Response Document
RecChat Customer Spotlight: Bend Park and Recreation District, OR

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General Questions

How many RecTrac users do you have in your organization?

A little over 100

What do you use passes for? Activities or visits? Do you use punch passes?

We use passes for many different purposes. We use them as a way to calculate different discounts on programs for our Needs-based Assistance when registering for activities or when purchasing other facility passes. They are used to track usage in our facilities. When the patron checks in, they are prompted with visit purposes of why they are in the facility and reports are generated to take to our board to show how our facilities are being used and that helps drive what amenities are added to or expanded on with new construction projects (weight room vs. pool vs. sauna, etc.). We use a combination of time-period passes (monthly, quarterly, annual) as well as punch passes and daily visit drop-ins. They are also used to track our Personal Training sessions with our staff. As mentioned, we also use them for our PAC daycare program check-in/check-out processing. In March, we are launching a cycling reservation system that will rely heavily on passes. The bikes are set up as facilities in our system and only patrons with a full access time-period pass will be eligible to reserve a bike up to 72 hours in advance online. However, since it is free to reserve with a pass, to hold patrons accountable for reserving a bike, if they fail to show without cancelling, they are issues a ""Strike"" pass. Each strike expires one year after it is issued. If you have 3 active strike passes on your account, you can't reserve a bike until one expires.

We have found passes to be a great tool and utilize them for influencing access to reservations/registrations, determining fees, and for tracking how our patrons utilize our facilities.

How long do you give a family to pay for what's on their account from a rollover or transfer?

We use a form of installment billing, so we don't typically have balances. Currently, we make them pay 100% of what is owed on their account when they are shopping online (except for facility reservation charges). We were thinking of allowing 20% down payment for some of our camps with a due-by date a couple weeks before the start of the camp. We are still coming up with a hard policy on that since it will also play into a global online cancellation policy.

Do you use Access control in your facilities?

We do not use physical access control devices such as turnstiles or door locks, but we do use kiosks for visitors to use for self-check-in.

How have you streamlined scholarship registrations?

We actually use scholarships differently where we issue a pass based on the level of scholarship they qualify for. We then have rules that check to see if the member has a pass, and then discounts are given based on the pass they have. Since the passes have expiration periods, an email is sent to the household letting them know that a family member's pass is going to expire soon. These are sent out 30 days and a follow-up 7 days prior to the expiration of the pass so that they have time to gather any documents needed to re-apply. Also, we have two different emails, an English and Spanish email. Our patrons are marked as "Spanish-Speaking" with a family member feature coding and that is what determines which email they receive so that it is in their native language.

Do you allow your patrons the opportunity to cancel their own activities online?

We don't currently allow our customers to cancel online, but we're working on cancellation policy that's concrete that we can apply and have different tiers, different rules and percentages that get paid back to the customer. This will also expand to passes once we begin our monthly automatic renewals so that the patrons can manage their accounts online.

What has been your biggest challenge in RecTrac?

I think the big thing is trying not to get too lost in the "how do we do this" and more of the "why are we doing this". It's one of those things where it's so flexible, that there's many different ways to achieve a goal. Sometimes it just comes down to how many people are we serving with this change? I can most times answer, "Yes, we can do that", but it doesn't necessarily mean that we SHOULD do that. Are we talking about 10 people that are complaining about this one issue? Alternatively, are we talking about the other 90,000 that we could be potentially serving or would be impacted by a change?

What kind of policy changes have you made to accommodate RecTrac's capabilities?

We have made some changes in the way that we are calculating some stuff. Our "Out of district" fee is one that we've touched on, but also the way that people can manage passes. We have another daycare program that uses passes now. It used to be a combination of activity registrations and passes for our "PAC" program. That is a summer camp program at our pavilion when there's no ice. Now, parents can go on and instead of having to register every time they want to come to a session, they can buy a pass or they can or any number of visit days on it and have several different pricing tiers depending on when they purchase and how many punches they purchase at a time. Now that it is fully pass based, we can use the pass visit processing screen to see who is currently swiped-in to get rosters, we also have some RecConnect templates that are based on either who has a pass to let them know of unexpected closures or who is swiped-in to let only those parents know to come pick up their child, etc.

