

REQUEST FOR PROPOSAL: Technical Exploration – CAC’s IT and Locker

REQUEST FOR PROPOSAL	Locker Database – IT Technical Assessment and GAP Analysis (Phase-1) and Locker Architecture, Planning, and writing the technical project charter for the Locker database revamp (Phase-2)
PROJECT	<p>Phase 1 Objectives:</p> <ol style="list-style-type: none"> 1. <i>High-Level System Understanding</i> 2. <i>IT Infrastructure Assessment</i> 3. <i>API Functionality Assessment</i> 4. <i>Stakeholder Engagement (Internal)</i> 5. <i>User Experience (UX) and User Interface (UI) Assessment</i> 6. <i>Gap Analysis</i> 7. <i>Documentation and Reporting</i> <p>Phase 2 Objectives:</p> <ol style="list-style-type: none"> 8. <i>Detailed Locker Architecture Understanding</i> 9. <i>Service Agreement Assessment Per Mandate and find opportunities/and or risks to fill gaps.</i> 10. <i>Take direction from User Experience (UX) and User Interface (UI) Assessments and deliver recommendations.</i> 11. <i>Stakeholder Engagement-External</i> 12. <i>Find gaps, analyze them, and create planning for a solution.</i> 13. <i>Create the future project plan and charter.</i> 14. <i>Documentation and Reporting and help in completing the Anex-3 Application</i>
PROJECT DEADLINES	<p>Phase 1 should be completed by May 15, 2024</p> <p>Phase 2 should be completed by August 31, 2024</p> <p>Final invoice by August 31, 2024</p>
PROPOSAL SUBMISSIONS DUE	April 16, 20:00 EST

INSTRUCTIONS TO AGENCIES

The objectives for Phase 1 and Phase 2 of the project are structured to systematically enhance the system's capabilities, engage with stakeholders, and ensure thorough documentation and planning for future improvements.

In Phase 1, the focus is on gaining a comprehensive understanding of the current system and its IT infrastructure, assessing the functionality of existing APIs, and identifying any gaps between current capabilities and desired outcomes. A critical component of this phase is engaging with internal stakeholders to gather insights and feedback, which complements the evaluation of the user experience (UX) and user interface (UI). The culmination of Phase 1 involves thorough documentation and reporting of findings and assessments.

Phase 2 builds on the foundational knowledge and assessments conducted in Phase 1, with a specific emphasis on understanding the detailed architecture of the locker system. This phase aims to identify and analyze gaps discovered earlier, devising plans to address these issues. It also includes a thorough assessment of service agreements to identify opportunities or risks and further act based on the UX and UI assessments to improve user interaction with the system. Engaging with external stakeholders becomes a priority in this phase to ensure broader input and support for the project. The phase concludes with creating a detailed future project plan and charter, alongside comprehensive documentation and reporting, which will support the completion of the Anex-3 Application.

These phases ensure a holistic approach to system improvement, from understanding and assessment to planning and execution, emphasizing stakeholder engagement and user experience.

Proposal Due Date: Saturday, April 20, 20:00 EST

Please forward your proposal to:

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BACKGROUND

The Coaching Association of Canada (CAC) and The Locker represent a dynamic synergy in sports coaching and athlete development in Canada. The Locker, an innovative online platform developed by the CAC, is a central hub for coaches nationwide to access a wealth of resources, tools, and educational materials. This strategic initiative underscores the CAC's commitment to leveraging technology to enhance the coaching profession and, by extension, enrich the sporting experience for athletes at all levels.

The Locker is designed to cater to coaches' multifaceted needs, offering various features such as tracking professional development, managing certifications, and accessing tailored educational content. This platform facilitates a seamless interaction between coaches and the broader coaching community, enabling the sharing of best practices, insights, and strategies. Through The Locker, the CAC ensures that coaches, irrespective of their sport or level of expertise, have the necessary resources to promote athlete development, ethical coaching practices, and a positive sporting environment.

One of The Locker's key aspects is its role in the certification and accreditation process for coaches. It serves as the official record for Canada's National Coaching Certification Program (NCCP) status, making it an indispensable tool for coaches to verify their credentials and for

organizations to confirm the qualifications of their coaching staff. Additionally, The Locker provides access to cutting-edge research, webinars, and workshops covering various topics, from technical skills to mental health awareness in sports. Furthermore, The Locker is not just a repository of information for coaches.

The Locker epitomizes the CAC's vision of empowering coaches with the knowledge, skills, and support they need to excel in their roles. It represents a significant step in professionalizing the coaching industry, ensuring Canadian athletes benefit from high-quality, informed, and ethical coaching. Through The Locker, the CAC is not just nurturing coaches; it's enhancing the fabric of Canadian sports culture for generations to come.

