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Daxko Proposed Software & Services for Clifton Springs Area YMCA

Respectfully submitted: 9.23.2014

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▶ I. Executive Summary

Clifton Springs Area YMCA has undertaken an initiative to improve the efficiency and effectiveness of your operations and position the association for membership growth and sustained program quality. A key part of this initiative is the selection of a strategic partner that can provide a proven integrated technology platform to enhance current business processes and help your association achieve its strategic goals. At Daxko, we are committed to delivering comprehensive software solutions that meet the unique needs of your Y.

Daxko's Suite of Solutions

Daxko Operations

An operations software solution that will enhance business practices, foster growth, and support the strategic objectives of Clifton Springs Area YMCA by providing seamless management of constituents, programs, child care, financial development, financial processing, and online registration.

Daxko Child Care

With a focus on flexibility and efficiency, Child Care will help Clifton Springs Area YMCA manage children's schedules and schedule changes, allow for flexible registration options both onsite and online, streamline attendance tracking and automate attendance-based billing, simplify the complex process of dealing with state agencies and third party payments, and improve cash flow by lowering outstanding receivables.

Daxko Accounting

Daxko Accounting is a fund accounting software solution that will ensure accountability across the association. The system includes general ledger, accounts payable, budgeting, forecasting, and reporting.

Daxko Engage

Daxko Engage couples information from Daxko Operations with the flexibility and power of CRM tools to create a holistic view of your constituents for moves management, to automate relationship building activities through workflow tools, to track progress of major donor prospects, and to execute and track marketing campaigns and membership drives.

Daxko Impact Drivers

Every good Y association knows that implementing a member engagement program will boost member retention, increase member satisfaction, ensure member renewals, and fill program rosters. More often than not, however, a lack of time, resources, skills, and adequate tools often stands in the way. Daxko Impact Drivers is a member engagement program that delivers results. Through planned calls, targeted emails, and personal outreach, our experienced impact team executes your plan behind the scenes.

Daxko does more than provide a technology solution for Ys—we develop strategic partnerships with Ys to offer an integrated approach that will encourage new and improved business processes and promote your association's growth and development. Our proven software is the cornerstone of an overall service-based philosophy that commits both Daxko and Clifton Springs Area YMCA to better engage members and ultimately grow your Y. Daxko provides the leadership, technology, support, training, consulting, and ongoing stewardship that are required to ensure the success of your staff, volunteers, and the growing communities in your area.



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▶▶ II. Daxko Operations

More than any other software system in your association, the operations system is the most widely used and impactful. From your front desk staff to your administrative staff all the way to the member level, operations can create efficiencies and make life easier, or harder, for all. With intuitive, user friendly and streamlined solutions from Daxko you can empower your staff, meet and exceed your members' expectations, and accurately measure and communicate your community impact.

Staff Empowerment

You ask a lot of your front desk staff—sign-up new members, register participants for programs, collect money, and share what's happening in your association. Essentially you want them to create a moment of personal connection with your members as they enter the doors. What are you doing to make this a comfortable, seamless process for them? Having an operations system that is intuitive, user-friendly and streamlined allows them to quickly complete tasks and provide a level of professionalism to your member that is not possible with more cumbersome systems.

Member Expectations

In today's world of technology, access to online accounts and information is an expectation not just a wish. Your members want to be able to address the mundane tasks of updating contact information or credit card data, and the not-so-mundane task of signing up for their next round of personal training all at their convenience. Providing online account management and registration through your operations system is a great way to meet and exceed the expectations of their member experience.

Measure Impact

Operations systems house large volumes of significant data points, but coordinating that information into meaningful reports can be administratively burdensome. Being able to create customizable reports to run on demand allows your administrative and executive staff to uncover trends related to the health of the association and community impact. You stay informed and empowered to communicate the value of your association to members, the Board of Directors, donors, volunteers, and the community at large.

▶▶ III. Daxko Engage

Daxko Engage is a combine relationship management, marketing automation, and membership analytics platform tailored for member-centric organizations. It allows you to target groups of members and communicate with them in highly-focused, relevant ways. Daxko Engage also heightens face-to-face interactions with members, prospects, donors, and other constituents.

- **Groups.** Segment constituents into highly targeted groups based on demographics, interests, and behavior.
- **Initiatives.** Build and execute engagement workflows for people in a group.
- **Automated Email.** Automate delivery of highly-relevant messages to targeted groups via email.
- **Tasks.** Manage staff workload with high visibility and accountability.
- **Check-in Notifications.** Get notified when selected members check into a center
- **Member Details.** Detailed view of a person's relationship with your organization.
- **Contact Notes.** Easily record notes about interactions with a member.
- **Follow-up Tasks.** Create follow-up tasks and assign them to appropriate staff members or volunteers
- **On the fitness floor engagement:** track interactions within the facility



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▶▶ IV. Pricing

Daxko prices its products and services in three parts.

