

Retreat Guru Decision Meeting

January 5, 2024

Present:

Meeting objective: Review findings of Phase I and decide whether to move to Phase II.

Specifically:

- Generally understand what the RG platform and team offer
- Understand any gaps and how they would be addressed
- Discuss and gather input to make final decision, including financial considerations
- Note any considerations/questions for process going forward

Agenda:

1. Centering
2. Overall impressions (1 round, 1-2 minutes each person)
3. Great/adequate fits and/or advantages (*10 mins*)
4. Gaps: customizations / process changes (*20 mins*)
5. Financial considerations and decision (*20 mins*)
6. Questions or Considerations / Next Steps / Action Items (*10 mins*)
7. Misc: Anything not covered/unexpected/especially useful to share? (*10 mins*)

Notes:

1. Centering
2. Overall impressions of the software, the team (namely Dennis)
 - a. Gives a great solution for our needs. There will be a loss
 - b. The fact that other retreat centers are using it effectively is encouraging
 - i. Himalayan Institute
 - c. Agreement that there's not another good option, and the other retreat centers that are using it
 - d. Optimistic that RG wants to grow their tool, and that potentially we could be partnered with
 - e. Reserving final opinion to the end of this meeting. From the meetings,
3. Great/adequate fits and/or advantages
 - a. Finance
 - i. Robust, accessible reporting functions and filtering capabilities
 - ii. Stripe is supported if we want to continue with that payment processor.
 - iii. ACH still supported
 - iv. Good functionality
 - b. Business Development

- i. The “Rentals” (the quote/contract-building function) module adds considerable value in terms of supporting the process with automated communications into a streamlined platform. Will save considerable time as the “renter” can go from proposal to contract and an automated link to pay deposit within one click.
 - ii. Ease of customized contracts and templates
 - iii. Pricing templates will be incorporated into the new version, no customization needed
 - c. Guest Services
 - i. Lodging costing is both an advantage and a gap/process change, and is one of the biggest gaps/changes we will need to factor in. The advantage is that we will have fixed prices for the lodging which will prevent us from having to call guests to pay more than their original quoted amount.
 - ii. Day Programs / Day Visits (Mountain Experience, etc) will be a bit of a clunky process, and a little complex to get them up and running, but nonetheless is possible, with some ongoing management. One benefit is that we can easily restrict future booking dates.
 - iii. Tiered pricing - yes capability
 - iv. “Add-ons” capability: Can be used to create sign-ups for yoga class/hike, could be used to add credit at KKWC, etc
 - v. Carpooling: comparable functionality (although different process) to Reg. May want to consider a zap to an outside app or some other solution, because this is an ongoing request from guests.
 - vi. Can register multiple guests
 - d. Marketing/Communications
 - i. Native integration with Mail Chimp
 - ii. Multiple pre-arrival, post-visit emails which can be styled
 - iii. Look and feel are good
 - iv. API
 - e. General Ops
 - i. The BEO (similar to Reg’s SUM) is adequate and/or more robust.
 - ii. Some potential advantages in the housekeeping processes.
 - f. Other

4. Gaps: process changes

**Consider impactful gaps, possible consequences, additional cost, timing etc.*

**Do you have any concerns that would cause you to be less than a “yes”?*

- a. Finance
- b. Business Development
- c. Guest Services
 - i. Lodging costing: Biggest gap between the two systems. This will take some front-loaded work to determine costs for room types, and a change in our thinking, processes, and messaging as/if we roll it out.