PROJECT DESCRIPTION

This project is designed as a comprehensive, two-phase approach aimed at enhancing the effectiveness and efficiency of our current systems, mainly focusing on the integration and optimization of The Locker platform. By meticulously following this step-by-step approach, we aim to understand and improve our existing IT infrastructure and ensure that internal and external stakeholders are actively engaged in the process, fostering a user-centered design for The Locker. Each project phase has its distinct objectives and rationale, as detailed below.

Phase 1 Description:

1. High-Level System Understanding

Rationale: The initial step involves thoroughly understanding the current system's architecture and functionalities. This foundational knowledge is critical for identifying areas of improvement and potential integration points with The Locker.

2. IT Infrastructure Assessment

Rationale: Assessing the existing IT infrastructure allows us to identify the current capabilities, limitations, and scalability options. This information is vital for ensuring the infrastructure can support the envisioned improvements and integrations.

3. API Functionality Assessment

Rationale: APIs play a crucial role in integrating various systems and services. Evaluating the current APIs' functionality helps us understand how different systems communicate and how these interactions can be enhanced.

4. Gap Analysis

Rationale: Conducting a gap analysis between the current system capabilities and the desired state allows us to pinpoint specific areas that require attention. This process informs the prioritization of subsequent actions.

5. Stakeholder Engagement (Internal)

Rationale: Engaging with internal stakeholders early on ensures that the project aligns with the broader organizational goals and leverages internal insights. This engagement fosters buy-in and supports the identification of user needs and expectations.

6. User Experience (UX) and User Interface (UI) Assessment

Rationale: Assessing the current UX and UI provides insights into how users interact with the system. Improving these aspects ensures the system is intuitive, accessible, and efficient for all users.

7. Documentation and Reporting

Rationale: Comprehensive documentation and reporting of findings from Phase 1 are essential for transparency and for informing Phase 2 strategies. This step ensures that all stakeholders are aligned and that there is a clear record of the project's progress.

Phase 2 Objectives

8. Detailed Locker Architecture Understanding

Rationale: Building on the high-level system understanding from Phase 1, this step involves delving deeper into The Locker's architecture. A detailed understanding is crucial for identifying integration points and optimization opportunities.

9. Find Gaps, Analyze Them, and Create Planning for a Solution

Rationale: With a detailed understanding of The Locker's architecture, the focus shifts to identifying specific gaps, analyzing their implications, and planning actionable solutions. This targeted approach ensures efficient resource allocation.

10. Service Agreement Assessment Per Mandate

Rationale: Assessing service agreements in light of organizational mandates allows us to identify opportunities and risks related to compliance, service quality, and partnerships. This assessment ensures that the project remains aligned with legal and operational standards.

11. Taking Direction User Experience (UX) and User Interface (UI) Assessment

Rationale: This step involves revisiting the UX and UI assessments with a more focused approach based on Phase 1 findings. The goal is to refine the user interface and experience based on detailed feedback and analysis.

12. Stakeholder Engagement-External

Rationale: Engaging with external stakeholders, including users and partners, provides valuable perspectives that can further refine the project's direction. This engagement ensures that the system meets the needs of a broader audience.

13. Create the Future Project Plan and Charter

Rationale: With all the insights gathered, the next step is to draft a comprehensive project plan and charter for future initiatives. This document will outline the project scope, objectives, timeline, and resources required, serving as a roadmap for implementation.

14. Documentation and Reporting and Help in Completing the Anex-3 Application

Rationale: The final step involves documenting the outcomes of Phase 2, including the future project plan. Completing the Anex-3 Application requires detailed reporting to support funding or regulatory approvals. This documentation ensures accountability and supports future project phases.

This structured, two-phase approach allows for a systematic evaluation and enhancement of The Locker and associated systems. By focusing on both the high-level and detailed aspects of system architecture, stakeholder engagement, and user experience, the project aims to deliver significant improvements in functionality, user satisfaction, and operational efficiency.

