests online, over-the-phone, or in person.

1. The Contractor shall provide the above referenced CRS to INDNR for the reservation of a variety of facilities, including, but not limited to, campsites, shelter houses, recreational buildings, group camps, cabins, rent-a-camp cabins, cottages, and other rental facilities as required or added by INDNR.
2. The **Attachment F2, INDNR CRS Business Rules for 2025 – 2026**, must be followed throughout the implementation and execution of the CRS, recognizing that these Business Rules are subject to modification annually via INDNR committee review, or State policy, rule, or legislative changes.
3. The CRS must fully integrate and interface with the other seven (7) components of the Solution requested in this RFP including, but not limited to, a forward-facing user interface, process workflow for INDNR users, transaction history, revenue flow until completion through the State’s Financial System, and backend reporting functionality.
4. A single dedicated forward-facing web address of **Camp.IN.Gov** must be maintained for the purpose of allowing and managing INDNR Reservations ONLY. All reservations, cancellations, transfers/changes, and other transactions shall be directed and promoted through this web domain. All marketing materials and promotional messaging shall direct customers to use **Camp.IN.Gov** for making INDNR facility reservations.
5. The CRS must manage available rentable inventory on a real-time basis without delay in booking or processing inventory changes for both the external customer and the INDNR field staff/management. For example, when a site is placed in a shopping cart, that site is unavailable to other customers until it is either booked/paid for, has been inactive for a pre-determined period of time, or the cart has been abandoned. Once a piece of inventory has been paid for and confirmed, it is no longer reservable by another person. There should be no delay between the site reservation and visible availability to others.
6. The CRS must provide an option that, in the event of a connectivity outage at an INDNR property, a freeze can be placed on the web or phone line reservations, allowing only offline walk-in registrations at INDNR properties, which will then sync-up when connectivity is back online, and all sales channels become active again. The reverse option must also be available – in the event of a connectivity outage in at an INDNR property, the decision can be made to block all in-person walk-in registrations, allowing only advance reservations online and over-the-phone until connectivity is restored. Each of these options should be as seamless as possible and involve little-to-no manual manipulation of inventory or rules.
7. The CRS component will be a part of **Phase 1** of the Implementation Plan, as outlined in this RFP.
8. **POINT-OF-SALE (POS) & INVENTORY MANAGEMENT (IM)**

INDNR is seeking a retail Point-of-Sale (POS) cash registering Solution that contains a comprehensive Inventory Management (IM) mechanism, which is integrated with the CRS and all other components of this RFP. This POS/IM portion of the Solution will seamlessly process sale, return, and exchange transactions and track product inventory for all sales channels.

1. The Contractor shall provide the above referenced POS/IM to INDNR across offices, gatehouses, camp stores, gift shops, concessions, and other revenue collection locations at INDNR properties. IM capabilities shall track both the initial and ongoing product supply, plus the outgoing product sales, of the following types of products at each location: a variety of entrance passes, use permits, and other fees, apparel, household goods, prepared food and beverages, groceries, vending, toys, gifts, handmade crafts, and much more.
2. Almost all POS/IM transactions will occur in-person at INDNR properties; however, a limited number of items must be available through other sales channels when related to stand-alone donations, entrance and day-use passes, etc.
3. The **Attachment F3 INDNR POS Active Product List** is a current list of all active retail POS/IM products. This list of roughly 7,800 products is for reference only; a final version will be provided to the Contractor during implementation. For reference, approximately 3,600 of the active products were sold/used in calendar year 2023.
4. The POS/IM must be fully integrated and shall interface with the other seven (7) components of the Solution requested in this RFP including, but not limited to, a forward-facing user interface, process workflow for INDNR users, transaction history, revenue flow until completion through the State’s Financial System, and backend reporting functionality.
5. The POS/IM component will be a part of **Phase 1** of the Implementation Plan, as outlined in this RFP.
6. **GIFT CARD PROGRAM**

The Solution should include a Gift Card component that accepts and identifies a Gift Card payment type across all integrated components.

1. Contractor to provide a physical, sturdy, credit-card-like Gift Card option, using INDNR-designed and/or -approved artwork, at no additional charge to INDNR. Contractor to also provide an online or electronic Gift Card option, which can be emailed to customers. *(NOTE: Unless otherwise noted, the term “Gift Card” will refer to both hard-card and electronic options.)*
2. Solution shall have the ability across all sales channels to:
   1. sell Gift Cards via any payment type
   2. redeem Gift Cards
   3. reload Gift Cards with additional funds
   4. refund or issue credits to Gift Cards (with INDNR initiation or pre-approval)
   5. check the balance of a Gift Card
3. Solution shall capture the revenue related to Gift Card transactions upon the redemption of the Gift Card, and not its original sale, appropriating collected funds to the correct account accordingly.
4. Gift Card component must be able to fully integrate into, or be absolved by, a single INDNR agency-wide Gift Card program as one develops in the near future, including, but not limited to the transfer of funds not redeemed and liability of outstanding balances of the Contractor’s Gift Card program.
5. Gift Card component must be fully integrated and shall interface with the other seven (7) components of the Solution requested in this RFP including, but not limited to, a forward-facing user interface, process workflow for INDNR users, transaction history, revenue flow until completion through the State’s Financial System, and backend reporting functionality.
6. If available, the Gift Card component should be integrated into Apple and Google Wallets.
7. Contractor’s Gift Card component will be a part of **Phase 1** of the Implementation plan and will “go live” for customers simultaneously with the CRS and POS/IM components as outlined in this RFP.
8. **EVENT MANAGEMENT**

INDNR is seeking an Event Management component that will assign a unique umbrella identifier to an event or group with which all reservations, sales, recreation rentals, and other event- or group-related transactions may be tracked, invoiced, searched, and reported.

1. Contractor to provide an integrated Event Management component to organize and coordinate all aspects of multi-faceted gatherings that occur on INDNR properties, including but not limited to corporate events, large meetings, weddings, fundraisers, special events, family reunions, etc.
2. At minimum, event- or group-related information that is tracked and stored electronically using the unique group or event identifier shall include the following:
3. All reservation numbers for campsites, shelters, and other facilities
4. All related point-of-sale transaction numbers for transactions occurring before, during, or after the event
5. All rentals of recreation items (e.g. boats, bicycles, etc.) occurring before or during the event
6. All INDNR Special Event permits or Vendor Permits related to the event, including the Special Event application fee initially charged prior to the issuance of a permit
7. Event Management shall include evaluation or scoring capabilities related to Special Event Permits. Functionality must be visible for INDNR staff with approved access and through administrative reporting under the assigned unique identifier for the group or event.
8. Although reporting and analysis of Event Management shall be viewable through individual and event-wide transactions, the Contractor will configure the Solution to treat all revenue recording and reporting from the individual event transactions in the same way as non-event transactions.
9. Not all Event Management criteria will have to be used for every event, and some events will require more information and data tracking than others. The minimum number of criteria needed for a basic build of an Event will be determined between INDNR and the Contractor during implementation planning.
10. Event Management shall have the ability to perform delayed invoicing or to “run a tab” of charges for the group throughout their stay, with payment being applied at the end of their stay through an accepted method of payment, or by generating an invoice that must be paid within a specified period of time per the rules determined by INDNR.
11. The Event Management component will be a part of **Phase 2** of the Implementation Plan, as outlined in this RFP.
12. **VENUE AND/OR TICKETING MANAGEMENT**

INDNR is seeking a Venue and/or Ticketing Management component that allows for the online, over-the-phone, and in-person purchase of tickets with various pricing structures for property tours, school groups, theater/amphitheater shows, and other events that may have a timed start and/or have a limited capacity. An acceptable Solution would track and report the ticketing inventory, recognize when a venue or tour time is sold out, and suggest or offer other available options to customers. This component would also allow for a timed-entry daily entrance to be sold online in advance of arrival.