- ii. Badges (for lanyards): RG offers an exportable file (CSV), which would need to be imported into a label making file.
 - iii. Gift Cards: RG offers personal credit which can be applied to registrations
 - iv. No desktop terminal
 - v. Memberships: We can use Retreat Guru to store/manage the member information and collect payment, but obviously it is not custom-built for our processes, so we'd need to translate, or use a different CMS altogether (like our donor software)
 - vi. Calendar views are different (although they do contain most of the same info). RG doesn't offer the option of a URL view, as we have now with Reg.
 - d. Marketing/Communications
 - e. General Ops
 - f. Other
- 5. Financial considerations and Decision (*more details at very bottom of this document*)
 - a. Acknowledgement that this is a real cost to the organization
 - b. Expecting "relatively small one-time costs". We will get that number next week, when the software developers are back.
 - c. **Subscription Pricing for the Enterprise plan** (for which we qualify with sales forecast of \$2.7M):
 - i. **With Paysafe**: initial monthly invoice of \$1800.

$$\$1800 = \$2,700,000 \times 0.80\% / 12$$
 - ii. **Other processor (Stripe)**: initial monthly invoice of \$2250.

$$\$2250 = \$2,700,000 \times 1.00\% / 12$$
 - d. **Terms and Pricing Details:**
 - i. Billing is a recurring subscription that begins on the start date of Phase 2. Pricing is initially determined by our sales forecast for the next 12 months. A subscription set in this manner will be reviewed after six months. The subscription basis will be updated if the trend indicates significant variance from our original sales forecast. After the initial 12-month term, ongoing subscriptions will be based on actual sales over the past 12 months.
 - ii. With a 12-month sales forecast of \$2.7M, we qualify for the Enterprise plan with a plan rate of 0.80% and a monthly minimum of US\$880. This 0.80% rate includes a discount for processing credit cards through Retreat Guru's affiliate relationship with Paysafe/Netbanx. If we process credit cards with another supported integration, plan rate is 1.00%.
 - e. Decision factors
 - i. Think

6. Next Steps / Action Items:

- a. Lingering larger questions, to be answered later, but wanting to surface here so everyone is aware of what the project involves. Open for input today, and will require ongoing decisions as we go:
 - i. Paysafe or Stripe?
 - ii. Monthly or annual payment?
 - iii. Data import - how much historical info to import? Who will handle the formatting of data for the import?
 - iv. Where will the Membership process live?
 - v. How will the configuration of Retreat Guru be completed?
 - vi. Timing - what is the best 30-day window? aiming to be completed and staff trained by beginning of the busy season, **ideally May 2024**.
 - vii. What is the contingency plan if they don't do well?

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Gaps between Reg and RG

Reg and RG have “toiled in the same soil”. They share many similar terms and functionalities. Yet, there are many differences. Over the many years they have evolved in quite different directions. And used quite a different “technology stack”.

The differences in functionality are listed below. The lists are incomplete.

Two big differences are not in functionality but in cost and support.

- Reg is free (except for AWS hosting costs) and has dedicated support from Sahadev - a retired engineer with no other job. He can quickly make any custom modifications that are needed. Of course, he is just one person and if he should meet an untimely demise what then? There ARE two expert engineers - John Napiorkowski and Shankar Neelakantan - who have some familiarity with Reg and could help out. They are not free and would not be as efficient as Sahadev.
- RG has a monthly fee and support is from a team and an entire company. They do not make custom modifications. They do have 300+ other clients so MMC would need to "get in line" for support questions. Perhaps we could ask for help from other centers (Esalen, Spirit Rock, etc) who use RG?

In Reg Not in RG?

From Sahadev: This is a list of possible gaps: functionality present in Reg that RG may not have. It is not complete. Sahadev presented most of these at the one meeting he attended with Dennis.

- Badges
- Affiliations - Not sure if RG has this concept. Solved with tags.
- Gift Cards - I did find this: <https://help.retreat.guru/knowledge/gift-certificates>
- HFS Membership - and the discounts
- Meal Requests - to add on to the 'meal list'.
- The Grid - RG has a different way - enter names and emails and those people get an email to finish their registration and pay.
- Mountain Experience - and ways of controlling the days it is offered.
- PRs - and days on which a PR is not allowed... solved as RG tracks room inventory.
- Events - not a Rental or Program - like a holiday or special event
How to add them to the calendar in RG?
- The Calendar in Reg and the Venue Bookings menu in RG are quite different.
They share some things but behave quite differently.
- The DailyPic (and ClusterView) in Reg and the Room Bookings menu in RG are quite different. They share some things but behave quite differently.
- I'm curious about their 'meal list' and 'make up list' (for housekeeping).
- Users in Reg have 17 different roles (what they can/can't do). RG has just 4.
- I wonder if rooms can have different costs for different programs...
RG has Lodging Types which include a cost.
Reg has two things - Housing Types and Housing Costs.
These are very different from the Lodging Types in RG
and are likely not compatible.