From the program coordinator and customer service staff perspective, we are able to drastically reduce the amount of non-relevant information from the management and processing screens through different screen designs. We are able to reduce fee input by having Discounts and surcharges calculate automatically, thus them to just having to enter one fee (previously it was 5 fees for all the different Needs-based assistance discounts, employee prices, etc.) and making templates to have it calculate correctly depending on if it was an activity level fee or a section level fee (Sections always override the Activity fee in our case). We also have several circumstances that are special cases such as school-district partner programs don't have Out of District fees, Buy 4 get 1 Free, Goalies don't pay for ice times, etc. that have been able to be built into the fee structure and re-use the section-link field to build in fee override codes that can be linked at the section level.

We are developing an online cancellation policy with different tiers of refunds and the list goes on...

Can you give an example of an accommodation that was made for online registration?

We have our needs-based assistance program, which calculates a discount based on whether you have a specific pass linked to your family member. We had a whole restructure of that. The accommodation for online registration, I would say we've increased our accuracy with the way we've done stuff. Before, with 10.3, the coordinators would have to put in several different fees and then we had all these fee codes that would have to match up and based on what "fee codes" you had in your account. It worked, but it was also a bit limiting with its logic. There was a lot of manual setup and human calculations with that. Now, coordinators can put in one fee and things automatically calculate. Out of District fees are more accurate because they used to be manually calculated, now they're a solid 20%. We also have family members that are in our TR programs that have third parties pay for their registrations. This is billed after the program is over, so during the registration period, we used to have the families call in and register at $0, but that balance would carry on their account and they couldn't sign up for anything else online without paying off that balance. Now, if there are a signing up for one of our TR programs AND they qualify for payment by this agency, they get a 100% discount when registering online so that they are not carrying a balance. We then bill the agency for that patron’s participation hours. When the re-imbursement check comes in, the staff can click on the activities that check is paying for and "Reset Fees" and because the discount only applies if purchasing before the program ends, it will reset the fees to the appropriate amount. Now those families can sign up for those programs in the same time window as everyone else and on their own without having to call or come into our facilities.

Upgrade and Training

Has Bend P&R updated to 3.1.10.x.x? If so, how has that rollout gone from 3.1.9.x.x to 3.1.10.x.x?

We are still on 3.1.9.05 at the moment.

Have you gone to NextGen yet? How has the reception been?

We have not gone to Next Gen yet. I am looking to update in the next couple weeks to a couple months. I'll be providing two shortcut links on everyone's desktop so they can get familiar with the new UI while still having the security blanket, if you will of the old UI and kind of wean them into that next generation knowing that it's eventually going to be permanent.

Do you have routine training sessions with staff to create consistent programming with VSI? How do you keep them updated with all that VSI has to offer?

We had a couple follow-up trainings for the coordinators before the second registration season after we upgraded to 3.1 as a "refresher and lessons learned" after going live. Other than that, we don't hold many routine training sessions with RecTrac, but I do sit in many of the different groups staff meetings as a sounding board for questions. Mostly, I will take breaks and go around and talk with different coordinators, managers, customer service staff and see how things are going on a routine bases and see where they are struggling.

I think the best method that I have found to inform staff is by sending out "Did ya Know" emails to our customer service staff. They are usually the ones that have the most questions because they are in a more stressful/demanding seat with a customer in their face and are asked to perform tasks that they may only do once every couple weeks/months or even once a year. When someone asks me how to do something in RecTrac like split payments, running childcare statements, how to sort a DataGrid or make a template, etc., I will construct an email with screenshots and step-by-step instructions for just that topic and send it to all the Customer Service staff. I assume that if one asks, usually there are others that could use a refresher or maybe haven't been asked to perform that task. Each staff can then save the email however best suits their organizational style for later reference if needed. This has been very well received by the staff as a whole.

How long did your staff take to adapt to the new software once you migrated?

Everyone knew that change was coming. There were some limitations with 10.3 that we were really excited to get tasked with 3.1. So, it was definitely a learning curve for a lot of people. Audrey did a great job of prepping staff and letting them know that the migration is happening, and this is how we are going to do it. And she would hand out screenshots ahead of time. We did have it already installed on another server that people had a link to that they could go in and play around with mock transactions and just kind of get a feel for how the screens are going to look and flow a little bit ahead of time when they had a couple of minutes of downtime in between their time sitting at a desk. We also did group training sessions ahead of time.

How long did you prepare/train before you made the change?

It took about a year of preparation, philosophically planning how we wanted to change things, and then really putting our nose to the grindstone for the last 6-8months of actually changing the way that we calculate stuff, our fee structures, rules and testing them very heavily and working very heavily with Vermont systems. Big shout out to Brian Hatch as he worked through many of the complex fee structures with me.