1. The Venue/Ticketing Management component shall offer individual tickets or group sales tickets for venues that include, but are not limited to, guided museum tours, cave tours, room/facility rentals, fossil bed tours, pre-timed video showings, amphitheater concerts, historic pioneer village tours, etc.
2. Venue/Ticketing Management shall seamlessly process the sale of tour, venue, special event, concert, and other tickets and/or venue management across all three sales channels of the Solution.
3. Venue/Ticketing Management must have the ability to set the following parameters or meet the following criteria, depending on the type of tour, program, room rental, or other facility or event that is being booked:
   1. Ensure that different areas of a facility are available for rental within defined capacities and time frames. For example, individual or multiple rooms may be rented, or the entire facility may be an available option depending on the space needed.
   2. Allow school groups and/or other pre-defined groups to choose programs from a list of available topics that would be included in their price range and purchase related tickets prior to their arrival date.
   3. Ability to provide registrations for interpretive programs following a specific quantity or capacity limit, and then stop sales once the limitation has been met.
   4. Ability to bring standard ticket pricing to zero ($0.00) with the application of a special promotional code or other discounting method provided to specific groups or events by INDNR.
   5. Allow group organizers of approved special events to purchase event tickets online and track participation, while also allowing INDNR to evaluate the need for and apply additional capacity fees.
   6. Ability to authorize and/or charge a damage deposit prior to an event, rental, or reservation, and to charge a card on file with damages/cleaning fees at the conclusion of the event, rental, or reservation.
   7. Allow for add-ons related to room or facility rental, such as chairs, tables, linens, rent-an-interpreter, etc.
   8. Ability to charge a daily parking fee in advance of arrival, with ability for customers to print and save a tag or receipt for display in their vehicle or for reference on their mobile device.
4. The Venue and/or Ticketing Management component will be a part of **Phase 2** of the Implementation Plan, as outlined in this RFP.
5. **TIME-MANAGED RECREATION ITEM RENTALS**

INDNR is seeking a Time-Managed Recreation Item Rentals component that allows for time-slot management of hourly or daily rentals of boats, bicycles, skis, snowshoes, toboggans, and other recreational items online or in-person either through an advanced reservation or in real-time. *(NOTE: Unless otherwise noted, in this section the Time-Managed Recreation Item Rentals will be referred to as “Rentals”.)*

1. The ideal Time-Managed Recreation Item Rental Solution shall:
2. Allow customers to reserve and pay for the short-term rental of sport and recreational items for use during their visit to an INDNR property. Booking rentals shall be available as a separate transaction, or as part of a multiple-component payment transaction. For example, a customer may reserve a weekend campsite, buy firewood, and also reserve kayaks to use from 2-3 p.m. on the Saturday afternoon of their visit.
3. Manage rentals inventory at the individual property level, shall charge customers the correct amount for the block of time the item(s) will be rented, and shall remove booked rentals from availability for other customers.
4. Provide the customer with a unique rental confirmation number that may be shown to INDNR personnel at time of rental pick-up.
5. Accommodate maintenance and rotation of equipment, removing such rentals from available inventory and allowing for real-time inventory adjustments across all sales channels.
6. Provide INDNR with administrative capabilities to keep some rentable inventory apart from available advanced online reservations for the booking of in-person walk-up rentals.
7. Present all relevant Business Rules to customers, including any agreements or waivers necessary to book rentals. Electronic templates of the appropriate required agreements and waivers shall be available onsite for in-person walk-up rentals and be presented to online customers at time of advanced booking. Ideal solution will handle all signatures electronically and also store and retain the signed agreements or waivers for a specified length of time.
8. Have options for staggered rental start and end times across dozens of items with real-time alerts to customers and INDNR staff that the rental is both nearing and at expiration.
9. Allow customers, when inventory is available, to both extend time on rentals (prior to expiration) and pay for additional time on rentals through a mobile device to avoid having to physically report back to the rental facility.
10. Have the ability to charge a customer a late fee if rentals are not returned on time.
11. The Time-Managed Recreation Item Rentals component will be a part of **Phase 2** of the Implementation Plan, as outlined in this RFP.
12. **CUSTOMER SELF-SERVICE OPTIONS**

INDNR is seeking one or more Self-Service options that allow walk-in customers to self-register and pay for facility reservations, to conduct their own product or fee purchases, or other possible self-service functionality, as well as allow self-check ins upon arrival at an INDNR property when a facility reservation was made in advance online. Self-Service options can include physical hardware and/or additional features integrated into the software Solution.

1. Options may include new options for advanced transactions, or those that take place upon arrival at a property, such as being able to purchase a daily entrance pass while making an advance reservation online prior to a stay, or to purchase a daily entrance pass at a physical kiosk or electronic self-operated machine after parking, etc.)
2. Self-Service options pertaining to self-check in for an advance reservation shall include a method of geofencing or other location-based check-in technology are preferred, versus allowing a customer to check-in when they have not yet arrived at the property.
3. Options that would allow customers to notify management of any concerns as they arrive or while on-site during their stay, allowing the management to address the situation. These examples could include, but are not limited to electricity not working on a camp site, a restroom toilet overflowing, quiet-hour disturbances, property violations, etc. Emergencies would still be directed to emergency personnel through 911 services.
4. Currently, the INDNR administers a hard, credit-card-like card for several pass or permit types that are sold, including the various annual entrance passes. Self-Service options may include a mechanism to dispense these cards or may suggest an alternative annual pass or permit (e.g. sticker, temporary receipt for later fulfillment of hard card, etc.). Some permits sold, such as the lake permits, are already stickers.
5. INDNR is interested in exploring digital pass/permit formats and implementing tracking and reporting functionality that will provide analysis of where and how often customers are using their passes/permits. We are interested in a digital pass offering that could include incorporating geolocation tracking to provide valuable insights into customer behavior in order to tailor marketing strategies and possibly create special offers or notifications within a specific park or area.
6. Self-Service options must include a method for real-time transactions including payment collection, receipt distribution, and financial tracking and reporting functionality.
7. Self-Service options must include the ability for a walk-in customer to transact a camping registration through a QR code, kiosk, or another method, and to produce proof of that transaction so that INDNR staff know that the customer has paid for the site they are staying on (i.e. print a receipt, send receipt to phone, etc.).
8. Self-Service options would be used during various scenarios, such as unmanned, after-hours gates and offices, remote locations with limited or no INDNR staff, off-peak seasons when areas are not staffed as much or at all, etc. This may include automatic arms for entry after payment or pass usage, a parking kiosk or box that tracks entry into the park or parking space numbers that are tracked as paid or unpaid (i.e. Falls of the Ohio State Park charges for parking instead of daily vehicle entry.)
9. The Self-Service Customer Options components offered will be a part of **Phase 3** of the Implementation Plan, as outlined in this RFP.
10. **REWARD OR LOYALTY (VIP) PROGRAM**

INDNR seeks to implement a Reward or Loyalty (VIP) Program that integrates with customer spend activity and history across all aspects of INDNR business operations (e.g. state park inns, gift shops, camping, etc.) and automatically applies discounts or free items when pre-set requirements are met, or when such redemptions are claimed by the VIP user.

1. This program should not require any manual input or manipulation of redemption awards or reporting mechanisms to determine if a person is eligible for rewards points. The system should automatically apply and deduct rewards points based on established parameters.
2. The Contractor will customize and configure the integrated Rewards or Loyalty (VIP) Program component of the application to meet the needs of INDNR.
3. The Contractor will provide a very sturdy credit-card-like hard card for the INDNR Reward/Loyalty (VIP) Program at no additional charge to INDNR.
4. INDNR will design and approve the artwork for the card prior to distribution.
5. INDNR may request that the card also be available in duplicative electronic format (to appear exactly like the physical card and number that is assigned to the customer), to be saved and incorporated into the existing DNR App and Apple and Google Wallet as well.
6. The card or electronic membership must be trackable, linkable, and searchable by a customer’s 10-digit phone number. No “new” member, loyalty, or VIP number will be assigned as one more number a person has to memorize or keep track of.
7. Accessing or redeeming points for rewards will not be a manual process that requires INDNR staff to run reports or manually deduct or transfer points or discounts. Awards shall be made automatically based on established qualifications as dollars are earned, and the customer’s phone number can be looked up at any time by INDNR staff (or at a Self-Service kiosk) to determine the points balance on in the Reward or Loyalty (VIP) Program.
8. The liability of all points earned by customers must be tracked by the Contractor through reporting functionality so that INDNR is aware of the total outstanding liability at any given time
9. The Contractor will provide fulfillment services (mailing the card) for those customers who sign up for the Reward or Loyalty (VIP) Program online or over-the-phone during the CRS, POS, or advance Recreation Item Rental workflow. However, INDNR will fulfill all other requests for the Reward or Loyalty (VIP) card in the field or through other means of customer promotion and requests.
10. All rules, points, levels for redemption, and standard operating procedures (SOP) will be determined by INDNR prior to the rollout and implementation of the Reward or Loyalty (VIP) Program. Additional rewards and promotions can be added at any time after initial implementation following the modification requests timeline and instructions outlined in the final Contract.
11. Customers will be prompted to have the option to spend their rewards on their next transaction or save them for a later time.
12. The Rewards/Loyalty (VIP) Program component will be a part of **Phase 3** of the Implementation Plan, as outlined in this RFP.
13. **ADMINISTRATIVE MANAGEMENT**

