

**Section I – Items for Board of Directors Action**

**TO:** Chair and Members of the Board of Directors  
Friday, May 23, 2025 Meeting

**FROM:** Linda Charlebois, Director, Corporate Services

**RE: REQUEST FOR PROPOSAL FOR PARKS AND  
EDUCATION CUSTOMER MANAGEMENT SYSTEM**  
RFP No. 10042322

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**KEY ISSUE**

Award of Request for Proposal (RFP) No. 10042322 for modernizing Toronto and Region Conservation Authority's (TRCA) customer management and service delivery for public-facing services at TRCA parks, trails, education and events programming.

**RECOMMENDATION:**

**WHEREAS TRCA is engaged in a project that requires a modern customer management and operations system to support Conservation Parks & Lands, Education & Training, and other public-facing services;**

**AND WHEREAS TRCA solicited proposals through a publicly advertised process and evaluated the proposals based on the criteria;**

**THEREFORE LET IT BE RESOLVED THAT RFP No. 10042322 for a Parks and Education Customer Management System be awarded to ParkPass Inc. at a total cost not to exceed \$987,500, plus applicable taxes, to be expended as authorized by TRCA staff;**

**THAT TRCA staff be authorized to approve additional expenditures to a maximum of \$98,750 (approximately 10% of the project cost), plus applicable taxes, in excess of the contract cost as a contingency allowance if deemed necessary;**

**THAT should TRCA staff be unable to negotiate a contract with the above-mentioned proponent, staff be authorized to enter into and conclude contract negotiations with other Proponents that submitted proposals, beginning with the next highest ranked Proponent meeting TRCA specifications;**

**AND FURTHER THAT authorized TRCA officials be directed to take**

**whatever action may be required to implement the contract, including the obtaining of necessary approvals and the signing and execution of any documents.**

## **BACKGROUND**

TRCA has relied on a patchwork of single-purpose business software to deliver services through its parks, education, and event programs. These systems were acquired over several years to provide point-of-sale services, online bookings and reservations, store systems and event registrations.

The reliance on these isolated systems has resulted in:

- Lack of visibility to customer information and sales behaviour;
- Limited integration and automation of services;
- Barriers to self-service and online processes;
- Customer support challenges to support customer bookings and payments;
- Limited ability to cross-sell and promote new programming; and
- Continued challenges to plan new programming and services.

More importantly, the current state of business solutions creates a complex and often frustrating experience for our customers, including:

- Long queues and wait times for park gate admissions;
- Multiple sales processes across TRCA and 3rd-party provided services;
- Complex processing of refunds and modifications to reservations;
- Camp bookings that require multiple transactions for families and groups; and
- Event bookings with complex, manual processes.

In 2024, the Conservation Parks & Lands and Education & Training divisions collaborated in the search for a modernized, integrated customer management solution to better serve their customers and deliver effective programs and services. Initial market research confirmed that potential solutions existed in the market and were in use at other organizations with similar programming to TRCA, including other conservation authorities.

The divisions developed a comprehensive set of requirements to support a request for proposal for a new modernized customer management solution, which was released in November 2024. The goals for this new solution

were to:

- Enhance customer experience;
- Improve self-service and automation;
- Expand revenue generation opportunities;
- Streamline Point-of-Sale and payment systems; and
- Minimize staff administration and support costs.

The desired solution targeted the following features and services:

- Park admissions and self-service gate automation;
- Ancillary sales through in-Park point-of-sale and onsite stores, including product sales, education resources, facility and picnic rentals, and recreational activities;
- Supply of POS equipment, maintenance and support;
- Online stores and eCommerce integration;
- Secure payment processing and account management;
- Membership management;
- Parking fee sales management or integration to 3rd-party parking fee management systems for trails and other external parking lots;
- Customer profile management and online portal;
- Education program registration and customer/client management:
  - Individual and family registrations;
  - Secure handling of client health information and special needs records;
  - Institutional client management and group bookings;
  - Community program and event planning/registration; and
  - Certification and skills development program tracking and registrar;
- Scheduling and bookings for events and festivals; and
- Reporting and analytics to support operational decision-making and program analysis.

The new integrated solution is expected to provide operational improvements through better delegation of administration and program administration to divisional staff, increased focus on delivering programs to customers and significantly improved visibility to customer information and

operational reporting.

## **RATIONALE**

RFP documentation was posted on the public procurement website [www.bidsandtenders.com](http://www.bidsandtenders.com) on November 29, 2024 and closed on January 24, 2025. Two (2) addendums were issued to respond to questions received. A total of eleven (11) firms downloaded the documents and six (6) proposals were received from the following Proponents:

- ACTIVE Network, LLC
- Monologix Inc.
- ParkPass Inc.
- RecTrac, LLC
- Upzoids Ltd.
- Xplor Technologies

The proposal from Traction Rec Technologies Inc. was disqualified because the bid documents were received after the deadline of 4:00 p.m. on January 24th, 2025.

An Evaluation Committee comprised of staff from Conservation Parks, Conservation Lands, Business Services, Kortright Programs and Information Technology and Records Management reviewed the proposals. The criteria used to evaluate and select the recommended Proponent included the following:

<b>Criteria</b>	<b>Weight</b>	<b>Minimum Score</b>
Proponent's Information and Profile	5	
Qualifications, Experience and Methodology	10	
Solution Evaluation: Functional and Technical Requirements Assessment	15	10.5
Understanding of Project, Requirements, and Scope of Work	25	

Proposed Work Plan and Timeframe	15	
<b>Sub-Total</b>	70	49
Pricing	15	
<b>Sub-Total</b>	85	
Presentation and demonstration	15	10.5
<b>Total Points</b>	100	

Following the technical evaluation, the following proposals did not meet the minimum score of forty-nine (49) for technical criteria and were not evaluated further:

- Upzoids Ltd.
- Monologix Inc.
- RecTrac, LLC

The remaining proponents were invited to present their proposals and demonstrate their solutions to the evaluation committee. The proponents were required to confirm the proposed scope of work in the proposal, as well as demonstrate how their solution will deliver the services defined in the scope of work defined in the RFP.