In RG not in Reg?

From Sahadev: RG has some very nice features that Reg does not. This list is incomplete as I do not know RG very well.

- Rental inquiry questions are easily added/modified. Also admin-only fields.
- Second stage of rental inquiries.
- A nice log of emails sent to the inquirer.
- Many "template codes" - for easily edited multiple custom contracts, quotes, emails, and confirmation letters.
- Easily modified questions for the online registration sections - customizable on a per program basis.
- Knowledge Base for online help - Reg's online help is outdated and incomplete
- A choice of credit card payment processors? Reg has just Stripe.
- Filters and custom reports on most tables. Is this needed even to see all registrations for a given program?
- Easily exported data to .csv files for most tables (transactions, etc).

- Captcha verification for rental inquiries - nice but also annoying
- A way to submit requests for new features - which are not often created. Most are "awaiting feedback".
- Auto assigned rooms - gender based - nice.
- Online registration can see if a lodging type is "sold out".
- Can drag/drop people to reassign rooms.
- User interface elements are more "standard" than Reg. Perhaps better or easier to train staff?

Other Centers using RG

Sahadev had Zoom calls with the directors of Hollyhock and Himalayan Institute. He exchanged an email with the director at Yasodhara. These are his notes from those conversations. Also see a "case study" from RG about Spirit Rock.

Hollyhock

Notes from a conversation with Peter Wrinch of Hollyhock (B.C. Canada) on 12/13/23. His email: peter@hollyhock.ca A link to their web site: <https://hollyhock.ca>

He was glad to offer some "straight shootin" about RG.

He started with Hollyhock in 2017. At that time they were using a simple custom Microsoft Access database. They had no online registrations at all so it was rather awkward.

They went live with RG in 2019.

Yes, they migrated data to RG.

"RG is not perfect". But he complimented them in that they DO have a "similar value system" - they are retreatants first and business people next...

He wondered out loud what would happen if RG went bankrupt. They *could* get their data out (in .csv format) but what would they do with it?

Their programming API is not very robust.

The connection between RG and Quickbooks was awkward, he said.

He rates their support a 7 out of 10.

He noted that the 1440 retreat center (in Scotts Valley <https://www.1440.org/>) does not use RG. They apparently use some kind of hotel software - I see [eventbrite.com](https://www.eventbrite.com).

He recently visited Kripalu <https://kripalu.org/> and was impressed with how integrated their systems were. He got a lanyard when he arrived and when he made a purchase in the bookstore (or cafe) he simply showed his lanyard and the charge was automatically added to his bill. I see that Kripalu does not use RG. Online booking happens at a site named rsws.kripalu.org. I don't know what rsws is...

I was telling Peter briefly about Reg and how it has been in development since 1987. I used the term 'bespoke' and he understood it to mean "made for a particular customer". The term 'bespoke' *could* be interpreted as a derogatory term. Another term for Reg might be 'legacy' software.

Then I noted that the Retreat Guru software was first designed for a specific retreat center. Then Cameron and Deryk together decided to offer it to other centers. So RG was *also* 'bespoke' at one point.

I told Peter I was not a businessman so never really considered trying to "commercialize" Reg. Peter said, "Yes, the issues of support and sales are not easy to manage..."

Another definition of "legacy software" is software **that works**.

Himalayan Institute

Notes from a conversation with Stephen Moulton of Himalayan Institute (H.I.) (in Pennsylvania) on 12/11/23.