The Administrative Management component supports all other components, including the primary eight (8) Solution Components of the system, and includes the following capabilities for use by authorized INDNR staff only:

1. **General System Administration**

Includes administrative ability to:

1. Identify (manually or automatically through established settings) a primary Customer ID and any duplicate customer profiles (e.g. same customer with more than one Customer ID), and consolidate or merge the duplicate Customer ID(s) with the existing, primary Customer ID.  The primary Customer ID’s profile must show a history of all reservations, cancellations, changes, refunds, or POS transactions, with the corresponding detailed history associated with each of those.
2. Separate customer profiles that were previously consolidated or merged, resulting in the original information (e.g. reservations, cancellations, changes, POS transactions, and corresponding associated history) going back to each original Customer ID.
3. Assign a unique identifier to each original transaction, indefinitely. No identifier may be duplicated in any manner over time or across contractual periods. All changes to the original transaction will be tracked using the same unique identifier to maintain a historical perspective.
4. Track, store, and make readily available to INDNR, all historical transaction data specific to each transaction and each customer for the period of time Contractor is in place, plus three (3) years after the expiration of the Contract and any subsequent time extensions.
5. Track data modifications via an audit trail.  Audit log shall include pertinent information such as Customer ID, the old and new values for the modification(s) made, date of modification, name of user who made the change, and any relevant explanatory comments
6. Prevent an ejected, suspended, or banned customer from making a reservation, purchasing items, or making transactions in the CRS or POS systems. Method would require ability for INDNR staff to indicate that the specific Customer ID was ejected from DNR, or is otherwise suspended, and to include a timeframe in which the ejection/suspension expires. Pop-up message would notify guest, INDNR attendants, and Contractor agents of the reason for not allowing reservation or sale. INDNR Legal Team would be involved in clearance of terminology and messaging used for this component.
7. Allow role-related access level control to let some INDNR staff add a note or flag a customer with pre-defined issues or concerns that management-level staff need to be aware of. Some examples may include property ejection, payment declined, caused damaged/excessive cleaning, etc.
8. Generate confirmation emails and/or letters to customers who make, change, or cancel reservations or recreation rentals.
9. Generate pre-set, pre-registration emails and/or letters that allow customers to confirm their final details before arriving at the property.
10. Generate automated urgent phone, text, or email messaging to customers when information needs to be disseminated with varying levels of urgency – from a traffic alert related to an upcoming DNR event, to campsite closures due to flooding.
11. Require date of birth entry for those facilities that have a minimum age to rent/reserve.
12. Require specific configurable information to be entered when a restriction is required for a reservation of a certain facility type (e.g. youth tent areas are for not-for-profit (NFP) groups made up primarily of youth. Need to collect verification data of NFP status.)
13. Allow INDNR Project Manager or designed to customize or control limited aspects or messages on Camp.IN.Gov regarding urgent or critical information that needs to be visible for consumers online immediately, without having to wait on Contractor support to make the changes for INDNR.
14. Require a unique primary occupant for each and every reservation that includes an address, phone number, and email address of the person who is going to be responsible for the site/facility during their stay.
15. **Application Configuration**

Includes administrative ability to:

1. Create new and modify existing CRS inventory or retail POS products, including name, chart of accounts information, season date(s), price/fee, taxes (county and state sales tax), start/end dates, any limitations or restrictions, and applicable rules. Pricing and fees must include options for sales, discounts, and dynamic changes.
2. Apply relevant business rules to a specific INDNR facility or inventory type, such as booking windows, lengths of stay, cancellation and transfer policies/penalties, check in/out times, season dates, and more.
3. Administer a lottery application, draw and award process for some inventory types that allows a customer an equal opportunity to make choices based on preference. A random drawing will generate results, producing a successful and unsuccessful list of applicants. Reports should provide a mechanism for knowing who applied when, and for what preferences during their application process. Notifications by email or letter will be made to both successful and unsuccessful applicants.
4. Administer a promotional or discount code where INDNR can advertise special deals such as discounted pricing, buy-one-get-one free (or reduced) options, and other opportunities based on occupancy, time of year or another factor deemed appropriate by INDNR. Codes may be applied to receive the discount when making a reservation/registration through any sales channel. The Solution should be able to recognize that a discount code was previously applied when an existing reservation is changed in some way, and then re-apply the discount code to the changed/updated reservation, if the discount requirements are still being met, without a manual process involved.
5. Allow a customer the option to share news of their reservation across social media if they choose to do so, and automatically format the posting according to the outlet the customer selects (Facebook, X (formerly Twitter), Instagram, etc.). The customer’s personal information, including the dates of their stay, will be kept private.
6. Create combination POS products (known as combo products) that include multiple items as a part of one overall product. Allow for a discount of different/varying amounts to be applied to each item within the combo product, and the tracking mechanism will report the sale, accordingly, tracking the revenue appropriately.

1. **User Accounts and Access**

Includes administrative ability to:

1. Set up system financials and reporting based on “each user”, in addition to “each location or station”. Reports need the ability to categorize or organize by each station, but due to auditing components of financials, the system should also be set up in a user-based manner so that all financial transactions are tied to a user that is logged in, and not just the station they are logged into. This will allow for reports to be run based on location or based on the user who is identified.
2. Set role-based security to limit access to specific areas of the Administrative Management component. Provide options for role-based security including, but not limited to, appropriate levels of access and security for a basic user, a field supervisor or team leader, a member of management, a security officer, law enforcement, and INDNR central office staff or Project Manager. *(Example: A park manager role would allow access to all financial information and reporting functions, while a gate attendant’s access might only allow access to more basic functions of selling passes and permits and registering or check in/out a camper. The park manager can do all the things that a gate attendant can do, but accumulatively more as well.)*
3. Modify system usernames and passwords.
4. Confirm, activate, modify, suspend, disable, and delete field user accounts.

1. **Searching and Reporting**

Includes administrative ability to:

1. Access and download comprehensive real-time reporting for tracking operational, financial, and informational pieces, including but not limited to CRS, POS/IM, Gift Card Program, Event Management, Venue Ticketing Manager, Recreation Rentals, Customer Self-Service, Rewards/Loyalty Program and all other recorded transactions within all Solution components, current and historical.
2. Assign available search, display, and reporting functionality by user role/login.
3. Search and display, in real-time, customer profile details (including loyalty/rewards information), reservation details, POS transactions, Gift Cards, invoice details, receipts, event details, ticketing information, recreation rentals, lottery applications, and users.
4. Export search results to csv or Excel formats (at minimum).
5. Create a variety of savable, filterable, and adjustable ad hoc reports related to all components within the Solution and modify existing canned reports using available system criteria and output requirements. Pre-defined reports must meet all specific INDNR requirements.
6. Provide query functionality and interactive reporting in an agency dashboard or administrative screen using Google Analytics or similar metric and data tracking system.
7. Set up the automated, timed running of reports that, upon completion, can either be emailed directly to INDNR staff on a pre-set schedule or that will notify INDNR staff via alert or email that the automated report as successfully run and is available for viewing within the Solution.
8. Access a list of standard reporting data field definitions and a list of available canned reports by name, including what standard data is presented or included on each report.
9. Request specific Contractor-created reports to be customized to include data selected by INDNR, in the event that a standard canned or INDNR Admin-created ad hoc report is not available to produce the desired information.
10. Give users the ability to set up or “subscribe to” reoccurring reports that they need for a given period of time, and also the ability to turn off or “unsubscribe to” those reports when they no longer need them.