- The first part is your monthly fee that is based on your YMCA’s Line 33 as reported to YUSA. The fee includes all software updates, hosting, maintenance, support, online user’s center, and a number of complimentary training opportunities.
- The second part includes upfront costs that are paid upon agreement. Upfront costs include pricing for data conversion, discovery, implementation, and optimization and training.
- The third part is for Daxko staff travel/accommodations for discovery, training, and launch.

▶▶ Daxko Operations – 5 Year Agreement

Description	Amount
Comprehensive monthly cost is based on an average of 0.95% of Line 33 (\$255,938) or monthly minimum of \$500	\$500 per month
Software cost by module	All modules are included in the monthly fee
Member Management	Included
Program Management	Included
Fundraising	Included
Transaction Processing	Included
Online Registration	Included
Custom Reporting	Included
Daxko Child Care	Included
One-Time Setup Fees	Amount
Training: 40 hours on-site training - travel expenses not included	\$1320
Implementation, Configuration, and Adoption	\$4290
Data Conversion	\$1980
Total Upfront	\$7590 Waived when purchased with Daxko Engage
Transaction Costs	Amount
Bank Draft	\$0.17 per item
Credit Card	\$0.08 per item
Returned Bank Drafts	\$4.00 per item

▶▶ Daxko Engage – 5 Year Agreement

Description	Amount
Comprehensive monthly cost is based on active membership units at \$0.25 per active unit per month	\$0.25 per unit per month
Ongoing support and annual maintenance	Included
One-Time Setup Fees – Paid Upfront	Amount
Implementation, configuration and conversion	\$0
Web-based training	\$500
Total Up fronts	Waived



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▶▶ What's included?

With Daxko's "on-demand" model, we provide ongoing development, updates, technology services, and support for one predictable monthly license fee. 600+ YMCAs have realized the value in this model. Our customers commonly cite the following as their top three reasons for choosing Daxko's on-demand delivery:

Continuous Development & Software Releases

With our complete focus on YMCAs and our reinvestment into research and development, Daxko delivers more new capabilities than any other YMCA provider by a very wide margin.

Software, Database, & Security Management

With Daxko's model of providing software as a service, our advanced hosting and technology management services provide your Y with security and peace of mind. Daxko takes care of updates, security, availability, and back-ups, so your staff can focus on member service.

Partner Integrations

Daxko's YMCA network has attracted the attention of a number of third-party partners. Companies like ADP, MAGIC, and e-Cashflow have all integrated with Daxko Operations and Daxko Accounting solutions to extend your software and optimize your investment.

▶▶ Support

Daxko's Support Team does a lot more than resolve technical questions. In fact, the majority of the cases handled by our team are related to business practices, configuration, and optimization of our software.

- Toll-free support line, 7 am – 7 pm CST Monday through Friday
- E-mail support
- Two-hour response time during business hours
- Online case tracking
- Access to Solutions Finder, a knowledge base of over 700 topics

▶▶ Implementation

Daxko's Implementation Team has successfully launched hundreds of YMCAs. From analysis of current business practices to launch, your association will benefit from proven processes that come with experience. The following implementation milestones ensure that your YMCA will reach launch day with minimal disruption to the important work of your mission.

Getting Started

Daxko will assign your association an implementation project manager. The process starts with phone calls to give you a clear understanding of the implementation process and to review a customized implementation timeline with your implementation team.

Discovery Phase

Your Daxko project manager will document your current business practices, from accounting to membership types. During this phase you will also receive recommendations on certain practices.

Launch Site Configuration

One of the most exciting parts of your implementation is delivery of the launch site. Think of it as a trial run, allowing you to make sure that your software is configured the way you want it, weeks before you actually launch.



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Launch

Daxko will assist with hardware setup, review your Daxko Operations configuration in preparation for launch, and remain onsite for launch day support.

▶ Training

Onsite Training

Daxko Trainers will conduct in-person training tailored to the specific needs of your association. We'll cover content based on association requests, including:

- Membership
- Guest pass and prospect tracking
- Online registration
- Program setup and reporting
- Custom Reporting
- Financial processes and audits
- Fundraising campaign management

Adoption Services

Daxko's Adoption Services Team helps you set specific strategic objectives and develop a tactical plan to achieve them. Our services are designed to move you along the path of achieving greater levels of efficiency, effectiveness, and excellence!

Let our Adoption Services Team help you:

- Reduce learning curves and leverage Daxko's expertise in automated processes
- Optimize your investment using proven best practices
- Drive adoption of key product features, configured for your unique business practices
- Ensure that staff members are prepared for strategic shifts through customized training and follow-up
- Identify potential areas of concern through analysis of current processes