Following the demonstration evaluations, the following solutions did not meet the minimum score of ten and one-half (10.5) for the Presentation and Demonstration phase of the evaluation and were not evaluated further.

- ACTIVE Network, LLC
- Xplor Technologies

The remaining solution and highest ranked proponent demonstrated a solution that further validated the technical score from the proposal review and demonstrated their ability to meet TRCA's requirements.

Therefore, it is recommended that contract No. RFP No. 10042322 be awarded to ParkPass Inc. at a total cost not to exceed \$987,500, plus 10% contingency, plus applicable taxes, it being the highest ranked Proponent meeting TRCA specifications. Proponent's scores and staff analysis of the evaluation results can be provided in an in-camera presentation, upon request.

## **Relationship to TRCA's 2023-2034 Strategic Plan**

This report supports the following Pillars and Outcomes set forth in TRCA's 2023-2034 Strategic Plan:

### **Pillar 4 Service Excellence:**

4.2 Provide and manage an efficient and adaptable organization

### **Pillar 3 Community Prosperity:**

3.1 Connect communities to nature and greenspace

### **Pillar 4 Service Excellence:**

4.3 Responsive relationships and a trusted brand with a reputation for excellence

## **DETAILS OF WORK TO BE DONE**

The key deliverables and project schedule are outlined below:

- Phase 1 – Discovery (July-August 2025)
  - Confirm project priorities, timelines, and deliverables;
  - Validate key requirements and identifiable gaps;
  - Conduct technical readiness;
  - Prioritize and map existing business integrations; and
  - Update workplans.
- Phase 2 – Initial Configuration, Training and Quality Assurance (August-September 2025):
  - Set up of application environments (staging and production);
  - Configuration of core system functionalities;
  - Apply branding and initial customizations;
  - Financial services integration; and
  - User roles and training.
- Phase 3 – Education Program Launches (September 2025 to June 2026):
  - Prioritization for seasonality and locations;
  - Configuration of Education programs and services;
  - User testing and training; and
  - Operational support documentation.
- Phase 4 – Parks Program Launches (September 2025 to June 2026):
  - Prioritization for seasonality and locations.
  - Configuration of Parks programs and services.
  - User testing and training; and
  - Operational support documentation.

- Phase 5 – Gate Automation and Parking Services (September 2025 to August 2026):
  - Prioritization and scheduling of automated gates, manual gate upgrades and unattended lots;
  - Installation and configuration of controllers;
  - Activation of parking module for trailheads and external lots;
  - User testing and training; and
  - Operational support documentation.
- Phase 6 – Business Application Integration (August 2025 to September 2026):
  - Prioritization of integrations and workflows;
  - Detailed integration designs;
  - Development and technical testing;
  - User testing and training; and
  - Operational support documentation.

The Proponent staff resources dedicated to support the delivery of the project involve senior staff from the company and have led other comparable initiatives in Ontario. A budget of \$130,000 has been identified within the proposal to manage proponent resources during the project implementation.

The specific staff resources assigned include:

- Chief Product Officer and Technical Director;
- Director of Engineering;
- Product Analyst;
- Integration Specialist; and
- Quality Assurance Lead.

TRCA staff to be assigned to the project implementation include:

- Project Management
  - Manager of Digital Solutions and Business Systems (Lead); and
  - Management representing Conservation Parks, Conservation Lands and Education & Training.
- Business Project Leads
  - Supervisory and Program Management staff to lead the design, configuration and testing of new program modules and interfaces, as well as lead operational management of the new services.

- Technical Leads
  - ITRM and CME staff to lead the technical development and integration services, as well as system administration support.
- Subject Matter Experts
  - Program delivery staff to support testing and deployment of new program modules;
  - Finance staff to support the integration of eCommerce and financial reporting; and
  - Communications, Marketing and Events staff to support the branding and marketing of new services.

TRCA project staff will be assigned to the project within the existing staffing budgets.

## **FINANCIAL DETAILS**

Solution expenses will be managed through account 015-13 for the Parks and Education Customer Management System, with all costs for the contract to be recovered from program revenues. As confirmed in the 2025 Annual Fee Adjustments Report (RES.#A 138/24), increases of fees ranging from 0% to 5% have been applied across programs, in part to cover the transition to this new point-of-sale/customer resource management software.

The new system is projected to enable new revenue sources and opportunities through both self-service automation and through improved marketing and promotion of products, programs and services:

- The automation of gate infrastructure will allow expanded hours of service and shoulder-season access for visitors;
- Improved online sales will provide improved ability to promote secondary sales of in-park services (e.g. swimming and other activities), facility rentals, and product add-ons for day camp and other education programs or events;
- The solution will enable the rollout of parking reservation sales for trailheads and external parking lots to generate new revenue streams from these assets; and
- The solution will also provide opportunities to support donations through secondary sales and customer promotions.

To supplement revenues so that the project and operational expenses for the system remain cost neutral, TRCA may consider adding a transaction



fee to bookings through the system as part of annual fee adjustments in 2026. Any profits will be used to finance ongoing maintenance, improvement, and expansion of Conservation Parks & Lands and Education & Training programs and services.

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**Date: April 21, 2025**