1. **TECHNICAL REQUIREMENTS**

The Contractor shall coordinate with the Indiana Office of Technology (IOT) to define the specifications and responsibilities for all technical aspects of the Solution, including hardware, software, data storage, data transmission, connectivity, installation, and support.  Throughout operations, the Contractor is responsible for providing, maintaining, and supporting all environments necessary to operate a reliable system.

A strong preference of the State is to host the solution in an IOT-managed cloud tenant. INDNR is willing to consider proposals for solutions hosted outside of an IOT-managed cloud tenant, if the implementation model demonstrates considerable value to the INDNR and the State.

1. **System Availability**
2. The Solution must be publicly available to users a minimum of 99.5% of the time during any thirty (30) day period, and a minimum of an average of 99.5% of the time during any twelve (12) month period.
3. The Contractor must ensure that the total length of any system downtime that prevents the completion of transactions online, over-the-phone, or in-person must not amount to longer than a total of thirty (30) minutes per calendar month. Additionally, there must not be an interruption in public accessibility to the system that exceeds thirty (30) continuous minutes.
4. Excluded from system availability expectations are any previously established INDNR-approved dates and times for routine scheduled maintenance, or for natural disasters or other acts beyond the control of the Contractor as determined by INDNR.
5. The Contractor must notify INDNR as soon as possible after learning of any system issue that may affect system performance or impact system accessibility, use, or sales. Additional windows for any unexpected, yet necessary maintenance must be agreed upon in advance by all parties.
6. The Contractor shall produce and provide to the State monthly, quarterly, and annual reports of Solution downtime, and shall meet, upon request, with INDNR to review the reports and discuss resolution options.
7. Failure to meet system availability expectations as outlined will result in a damage fee assessment to the Contractor equal to fifty dollars ($50) per minute that the standard is not met.  Any damage fees will be measured and paid monthly by the Contractor separate from any routine invoicing.

1. **Customer Profile**
2. Solution must include robust capabilities for establishing and maintaining individual, unique customer profiles and Customer ID numbers across all components. Controls shall allow a new customer to be assigned a new profile and new Customer ID number but, through the matching of available data points (such as email address or phone number) shall attempt to prevent an existing customer from being assigned a second profile or Customer ID number.
3. The same unique customer ID or profile and its related settings shall apply to and be used for all system components. INDNR must be able to track and monitor customer activities and history via their unique profile across all components. Tracking shall include standard customer data, as well as any previous communication sent to the customer (e.g. post-stay surveys, direct marketing campaigns, etc.).
4. Public-facing and INDNR Administrative Management dashboards should be established to allow real-time tracking of all customer data.

1. **Technical Compatibility**
2. Software Solution shall be web-based (no installation required) and shall be accessible from any Contractor- or State-supplied computer, tablet, or phone to allow INDNR management to access, review, and update information in the system remotely at any time.
3. Customers must be able to access all online components of the Solution using any computer, tablet, or smartphone. Solution must be compatible with at least two (2) of the latest versions of multiple commonly accepted internet browsers (e.g. Edge, Firefox, Google Chrome, Safari, etc.) and must conform to the accessibility standards of Section 508 of the Federal Rehabilitation Act of 1973. It must also conform to WCAG 2.1 Level AA as set forth in Justice Department April 2024 ruling.
4. The in-person application must be compatible with the hardware and operating system provided by the Contractor and must work seamlessly over the network(s) established and monitored by IOT for the State of Indiana. The Contractor shall work with INDNR and IOT to identify, understand, and address, if possible, any potential technical or logistical limitations in the field.
5. The browser interface must be mobile-friendly and may additionally be available through an iPhone or Android App, which shall be free to download and easy to use and include no outside advertisements.

1. **Communication**
2. Customer notifications are a key component needed for the CRS. INDNR system administrators need the ability to send instantaneous alerts (via email, phone, text) to customers in the event of an emergency, a closure, or any other extreme situation where customers must be made aware of a situation immediately. There should be other levels of notification for less urgent matters (example: notes and alerts on a customer profile, or property page, or listed within a site reservation flow), but the primary concern is level of urgency and the immediacy of the message that needs to go out.
3. The Solution must provide technical ability for INDNR system admins to generate communication directly through the platform at any time to both customers and field staff.
4. INDNR system admins must be able to customize ad hoc messages, and establish routine, automatic notifications either to all customers; only specific types of customers (e.g. Monroe Lake electric campers, all youth tent campers across the state, etc.); or to customers who meet specific criteria (e.g. those living within a particular ZIP code; those who haven’t camped within the past year, etc.).  Communication options shall include an automated phone message, an email, a text message, and a visual display or alert on the home page of the application.
5. The Solution must allow INDNR system admins to, at any time, initiate, issue, or edit a broadcast message within the application for all INDNR staff users with defined user roles (e.g. basic user, supervisor, manager, etc.).  Targeted messaging shall be available to reach all field staff, or a group of field staff based on specific criteria (e.g. all field managers in a specified geographic area or ZIP code, all users at Ouabache State Park, etc.).
6. The Solution must allow a scaled-down level of communication where a member of property management could notify or alert only that property’s users or staff internally, and when a user logs in, they will see the message. Or, if a user is already logged in, a notification will make them aware of the alert or notice his/her management has sent out. This level of communication would need to be both property-specific AND user-role specific as well.
7. Prefer a Solution with an option for users to, at any time, opt into and/or out of email notifications related to various system component offerings, updates, events, etc. that are of particular interest to the user.
8. The Solution must archive a history of all communications and broadcast messages; all messages must be searchable by INDNR staff and customers. INDNR system admins shall have the ability to select past messages, and to modify and resend them to desired parties without the necessity of creating a new message.

1. **Data Migration and History**
2. System components must support and sustain migrated legacy data and customer accounts.  INDNR staff and customers must be able to view all (2014 to present) historical activity and transactions.
3. Successful implementation requires complete and accurate data migration from existing legacy systems.  Contractor shall consult with INDNR to:
   * 1. Assess legacy data structure and quality.
     2. Develop and document all data mapping, cleansing, and conversion requirements. Conversion of open, partial, pending, or incomplete transactions will not be required as part of the legacy data migration.
     3. Develop any custom tools, queries, or applications needed to perform the migration.
     4. Sufficiently test and validate at least one (1) full pilot process, prior to proceeding with subsequent data migration(s).
     5. Validate completeness and accuracy of the migration in the production environment and provide written documentation of the validation steps and results.
4. **Information Security**
5. The Contractor must impose INDNR and Indiana Office of Technology (IOT) practices, standards of security, rules, and guidelines, as well as adhere to all State of Indiana website policies applicable to the business operations provided under this contract.

1. IOT standards and practices can be accessed at the following websites:

<https://www.in.gov/iot/>

<http://www.in.gov/iot/files/Information_Security_Framework.pdf>

1. The State has robust and comprehensive data transmission standards that operate enterprise wide. The IOT established and maintains these standards, which support IOT’s data exchange and API-led strategies for the State. The Contractor’s solution must support the State’s standard API and file transfer methods to facilitate secure data transmission. The State’s standardized data transmission technologies are the MuleSoft API Management and GoAnywhere Managed File Transfer (MFT) services. See <https://www.in.gov/iot/policies-procedures-and-standards/applications-standards/>.
2. The Contractor must not use for its benefit, or the benefit of any third party, the contents of any cookies collected via the provided Solution.
3. The Contractor is prohibited from using Indiana customer contact, history, usage, or other information for the benefit of any third-party marketing captured within any of the components of the proposed Solution.

1. **Customization**
2. Contractor must configure and/or develop the Solution to meet the needs of INDNR, as defined in the executed contract.  The Contractor is responsible for providing, maintaining, and supporting the environments necessary to develop, configure, and test the system.

1. Contractor should offer interfaces and APIs for integration on dnr.IN.gov. such items can include booking widgets.

1. Contractor must provide a Solution that is configurable or customizable for the application of various business rules specific to and valid for individual INDNR facilities and/or transaction types, such as the minimum/maximum booking windows, min/max stays, cancellation and transfer policies and penalties, check in/out times, season dates, and more. All such configurations or customizations must be in keeping with the relevant business rule described in Attachment XX “INDNR CRS Business Rules for 2024-2026” provided in this RFP.
2. If needed or required by State of Indiana procurement rules, the Contractor must develop any bridges and integration code necessary for the Solution to interface with third-party software or systems (e.g. payment processing).
3. Contractor must provide revenue distribution, reporting, and reconciliation customization for INDNR as required by the Indiana State Board of Accounts, the State Comptroller, and all other applicable parties.