Budget

- \$ to be invoiced across 12 Weeks:
 - Phase 1 – May 15, 2024: \$25,000 (including HST)
 - Phase 2 – August 31, 2024: \$75,000 (including HST)

OBJECTIVES

Phase 1 Objectives: Foundation and Assessment

- **High-Level System Understanding:** To develop a comprehensive overview of the current system's architecture, including its components, functionalities, and interactions. This knowledge base will inform all subsequent assessments and strategies.
- **IT Infrastructure Assessment:** This evaluation will evaluate the existing IT infrastructure's capacity, performance, security, and scalability. It will identify strengths, weaknesses, and areas for technological advancements to support the system's future needs.
- **API Functionality Assessment:** To thoroughly examine the existing Application Programming Interfaces (APIs) to understand their capabilities, limitations, and how they facilitate data exchange and integration between systems. This will highlight areas for improvement in system connectivity and functionality.
- **Gap Analysis:** To systematically identify discrepancies between the current system's capabilities and the desired objectives. This analysis will focus on uncovering functionalities, performance, and user experience deficiencies to prioritize future developments.
- **Stakeholder Engagement (Internal):** To actively involve internal stakeholders, including management, technical teams, and end-users, in the assessment process. This engagement gathers comprehensive insights, requirements, and expectations to align the project with organizational goals and user needs.
- **User Experience (UX) and User Interface (UI) Assessment:** To thoroughly evaluate the current system's user interface and overall user experience. This includes usability studies, interface design, navigation, accessibility, and efficiency, aiming to identify areas for enhancement to meet user expectations better.
- **Documentation and Reporting:** To compile and document findings, analyses, and recommendations from the assessments conducted in Phase 1. This comprehensive reporting will provide a clear basis for the planning and execution phases that follow, ensuring transparency and alignment across project stakeholders.

Phase 2 Objectives: Planning and Execution

- **Detailed Locker Architecture Understanding:** To acquire an in-depth understanding of The Locker's specific architecture, including its modules, interfaces, data flows, and third-party integrations. This knowledge is crucial for identifying specific areas for optimization and integration.
- **Find Gaps, Analyze Them, and Create Planning for a Solution:** Building on the initial gap analysis, this objective focuses on a deeper exploration of identified gaps, particularly within The Locker's architecture. It involves analyzing these gaps' root causes and planning actionable, strategic solutions.

- **Service Agreement Assessment Per Mandate:** To assess existing service agreements against organizational mandates and requirements. This entails identifying opportunities for renegotiation, aligning with strategic goals, and proactively pinpointing potential risks and liabilities to mitigate them.
- **Taking Direction User Experience (UX) and User Interface (UI) Assessment:** To refine the UX and UI strategies based on Phase 1 assessments and additional insights. This includes designing and implementing targeted improvements to enhance the user interface and overall experience, guided by user feedback and best practices.
- **Stakeholder Engagement-External:** To extend the engagement process to external stakeholders, including partners, customers, and third-party service providers. This objective aims to gather external perspectives, validate assumptions, and ensure the project's external alignment and support.
- **Create the Future Project Plan and Charter:** To develop a detailed project plan and charter for the following system enhancement and integration stages. This document will outline objectives, strategies, timelines, resource allocations, and responsibilities, serving as a roadmap for execution and governance.
- **Documentation and Reporting and Help Completing the Anex-3 Application:** To finalize comprehensive documentation and reporting of Phase 2 outcomes, including the future project plan. This includes assisting in completing the Anex-3 Application and ensuring that all necessary information and justifications are accurately and effectively presented for approval or funding processes.

These elaborated objectives for Phases 1 and 2 articulate a strategic, systematic approach to system assessment, stakeholder engagement, and planning. The project aims to significantly enhance The Locker's architecture and user experience by following these objectives, ensuring it meets and exceeds current and future needs.

PROJECT TIMELINES

RFP distributed:	by April 12, 2024
Further discussions/presentations with agencies:	by April 19, 2024
Proposal submissions are due	April 20, 20:00 EST
Agency selection:	by April 22, 2024
All invoices for Phase 1 (April 20-May 15)	by May 15 th , 2024
All invoices for 2023-24 (May 20- August 31)	by August 31, 2024

ADDITIONAL PROJECT INFORMATION

Phase 1: Foundation and Assessment

Project Boundaries:

- During this initial stage, the project will not involve direct modifications to the Locker Database but will focus on assessment and planning.
- Access to the API and more profound technical components will be subject to client provision.

Assumptions:

- Stakeholder cooperation and access to necessary data and system components will be provided.

- All required access for assessments will be granted by Day 3 of the engagement.

Constraints:

- Limited by the 2–3-month timeframe and the initial budget estimate.
- Dependent on stakeholder availability and cooperation for feedback and meetings.

Acceptance Criteria:

- Delivery of all outlined reports and documentation.
- Comprehensive stakeholder engagement and feedback analysis.
- Detailed technical and security assessment with actionable recommendations.
- Clear communication and collaboration strategy for project stakeholders.

Project Stakeholders:

- CAC Executives
- Locker Database internal users (CPS)
- IT and Dev Teams
- External Consultants (Interlysin)
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Phase 2: Expansion and Strategic Planning

Project Boundaries:

- No direct alterations to the Locker Database structure or content will be executed. The primary focus will be on comprehensive analysis and strategic planning.
- In-depth technical component access, including API access, will require explicit provision by the client to facilitate detailed assessments and future recommendations.