His email: smoulton@himalayaninstitute.org

Link to their web site: <https://himalayaninstitute.org/>

Stephen was very glad to share his thoughts on RG. He is open to a follow-up conversation.

He has been there for 13 years. His wife, Judy, is a teacher of Ayurveda.

H.I. seems to be a direct analog of MMC - 70 residents - Yoga, Ayurveda programs.

50% of their business is rentals of their facilities to other groups.

They transitioned to RG 3 years ago - from a system they were using called 'wrp' or WebResPro (hotel software) plus some homegrown software as well.

He said there is really no other option aside from RG. Hotel type software just doesn't work very well for a retreat center.

He was complimentary about the RG support staff. "They stick with you".

One thing they really like - a public link to give to leaders to see how many registrations have come in - no login required

They migrated only unpaid balances - but not the details of the pricing. When migrating contacts (people) he said it was important to eliminate duplicates. [RG has said they only migrate registrations not people so I'm confused about this...]

They have made several suggestions for improvements to RG - but few have been implemented. RG does not do many custom modifications. They are (understandably) very conservative - given how many other clients they have.

H.I. has, however, contracted with a developer in India to create some custom software to improve the housekeeping make-up list provided by RG.

Yasodhara

An email from Catherine at Yasodhara (in B.C., Canada) on 12/12/23.

Her email: registrations@yasodhara.org

A link to their web site: <https://www.yasodhara.org/>

In December 2022 Yasodhara was considering a move to RG. They had completed the phase one process with RG.

We put our tech stack process on hold for a year and didn't move ahead with Retreat Guru. We found it quite a complicated process to think through a tech stack, and we are wanting to include a CRM and new gift store retail software in the whole picture. We decided to take a breather.

We continue to use Eventbrite for our online programming - for short classes, day-long retreats, series and free information sessions. We find that it works quite well. For your interest, here is a link to our upcoming events (there is not much, because we are nearing the end of our fall program):

[Yasodhara Ashram Online Classes](#)

Spirit Rock

From RG: [case study on Spirit Rock](#)

Spirit Rock had a haphazard collection of unrelated tools.

Moving to RG was a "no-brainer".

Email Thread with Dennis

November 2021 through March 2023:

<https://akash.mountmadonna.org/static/help/RG.html>

One email from Dennis detailed the technology used in RG:

RG is implemented in WordPress and PHP and Javascript? RG is implemented in Wordpress, PHP, and Javascript with a little bit of Vue.js and node / npm.

Git for source control? Yes, Git is used for source control.

What database? MySQL

What javascript libraries? We use assorted javascript libraries. Most notable are jQuery and Alpine.js

What WP Plugins? Retreat Guru currently uses the plugins listed below. In general, Retreat Guru does not support the addition of other WP plugins by a client center.

- Classic Editor - enables the WordPress classic editor and the old-style Edit Post screen with TinyMCE, Meta Boxes, etc.
- Members - allows us to edit your roles and their capabilities, clone existing roles, assign multiple roles per user.
- Really Simple CAPTCHA - a module intended to be called from other plugins. It is originally created for my Contact Form 7 plugin.
- Send E-mails with Mandrill - Send e-mails using Mandrill. This is a forked version of the now unsupported plugin wpMandrill.
- User Switching - instant switching between user accounts in WordPress.
- WP CronControl - view and control what's happening in the WP-Cron system.

What modules/libraries in PHP? We use assorted PHP libraries delivered by composer.

Hosted on AWS? We use a managed hosting company named Pagely, which uses AWS infrastructure.

What other software is used? There are a variety of software packages running on our server managed by Pagely, but for the purposes of RG, we don't use anything outside of the standard LAMP setup (Apache, nginx, MySQL, PHP). We use RDS for MySQL, so our dB data is segmented from the server.

What is used for bug tracking? Internally, Retreat Guru uses ClickUp for bug tracking, dev sprints, product planning, etc. We use HubSpot to manage our client-facing support services.

Sidekick for email? Mailchimp? We don't use Sidekick. We use Mandrill (owned by Mailchimp) to deliver email.