1. **Testing**

Contractor must perform, at minimum, the following testing activities prior to the start of operations:

1. System and integration testing to ensure the Solution functions as designed and correctly exchanges data. Integration testing must verify that each implemented component operates seamlessly as part of the overall comprehensive Solution.
2. Load and stress testing to determine performance levels under expected system loading conditions with production-sized databases; to evaluate how system performs under maximum stress conditions; and to determine the maximum capacity within specified performance levels.
3. Security code scans and PEN tests to identify any vulnerabilities in the code, websites, or other outward-facing part of the application that would enhance the risk of hackers gaining access to the system and its data. Any critical vulnerabilities found as a result of the scan shall be corrected prior to moving into the production environment.
4. User Acceptance Testing (UAT) demonstrating that the Contractor is ready to provide the system to the State, and validating that user requirements, as defined in this contract, are met. Contractor must support and assist INDNR during execution of UAT. Except for UAT, all other testing must be performed by the Contractor.
5. INDNR will verify the operability of the system, including all functional areas and output data. System performance will also be evaluated against the performance requirements specified in the contract.
6. INDNR must approve any modifications to agreed-upon system configurations.
7. The Contractor must test the accessibility and performance of all functions, screens, reports, and other components of the application.
8. Prior to implementation, installation, and operation, Contractor must provide to the INDNR Project Manager detailed written documentation related to testing (as it occurs), including the results of each type of test, a description of any defects or issues that occurred during testing, and all implemented corrections or resolutions.

1. **Change Control**
2. Changes in State or Federal legislation, regulations, rules, policies, or processes may require design modifications to any or all the system components.
3. The Contractor must establish a formal change control process to define new requirements, to obtain INDNR approval of changes, and to properly document and successfully implement all changes to the production system. System changes include, but are not limited to, modifications to code, configuration, server hardware, software, processes, and scheduled maintenance.
4. The process must be outlined and adopted for the implementation phase(s) but must also be described and defined for all post-implementation as changes are needed during the life of the contract.
5. INDNR staff must have access to directly update, without going through the Contractor’s change order process, all location/property information (e.g. images, descriptions, etc.), and to electronically upload or complete related forms online (e.g. participant releases, rental agreements, POS products, CRS inventory forms, site descriptions, photos, etc.).

1. **Hardware, Software, and Consumables**
2. INDNR anticipates that a total of 303 individual POS/IM stations and mobile units will be required for this Solution, rolled out in two stages, with the majority of those stations/units being rolled out in the first year of the Contract. The remaining stations/units in the second stage will be rolled out over the life of the contract.
3. See **Attachment F4 INDNR Locations for Hardware and Connectivity** for a complete list of these stations/locations referenced in the following Stages.
   1. **Stage One (1):** All of column D and one-fourth of column G must be implemented immediately at INDNR properties upon go live.
      1. This includes 222 individual POS/IM stations and up to 12 of the 49 individual POS/IM mobile unit or tablet stations.
      2. The 21 stations listed on row 244 and the 11 mobile units/tablets listed on row 245 that are *“TBD – allocated to IDNR Project Manager as needed” do not need to be included in State One (1).*
      3. *In addition, the other three-fourths of column G, or 37 out of 49 POS/IM mobile unit or tablets may be phased in over the first year of the contract after implementation occurs.*
      4. *Stage One has a total of 271 stations or mobile units that must be rolled out upon initial implementation, with 37 of those mobile units being phased in over the first year of the contract.*
   2. **Stage Two (2):** All remaining desktops, laptops, tablets or mobile units not rolled out in State One (1) will be added after the first year of the contract and rolled out over the remaining life of the contract as requested by the INDNR Project Manager.

1. The Contractor must furnish all consumable supplies as it relates to any of the eight (8) Components of the Solution, including, but not limited to all toner, ink and paper for every receipt and report printer. This also includes any postage, envelopes and paper for all mailed confirmations sent out by the Contractor to INDNR customers.
2. Maintenance and support of the Solution’s hardware and software must be routinely performed to achieve optimal system performance.   Contractor is responsible for this maintenance and upkeep.
3. Contractor must provide maintenance and support for the production environment, which includes identifying and developing standard maintenance requirements, updates, patches, enhancements, repairs, correction of application defects, system tuning, performing modifications, content changes, and technical support.
4. If the Contractor upgrades its base system software, then INDNR shall receive the new system upgrades, including all items agreed upon in this contract, at no additional charge.
5. All server hardware will be new at the onset of the contract prior to implementation.
6. All field hardware will be new at the onset of the contract prior to implementation as stations and mobile units are rolled out in Stages. This includes desktops, laptops, tablets, monitors (regular or touch screen), keyboards, cash drawers, barcode scanners, receipt printers, report printers, usb hubs, battery back-up devices, and any other associated hardware or peripherals needed to operate the Solution components.
7. Throughout the life of the contract, all hardware will be replaced on a rolling 3 to 4-year window; while outdated, broken, or damaged hardware and software will be updated or replaced as needed, whichever of these timelines comes first.
8. When it is determined that hardware needs to be replaced, and that replacement affects the collection or processing of revenue, the new hardware will be shipped within twenty-four (24) hours of diagnosis/determination. Overnight or next-day shipping with tracking will be used so that the property receives the replacement or new hardware within twenty-four (24) to forty-eight (48) hours of determination that the hardware needed replaced.
9. Hardware maintenance must include preventative and remedial maintenance, installation of safety and security changes/updates, and installation of engineering changes based on the equipment’s unique specifications. Maintenance must include any repair, replacement, or exchange necessary to keep equipment in good working condition and at a performance level in keeping with the manufacturer's published specifications and this contract.
10. **SYSTEM SECURITY**

1. **Disaster Recovery**
2. Contractor is responsible for establishing, following, and routinely auditing a robust strategy for data storage and backup files at a secure offsite location, and must immediately notify INDNR of any data loss, breach, or failed recovery.
3. Contractor must provide a Business Resumption Plan for the Solution, including a description of how critical business operations will continue in the event of disruption or complete system failure. If requested, to the extent that it does not compromise security or trade secrets, test results of the plan must be made available to INDNR.
4. The plan must meet the Disaster Recovery (DR) requirements of the State. The Contractor must apply recognized industry standards governing disaster preparedness and recovery, including the ability to continue processing if the primary hosting facility is rendered inoperable. Plan must include, but not be limited to, critical lines of business and supporting functions; a process for reporting to the State any system disruption/failure; emergency procedures; transition from failure to restart; and a timeframe for updates to the plan.
5. The Contractor is responsible for the creation of a DR environment such that the Solution’s operations can be seamlessly transferred to a separate hosting facility in a separate geographic location. This DR environment must be activated upon complete failure of the primary and secondary systems at the primary hosting facility as a result of disaster, only when it is determined that correction of the production location cannot be accomplished within the timelines established for activation of the DR site as the production system. The DR environment must fully replicate the environment at the primary hosting facility. Contractor must notify INDNR immediately in the event of system fail-over to the DR environment.
6. The Contractor must prevent unauthorized access to the Solution and apply recognized industry standards to address system vulnerability to theft, mischief, and efforts at tampering.  Such security measures must comply with the State’s current or future security policies and procedures.  As determined by the State to be appropriate, the following specific security measures must be addressed:
7. Computer hardware and software controls that ensure acceptance of data from authorized networks only.
8. Placement of software controls that establish separate files for lists of authorized user access and identification codes.
9. Upon request, Contractor must enact security access measures to prevent access to the Solution by specific individuals identified by INDNR.
10. Removal of access to the Solution for any former INDNR or Contractor employees.
11. Manual procedures that provide secure access to the system with minimal risk.
12. Multi-character alphanumeric passwords, unique usernames, identification codes, or other security procedures that must be used by State or Contractor personnel.
13. INDNR may require Contractor to conduct security risk analyses and periodic license verification of all security software, and to provide to the State confirmation of its completion through the provision of quarterly PCI certificates and Annual Attestation of Compliance certificates (or alternative methods that may become available in the future). Risk analysis shall include the system's user password strength, virus protection, operating system updates and patches, and related software and equipment.
14. Contractor must immediately notify INDNR of any known or possible security breaches after discovery, followed within one (1) business day by full written notice.