Assumptions:

- Stakeholders' active collaboration and timely access to data and system components are expected to be consistent throughout the project.
- The necessary permissions and access for in-depth assessments are anticipated to be secured by the third day of active project engagement.

Constraints:

- The project timeline is confined to a 2–3-month period, following the initial budget estimations, creating a strict window for project completion.
- The project's momentum and progress depend on stakeholders' availability and readiness to participate in discussions, provide feedback, and attend crucial meetings.

Acceptance Criteria:

- Punctual delivery of all specified reports and supporting documentation per the project schedule.
- Extensive engagement with stakeholders and a thorough analysis of their feedback, leading to informed project outcomes.
- Rigorous technical and security evaluations will be conducted, culminating in viable recommendations that can be acted upon in subsequent phases.
- Establish transparent and effective communication channels and collaboration strategies among all project participants.

Project Stakeholders:

- Executives from the Coaching Association of Canada (CAC).
- Users of the Locker Database, encompassing coaches and National Sport Organizations (NSOs).
- Internal Information Technology (IT) and Development (Dev) teams will play a vital role in the technical evaluation and future implementation stages.
- External Consultants from IntellySin, tasked with providing specialized insights and augmenting the project's technical acumen.

PROPOSAL EVALUATION

All proposals are appreciated, and those who best meet the proposal's objectives will be selected for subsequent meetings and presentations. The following criteria will be used in evaluating RFP submissions:

In the context of the Locker Database Modernization project for the Coaching Association of Canada (CAC), focusing on high-level system understanding, stakeholder engagement, and user experience without backend access, the vendor proposal criteria should be comprehensive to select the most capable vendor. Here are the requirements to consider:

1. Company Profile and Experience:

- Years of operation and stability of the vendor.
- Relevant experience in database modernization projects, especially in non-profit or sports sectors.
- Success stories or case studies demonstrating the vendor's ability to deliver similar projects.

2. Understanding of Project Scope:

- Clarity in understanding the project's objectives, especially regarding system understanding, UX/UI assessment, and IT infrastructure without backend access.
- Demonstrated knowledge of working within constraints (e.g., no backend access) while delivering comprehensive assessments.

3. Methodology and Approach:

- Detailed approach to achieving high-level system understanding and conducting gap analysis without backend access.
- Strategy for engaging with stakeholders to gather comprehensive feedback. Approach for conducting IT infrastructure and API functionality assessments with only user-level access.

4. UX/UI Expertise:

- Proven experience in UX/UI assessments, with a portfolio showcasing previous work.
- Methodology for evaluating and recommending improvements for user interfaces and experiences.
- Strategy for ensuring the system's design aligns with modern usability standards and stakeholder expectations.

5. IT Infrastructure and API Assessment:

- Experience in assessing IT infrastructure and API functionality without direct backend access.
- Understanding modern IT infrastructure standards and best practices for secure, scalable, and efficient systems.
- Expertise in evaluating API functionality, security, and integration capabilities, even with limited access.

6. Project Management and Team Composition:

- Proposed project management methodology and communication plan.
 - Composition of the project team, including the expertise and roles of members involved explicitly in UX/UI, IT infrastructure, and API assessments.
 - Detailed Locker Architecture Understanding
 - Find gaps, analyze them, and create planning for a solution.
 - Service Agreement Assessment Per Mandate and find opportunities/and or risks to fill gaps.
 - Taking direction from User Experience (UX) and User Interface (UI) Assessment
 - Create the future project plan and charter.
 - Documentation and Reporting and help in completing the Anex-3 Application
- Availability of human resources to meet the project timeline.

7. Cost Proposal:

- Phase 1: Cost within CAD 25,000 (HST included)
- Phase 2: Cost within \$75.000 (HST included)

8. Timeline and Deliverables:

- Both the phases by August 31, 2024 (Breakdown already provided earlier)

9. Data Security and Privacy:

- Measures and protocols to ensure data security and privacy during assessment.
- Compliance with relevant data protection regulations and standards.

10. Client References and Testimonials:

- References from previous clients for whom the vendor has completed similar projects.
- Testimonials highlighting the vendor's reliability, professionalism, and quality of work.

11. Innovation and Added Value:

- Innovative solutions and technologies proposed to enhance the Locker Database's functionality and user experience.
- Added value the vendor brings to the project beyond the basic scope, such as additional insights or future scalability.

CAC KEY CONTACT DETAILS

Project:	Technical Exploration – CAC's IT and Locker
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