Migrating Data from Reg to RG

RG has a document about Data Import:

<https://help.retreat.guru/knowledge/data-import>

It lays out the specific format required.

RG only allows import of registrations, programs, teachers, transactions (charges and payments), rooms, and lodging types.

Reg has a document:

<https://akash.mountmadonna.org/static/help/schema/index.html>

It precisely details the database schema used in Reg.

What Sahadev Will and Won't Do

Sahadev will continue to support Reg and be “on-call” for any needs relating to Reg. At no cost. This includes any needed changes and improvements. After a complete transition to RG Sahadev will convert Reg to “read-only” mode so that all the accumulated data and history will be available for consultation. The AWS machine <https://akash.mountmadonna.org> will continue to be supported.

[Talks with Babaji](#) and the [Daily Sutra from Babaji](#) (the email list) will continue to be available on akash.

Sahadev will help with exporting data from Reg but will not help with formatting the exported data for the import into RG. This task can be done by someone else. The needed technical skills are these:

- **Familiarity with SQL schemas (MySQL)**
- **Creation of CSV (comma separated value) text files (with any language - Python, Ruby, Perl, etc)**
- **Able to understand the Data Import document from RG (see above)**

Sahadev will not help with configuring RG or with training MMC staff in how to use RG. The expert staff at Retreat Guru and the project manager at MMC are much better qualified to do these things.

*** Note: The 3 items below are likely not relevant for the Retreat Guru Decision process but since this point in time could be termed the 'End of Reg' it seemed appropriate (and fun) to gather these dates, numbers, and thoughts. ****

A Brief History of Reg

- 1981 - Mailing list and affiliations, Financial software with Manohar - CBASIC on DOS
- 1987 - Began developing reg with Brajesh and the program office team. dBasell+ on SCO Unix
Later FoxPro for Unix
- 1995-1996 - Sahadev lived at MMC
Also did software for MMS.
- 2005 - online registration - at garlic.com
- 2007 - Requested bids for rewriting reg
Visited a company in Mumbai
Visited Breitenbush in Oregon and OpenSourcery in Portland.
- 2007-2009 - reg was rewritten by Sahadev - 10/2007 => 4/2009
(with a bit of help from Shankar Neelakantan)
renamed Reg
On Debian Linux, hosted on a machine at MMC.
web based, Perl, Catalyst, MySQL, image maps, core javascript
- 2013 - Babaji's stroke and convalescence
- 2016 - Considered a transition to RG, shared calendar and rental documentation and videos
- 2016 - online scripts moved to cosmic/craft in September
- 2017 - hosted on AWS - with John Napiorkowski's expert help
- 2020 - COVID pandemic - MMC shutdown.
added online programs,
vaccination certificates, Badges - with Vishwamitra
- 2021-22 - recovering from pandemic shutdown - with Savita
- 2022-23 - online scripts moved to cgi-bin on akash. Also authorize.net to Stripe.
- 2023 - Lila Lolling - guest services director
- 2023-24 - Transition to RG

Reg By The Numbers

68 tables 834 columns

265 strings for configurations

table and record counts:

user 324

people 86,775 - first one entered 12/22/1982

grid 23,006

event 1,522

program 2,444 - first one started on 11/03/1989

rental 1,516 - first one started on 3/5/1996

registration 102,619

rental payment 1,713 total \$11,403,669

reg_payment 131,992 total \$26,219,269

mmi_payment 23,157 total \$3,699,632

xaccount_payment 8,664 total \$1,476,367

total payments \$42,798,937

proposal 331 from 4/2009 to 11/2018

inquiry 548 since June 2022

Perl:

cgi-bin scripts on akash - moved from mmc.org - began June 2022

plus authorize.net => Stripe

39 scripts total 7,542 lines

controller .pm

43 files total 31,596 lines

model .pm

68 files total 7,108 lines

lib .pm

19 files total 5,717 lines

catalyst script dir

33 files total 2,870 lines

TOTAL 202 files 54,833 lines

src bin/sh scripts:

25 files total 153 lines

templates .tt2:

336 files total 19,194 lines

in cgi-bin/

42 files total 3,572 lines

in letter/

38 files total 3,283 lines

TOTAL 416 files 26,049 lines

style sheets .css:

10 files total 1,328 lines

help files .html:

55 files total 9,000 lines

timelogs:

35 invoices 2007-2020

3,178 hours at \$50 per hour = \$158,895

6,599 words in RG's 'terms and conditions'

Final Thoughts on Reg

Sahadev did not have children so Reg is his “baby”. Inevitably (and understandably) a certain “parental” attachment developed. This attachment manifests in these ways:

- Parents “worry” about their children even after they have become adults.
- Parents are glad when their children no longer call for cash.
- Parents are concerned about who their children choose for mates.
- Sahadev looks forward to the day when he is no longer “on call” and can say “There. Job well done”.
- Moving from ‘tailor-made’ custom software (Reg) to commercialized software (RG) (used by 300+ clients) is analogous to having one’s parents move out of their comfortable home where they have lived for 35+ years into an assisted living senior facility which is more like a hotel than a home. It is also much more expensive.
- At one point Rajendra said, “It takes years to get it right.”
- On September 9th, Rashmi said, “I know we will lose a lot of function we are used to when we switch to Retreat Guru. It will be sad, the end of a long successful era.”

After the transition to RG is complete MMC will be very glad to have the security of using mission-critical software supported by a deep robust team rather than ‘bespoke’ software supported by just one vulnerable individual.

More Detailed Info re: Subscriptions

Your Retreat Guru RMS is a recurring subscription that begins on the start date of Phase 2. Plan eligibility is initially determined by your sales forecast for the next 12 months. Sales include all transaction items and discounts entered into Retreat Guru, including tuition, lodging, meals, donations, application fees, retail purchases, etc.

A subscription set in this manner will be reviewed after six months. The subscription basis will be updated if the trend indicates significant variance from your original sales forecast.

After your initial 12-month term, ongoing subscriptions will be based on your actual sales over the past 12 months.

Each subscription plan specifies a basis, rate, and monthly minimum.

- *Basis* - initially, your 12-month sales forecast, and ongoing, your rolling past 12 months' sales.
- *Rate* - a percentage of the basis.
- *Minimum* - the minimum monthly invoice for your plan.

Your monthly invoices will be calculated as follows: $Invoice = Basis \times Rate / 12$

Your ongoing monthly invoices will show a calculated amount or the monthly minimum, whichever is greater.

On your billing date, if rolling past 12 months' sales:

- Are within 10% (over/under) of your current subscription basis - your next month's invoice will remain the same.
- Vary more than 10% (over/under) of your current subscription basis - you will receive an email notification that your next month's invoice will use the new sales total as your new subscription basis. You will receive at least 30 days' notice that your subscription basis has changed, and your next month's invoice will be affected.

Initial Monthly Invoice

With a 12-month sales forecast of \$2,700,000, you qualify for the Enterprise plan with a plan rate of 0.80% and a monthly minimum of US\$880. This 0.80% rate includes a discount for processing credit cards through Retreat Guru's affiliate relationship with Paysafe/Netbanx. If you process credit cards with another supported integration, your plan rate will be 1.00%.

Paysafe - with a 12-month forecast of \$2,700,000 and with credit card processing via our integration with Paysafe/Netbanx, your initial monthly invoice will be \$1800.

Initial monthly invoice = $Basis \times Rate / 12$

\$1800 = $\$2,700,000 \times 0.80\% / 12$

Other processor - with credit card processing via integration with another supported processor, your initial monthly invoice will be \$2250.

$$\text{Initial monthly invoice} = \text{Basis} \times \text{Rate} / 12$$

$$\$2250 = \$2,700,000 \times 1.00\% / 12$$

As we discussed, you could start with monthly invoices through September and switch to an annual subscription invoice in October to align with your fiscal year.