1. **Physical Security of Facility**
2. The Contractor must be responsible for controlling physical access to any identified call center(s) and other Contractor facilities that are, in some way, part of the INDNR Solution.
3. Physical security for each Contractor facility must include camera surveillance, lockable areas (e.g. gates, doorways, server racks, etc.), and other reasonable security measures as advisable and necessary.
4. Staff and visitors must be immediately discernable by identification badges and must sign in and out of any facility housing any part of the INDNR Solution.
5. Preventive measures against catastrophic damage (e.g. fire, flood, etc.) must be present.

1. **Data Security**
2. The Contractor must prevent any breaches of security that result in the Personally Identifiable Information (PII) of customers being accessed or shared with any entity other than the State or entities approved by the State.
3. Damage fees equal to five-thousand dollars ($5,000) shall be assessed by and paid to INDNR for each single instance of a breach. Additional costs associated with recovering compromised data and/or protecting individuals placed at risk from a breach will be assessed per affected customer. The additional fee standard will be measured against and paid specifically to each occurrence.

1. **CONTRACT MANAGEMENT**
2. **Account and Project Management**
3. The Contractor must appoint one (1) person as their primary Project Manager for the Solution. Contractor’s Project Manager shall be dedicated to the INDNR contract and serve as an expert in the Solution application. The term "dedicated" implies that the Project Manager will be the primary point of contact to administer this contract, but they may have other responsibilities as long as INDNR’s expectations are met or exceeded.
4. The Contractor’s choice of Project Manager must be approved by INDNR. INDNR reserves the right to request and receive a new Project Manager at any time throughout the term of this contract.
5. The Contractor must provide a knowledgeable backup for the Project Manager to serve as the point of contact with INDNR should the Contractor’s primary Project Manager become unavailable for more than 24 hours (e.g. vacation, illness, etc.).  The Contractor shall provide INDNR with an organization chart for the project, and update the information whenever modifications occur throughout the life of the contract.
6. INDNR will provide oversight for the overall project; however, the Contractor must provide overall management of the required tasks including, but not limited to, day-to-day oversight of Contractor staff, call center or reservation phone line staff, technical help desk, customer service help desk, and all other operations related to the contract.
7. The Contractor is expected to suggest and incorporate best practices and expert knowledge based on their experience implementing similar systems. The system/Solution provided to INDNR is expected to include all features of the contractor’s standard system/Solution, even if not specified in the INDNR project scope of work or other specifications.
8. The Contractor must track all requirements through each stage of the development life cycle from specification through the production deployment of the comprehensive Solution and all its components and phases; and must provide a mechanism to integrate test cases against the requirements for traceability.
9. Contractor must work with INDNR to fully understand/elaborate on the scope, requirements, purpose, and implications of each requirement by holding discussion sessions, site visits, or interviews with the stakeholders and INDNR subject matter experts. The Contractor’s Project Manager and other relevant personnel from both parties shall meet in person or virtually no less than weekly during project implementation, and no less than quarterly after INDNR determines that implementation is complete.
10. Contractor’s Project Manager must provide electronic status report about the project implementation, installation, and other pertinent topics in a format agreeable for both parties. Contractor’s Project Manager must attend (virtually or in person) weekly project status meetings and provide INDNR with the report at least one (1) business day before the start of each meeting.  Status reports must contain, at a minimum, detailed descriptions of current statuses on all open risks, issues, or requests between INDNR and the Contractor, as well as descriptions of the work completed since the previous meeting, the ongoing work, and the future work to start within the two (2) weeks subsequent to the meeting.  Other topics will be added based on project activities at the time of the status meeting.  Summarized notes, including key decisions and action items, from each meeting shall be created and distributed by the Contractor’s Project Manager to INDNR within two (2) business days of the conclusion of each meeting.
11. The Contractor’s Project Manager must appropriately escalate to INDNR any major issues or barriers to the project’s success as soon as they are known, rather than holding the information until the next scheduled status meeting.
12. INDNR reserves the right to request additional meetings, discussions, or written documentation throughout the life of the contract as necessary to maintain product and project integrity.
13. At the beginning of project development, the Contractor must provide a comprehensive dictionary of Solution- or company-specific titles or terms that will be used in relation to INDNR’s Solution.
14. The Contractor’s Project Manager must work with the State’s independent project risk manager as part of the required risk management framework for large Information Technology projects.

1. **Performance Expectations (Maintenance & Operations)**
2. The Contractor must adhere to all performance requirements outlined in the final contract and shall document the results of all performance expectations in a report provided to INDNR no less than monthly.
3. Contractor must notify INDNR immediately upon identification of system-related problems, such as programming, data transfer, or performance issues.  The Contractor must make every effort necessary to correct such problems within twenty-four (24) hours of discovering the system issue. Contractor shall provide INDNR with periodic updates on the status of the Solution and an estimated timeframe when the problem will be fully corrected.
4. Contractor must correct within an agreed upon timeline any material programming errors attributable to the Contractor or that prevent the system from operating as intended and designed. INDNR will notify the Contractor, either verbally or in writing, of a discovered problem with the software and shall provide sufficient information to assist the Contractor in identifying a Solution.
5. The Contractor’s initial and ongoing responses to an application defect shall be appropriate to the severity of either the identified problem or the resulting levels of service interruption or customer inconvenience.
6. Contractor shall respond within four (4) hours to INDNR’s request for resolution of programming errors that slow the processing of data by any degree; that render minor and non-mandatory functions of the Solution inoperable or unstable; or that require users to employ workarounds to fully use the system. Furthermore, the Contractor must begin working on a proper Solution for the identified problem within one (1) business day by dedicating the necessary resources to correction efforts.
7. The Contractor will respond within one (1) hour of discovering any defects with more significant consequences than stated above, including those that render key functions of the system inoperable or that significantly slow the processing of data or revenue.  The Contractor must dedicate all available and appropriate resources to resolving the problem and shall begin working on a proper Solution immediately and, if requested, also provide personal on-site assistance.

1. **Escalation and Resolution**
2. Contractor must provide INDNR with a detailed escalation and resolution plan upon Solution implementation and provide 24/7/365 “on-call” contact information (e.g. email, mobile telephone, etc.) for all personnel identified in the plan in order to facilitate timely resolutions.
3. System issues that are within the Contractor’s control to correct, but that are not addressed within twenty-four (24) hours will be considered as an expectation not met.  Measurement will include problems on the primary system that are temporarily resolved by the Contractor’s backup system.
4. If Contractor fails to resolve the issue within the specified time, damage fees of five-thousand dollars ($5,000), or the documented amount of lost revenue, whichever is greater, per occurrence may be assessed.  Any damage fees will be measured and paid monthly by the Contractor separate from any routine invoicing.
5. If a problem cannot be fixed within the expected time frame, then Contractor shall also provide INDNR with regular updates on the progress of the correction and an estimated time of completion.  A summary of any proposed and/or final resolutions must be provided in writing to INDNR through the routine status reports.

1. **Marketing**
2. The management of customer profiles is critical to future INDNR marketing efforts.  INDNR desires the ability to use data from the Solution and its customer profiles to generate essential marketing efforts.
3. INDNR shall be able to access data and technological tracking tools, such as Google Analytics or similar tools, to take advantage of cross promotions and upsell opportunities. Data access used for marketing efforts shall include information critical to conduct direct email and other mass outreach campaigns, to discover underserved areas or under-attended events to better promote INDNR opportunities, or to generate customer satisfaction surveys, etc.
4. Ideally, the Contractor will become a marketing partner to assist INDNR in finding opportunities to better serve our customers.
5. The Contractor will provide reports to assist INDNR with Marketing and/or any tools available to them that can assist INDNR with exposure
6. Contractor shall apply/leverage Search Engine Optimization techniques to ensure high and visible ranking in search results.
7. Contractor shall offer import and export options to interface with INDNR’s Salesforce Marketing Cloud.

1. **Training**

Comprehensive training services for all levels of management, field staff, and the INDNR Project Manager. Training components will include a combination of annual regionally located hands-on computerized training for field staff in the winter/spring of each year. Additional resources for training will include some combination of interactive web-based topical modules, virtual interactive recorded training sessions, detailed field guides that are built around INDNR operations as they pertain to the system(s), and any additional resources needed to keep INDNR trained adequately on all aspects of available functionality as needed throughout the remainder of each year and as designated by the INDNR Project Manager.

1. Training shall be coordinated between Contractor and INDNR to ensure mutual objectives, business rules, and operational processes are met.  Contractor shall incorporate training as part of the project even prior to implementation of the Solution, and must create, maintain, and update an annual training plan, including the development and conduction of training services and materials necessary to successfully operate the Solution after implementation.
2. The Contractor must provide comprehensive training on all relevant Solution components for all users, including INDNR staff and management.  Solution shall also incorporate comprehensive online help features for customers.
3. Training on field application shall be remotely accessible on-demand, with further on-demand remote training on various aspects of the Solution as requested by INDNR.
4. Contractor must provide an opportunity for all users to evaluate the training program, including all formats, content, instructors, and delivery, both immediately after the training has occurred, and after an agreed upon timeline post-implementation to determine how well the training prepared users and stakeholders. Contractor must provide the results of these evaluations to INDNR in writing and coordinate a plan to modify the training based on the results of these evaluations.
5. Training content initially communicated via modern interactive methods, such as videos or live demonstrations, must also be provided in written form for subsequent reference and review.
6. Contractor must develop and provide comprehensive training for all reservation call agents, customer service agents, and technical support agents, tailored to their unique type of support they provide to INDNR staff and/or external customers. Training components must be approved by INDNR Project Manager
7. Contractor’s training materials must include Indiana-specific information and business rules documentation and expertise, in addition to the operational requirements/use of the application.
8. All training opportunities must allow for accessibility considerations using ADA guidelines.

1. **Contractor Invoicing**
2. There will be no fees assessed against INDNR’s revenue bank accounts or collected revenue dollars.
3. Contractor will invoice INDNR monthly for any fees associated with payment due to the Contractor, as outlined within the Contract.
4. Invoices shall be submitted only after all revenue funds are appropriately collected and settled into the correct State account(s) as described herein.
5. Details of the invoice format must be approved by INDNR before the first invoice is issued, but shall, at minimum, contain the following information:
6. Contractor’s name and address that matches their current Indiana State Comptroller supplier account
7. Invoice Date
8. Billing period/services included date(s)
9. Per-unit itemized breakout, description, and dollar amount of any individual fees assessed for the billing period
10. The total dollar amount(s) due
11. Payment of invoices shall follow the standard State of Indiana terms and conditions as outlined in the final contract and/or any related Purchase Order.
12. **Revenue Processing**
13. Purchase and payment transactions across all available sales channels (online, over-the-phone, and in-person) through the Solution must interface with one of the State’s contracted third-party payment processors (selected supplier to be determined by INDNR).
14. Multiple unique, individual merchant identification numbers (i.e. at least one (1) for each INDNR property) must be available within the Solution, if needed, to support integrated in-person credit card payment processing, including immediate and direct daily depositing of funds into each of the multiple corresponding and identified INDNR property revenue bank accounts.
15. Solutions that will not work with the State-contracted third-party payment processors or that will not provide the requested or required number of Merchant ID numbers, or other technical considerations necessary to process revenue per State and INDNR requirements across all sales channels, will not be considered for award of this Contract.
16. Collected INDNR revenue from online or over-the-phone sales (or other system transactions, if applicable), shall be distributed to INDNR no less than weekly via electronic ACH directly into one (1) or more central bank accounts established by the Treasurer of State and INDNR for this purpose.  At the appropriate point during the implementation process, INDNR will provide account information and further instruction related to revenue ACH deposits.
17. Detailed financial reporting for weekly revenue tracking and processing and for monthly bank account reconciliation at the individual INDNR property-level must be available to INDNR staff either on-demand through the Solution, and/or directly from the Contractor at dates/times specified during project planning or implementation.
18. At minimum, available financial reports shall include various query options and details related to all aspects of customer payment activity (e.g. specific dates or date ranges, locations, sales channels, payment types, individual transaction activity, etc.).
19. The Contractor must ensure that INDNR receives all deposits completely and in accordance with established timeframes and guidelines, and must provide troubleshooting support or information, if needed, to determine why funds were not received as anticipated.
20. If standards are not met at any point during a calendar year, then damage fees equal to one hundred dollars ($100) for the first occurrence; five hundred dollars ($500) for the second occurrence; and one thousand dollars ($1,000) for any subsequent occurrences after the second occurrence may be assessed immediately.  This standard will be measured and paid as each violation occurs and invoiced separately from other methods of invoicing.

1. **CUSTOMER SERVICE and SUPPORT**
2. **Reservation Phone Line/Call Center Assistance for External Customers**
3. While a physical brick and mortar call center is not required with this RFP, a dedicated reservation phone line using the number 1-866-622-6746 must be maintained and staffed by the Contractor for the purpose of managing ONLY INDNR’s over-the-phone reservations and transactions.
4. At least seventy-five percent (75%) of all reservation phone line agents who work on the INDNR contract taking calls to assist INDNR customers must be residents of the State of Indiana**.**
5. The Contractor must hire/supply all reservation phone line agents. Agents must be able to pass knowledge-based tests regarding INDNR properties, CRS Business Rules, customer service, and other pertinent information related to Indiana properties prior to taking any calls on the Reservation Line.
6. Reservation phone line assistance shall include an option to be transferred to speak immediately with a call center supervisor or manager, without waiting for a call back, if the initial representative cannot provide satisfactory assistance.
7. The Reservation phone line staff shall immediately report -- following the escalation and resolution plan established with this contract -- any system-wide Solution issues that are reported by customers directly to the call center.
8. The INDNR Project Manager, in conjunction with the Contractor staff will attend / listen to monthly “call monitoring” sessions to review and critique a random batch of calls handled by agents to provide feedback and improvements to process workflow. This step is critical for coaching agents to success.
9. All reservation phone line issues must be thoroughly documented and tracked by the Contractor.  INDNR must have access to historical call records and any open or pending issues and tickets.
10. The Contractor must provide monthly performance statistics on reservation phone line activities via a monthly status report.  INDNR will work with Contractor during implementation to determine which statistics are relevant and reportable.

1. **Reservation Phone Line (or Call Center) Performance for External Customers**

The Contractor’s call center shall be held to the following standards of responsibility and performance that will be measured, and paid if applicable, on a calendar-month basis:

1. Hours of Operation.  Contractor must ensure that the reservation phone line, including TDD or an appropriate alternative, is operational during the minimum number of required days and hours each year in accordance with the Contract.  Reservation line agents shall be available, at minimum, during peak times as pre-determined by INDNR, and the Contractor must manage for call volume during expected high-volume periods to maintain that 75% of agents answering the calls are Indiana residents. The established and INDNR pre-approved dates/times for scheduled maintenance are excluded from this expectation.
2. Minimum Hours of Operation:

* 12pm – 8pm eastern time (Monday through Friday),
* 12pm – 5pm eastern time (Saturday and Sunday)

1. Reservation phone line may close:

* At 4pm eastern time on Christmas Eve and New Year’s Eve, and
* All day on Thanksgiving, Christmas, and New Year’s Days

Damage fees will be assessed equal to sixty dollars ($60) for each hour/one dollar ($1) for each minute that the standard is not met.  Fees will be assessed monthly.

1. After-Hours Message.  The Contractor must ensure that a message, including TDD or another acceptable alternative, is available outside the designated hours of operation.  When the reservation phone line is closed, an automated after-hours voice message is required to inform callers to try again during normal hours of operation, or to visit the website (available 24/7/365).

Damage fees will be assessed equal to sixty dollars ($60) for each hour/one dollar ($1) for each minute that the standard is not met. Fees will be assessed monthly.

1. Hold Times.  No more than five percent (5%) of calls to the reservation phone line can be held in the answer-queue for more than two (2) minutes on average over a calendar month.  Time held in the queue does not include time using the automated voice response system as measured at the reservation phone line switch when the call first connects.

Damage fees will be assessed equal to one-hundred dollars ($100) multiplied by each one-half percentage point (0.5%) of calls that exceed the metric. Fees will be assessed monthly.

1. Call-Back Feature. A call-back option may be presented to callers whose call cannot be answered within the two-minute hold requirement. It must be an opt-in feature where the customer chooses to participate, and not the default or primary action that occurs. Specific requirements must be met, and approved by INDNR, prior to considering or implementing a call-back feature:
   1. The consumer must receive a call-back from the Contractor within 15 minutes of selecting the option.
   2. The call-back must come from an identifiable phone number that has “INDNR Reservations” or a similar name associated with it.
   3. The number that calls the customer must be a number that can be used for the customer to call back to receive assistance, should they miss the call or have a follow up question after hanging up with an agent.
2. Call Satisfaction Surveys.  A survey will be sent to customers who interact with reservation phone line agents. Survey respondents must meet a minimum ninety percent (90%) satisfaction level for any service or interaction directly attributable to or resulting from the Contractor’s actions each calendar month.

Damage fees will be assessed equal to one-hundred dollars ($100) multiplied by each one-half percentage point (0.5%) of calls that do not reach a ninety percent (90%) satisfaction rate each month. Fees will be assessed monthly.

1. **Online Inquiries**
2. The Contractor shall provide an online “Contact Us” option through which customers are able to send a message to be answered by the Contractor via email or telephone within forty-eight (48) hours of receipt.  If the correct response to an inquiry is unknown, then the Contractor will engage INDNR for assistance prior to responding to the customer.
3. INDNR reserves the right to approve any scripted responses to routine inquiries and expects every customer contact to be returned by the Contractor or its Consumer Support (CS) representatives in an accurate and timely manner.  All scripts will be reviewed by INDNR Project Manager annually, unless a need arises for them to be reviewed more often.
4. Failure to respond to these inquiries as expected may result in fees assessed under the performance terms established in the final Contract.
5. A chat or text option(s) may be provided to customers, however, only information and questions/answers can be provided through those methods of communication. No reservations or transactions can take place, neither can changes, cancellations, refunds, or other transactions involving the handling of funds.
6. **Consumer Support (CS) Help Desk and Team for Internal INDNR Staff (and Customer Escalations)**
7. Contractor will provide a CS help desk and team for supporting INDNR field staff, as well as escalations from the public that cannot be addressed by INDNR staff. INDNR staff, on behalf of customers, can call or email to obtain answers to questions or seek help regarding problems surrounding a customer service issue, a refund dispute or waiver, business rules explanations, etc.
8. The CS help desk must be staffed by the Contractor with agents that possess a high level of knowledge regarding the Indiana contract and the applicable business rules and must possess the ability to override standard protocol in the best interest of the customer or the INDNR when authorized to do so, and to assist with solving customer service problems in conjunction with the INDNR Project Manager.
9. The CS help desk must track all calls/emails from INDNR staff or the public by using a ticketing or case management system, or similar sufficient functionality within the overall Solution, that can identify the status of any issue at any time.
10. The minimum hours of operation for the CS help desk are:
11. Minimum hours of operation:

* 8 am – 8 pm EDT, Monday through Friday
* 10 am – 6 pm EDT, Saturdays and Sundays
* Additional after-hours support time may be required as escalations come through the INDNR Project Manager

1. CS help desk may be closed on

* Easter, Thanksgiving Day, Christmas Eve and Day, and New Year’s Day
* On New Year’s Eve, the CS help desk may close at 4 pm EDT
* Support may still be required from the CS team on days when the CS help desk is closed, as escalations come through the INDNR Project Manager

1. Hold Times.  No more than five percent (5%) of calls to the reservation phone line can be held in the answer-queue for more than two (2) minutes on average over a calendar month.  Time held in the queue does not include time using the automated voice response system as measured at the reservation phone line switch when the call first connects.
2. **Technical Support (TS) Help Desk and Team for Internal INDNR Staff ONLY**
3. Contractor will provide a TS help desk and team where INDNR employees can call or email to obtain answers to questions or seek help regarding technical or operational issues related to the CRS, POS/IM, Customer Self-Service options, or other components of the integrated system(s).
4. The TS help desk must be staffed by the Contractor with agents that possess a high level of knowledge regarding the Indiana contract, software applications, hardware components, and all aspects of the Solution.
5. The TS help desk must track all calls/emails from INDNR staff using a ticketing or case management system, or similar sufficient functionality within the overall Solution, that can identify the status of any issue at any time.
6. The minimum hours of operation for the TS help desk are:
7. Minimum hours of operation:

* 7 am – 11 pm EDT, seven (7) days a week, Sunday through Saturday
* Additional after-hours support time may be required as escalations come through the INDNR Project Manager

1. TS help desk may be closed on

* Easter, Thanksgiving Day, Christmas Day, and New Year’s Day
* On Christmas Eve and New Year’s Eve, the TS help desk may close at 4 pm EDT
* Support may still be required from the TS team on days when the TS help desk is closed, as escalations come through the INDNR Project Manager

1. Hold Times.  No more than five percent (5%) of calls to the reservation phone line can be held in the answer-queue for more than two (2) minutes on average over a calendar month.  Time held in the queue does not include time using the automated voice response system as measured at the reservation phone line switch when the call first connects.
2. **IMPLEMENTATION**

The Contractor shall successfully, and timely implement all required system components as outlined in the contract.

1. **Implementation Timeline**
2. Solution presented for final acceptance by INDNR must include – either by exact match or by accepted functional equivalency – all functionalities, responsibilities, actions, documentation, and other requirements of this Contract prior to initial implementation.  INDNR reserves the right to delay, at any time, any implementation process whereby the required components and expectations of the final, executed Contract have not been met or there is no confidence that they will be met.
3. **Phase 1** of the implementation will include following components: Central Reservation System (CRS), Point-Of-Sale & Inventory Management (POS/IM), and the Gift Card Program. This phase must be deployed in accordance with terms established in the final Contract.
4. **Phase 2** of the implementation will include the following components: Event Management, Venue/Ticketing Management, and Time-Managed Recreation Item Rentals. This phase must be deployed after the completion of Phase 1 and in accordance with terms established in the final Contract.
5. **Phase 3** of the implementation will include the following components: Customer Self-Service Options and the Reward/Loyalty (VIP) Program. This phase must be deployed after the completion of Phase 2 and in accordance with terms established in the final Contract.
6. No later than four (4) weeks after the initial project kickoff meeting, and at least six (6) months prior to the start of Phase 1 implementation, the Contractor shall provide a detailed implementation plan/project management plan, which shall be updated, as needed, to reflect project changes directly impacting the initial implementation plan.
7. Each phase will have its own implementation plan, along with one overall implementation plan for the entire project.
8. At minimum, an initial implementation/project management plan should include a checklist of all anticipated action items organized by key dates and responsible personnel.  Plan shall include details outlining the technical preparation, data migration/conversion, testing, training, and system changeover activities needed to successfully implement.  Plan should further include how the Contractor plans to identify, communicate, and resolve risks or issues during implementation.
9. Within four (4) weeks after project kickoff, the Contractor shall provide detailed tasks and associated durations and dependencies for all project work owned by the Contractor and must partner with INDNR to ensure all Contractor-owned tasks are integrated into a master project schedule.

1. **Assessment of Readiness**
2. The Contractor and INDNR will assess the operational readiness of all required system components including interfaces and required communications links.  Assessment will establish the final operational production environment in which transactions will be accurately and reliably performed.
3. When the Solution is presented by the Contractor to the State for final acceptance, it must account for all required functionality (or equivalent) that is outlined within this RFP and the final executed Contract. If the system does not account for all required and expected functionality, then the State will not accept it and will delay the implementation timeline.
4. Contractor must guarantee an on-time implementation of the system and its components without any delay caused by the action or inaction of the Contractor, or by lack of meeting expected deliverables within the Contractor’s control.
5. If the Contractor fails to meet the implementation deadline and requirements in this Contract through its own negligence, then damage fees in the amount of fifty thousand dollars ($50,000) per calendar day beyond previously established deadlines may be assessed.