

OVERVIEW



- Introduction/Objectives
- Procurement of a Registration System - Overview of the Process
- Understanding your Requirements
 - Customizing a Specification of Requirements
- Undertaking a Competitive Tender Process
 - Request for Proposal (RFP)
 - Evaluation and Selection of a Vendor
- Implementation of the System

OVERVIEW



10:00 – 10:15	Introductions/Overview/Background
10:15 – 12:00	Process Overview/Requirements
12:00 – 12:45	<i>Lunch</i>
12:45 – 2:00	Requirements/ RFP
2:00 – 2:15	<i>Coffee Break</i>
2:15 – 4:15	Evaluation/Selection/Implementation
4:15 – 4:30	Wrap Up

OVERVIEW



- **By the end of this seminar attendees will...**
 - Have a high level understanding of how to undertake a fair & competitive procurement for a Sport Registration System;
 - Be able to tailor key documents required in this process, including:
 - Systems Requirements Specification;
 - Request for Proposal (RFP);
 - Services Agreement;
 - Have a high level understanding of how to manage the system implementation process

INTRODUCTION/BACKGROUND



- **Alan Ahac – Systems Strategy Consultant**
 - Former President – Volleyball Canada
 - Former Member – FIVB Board of Administration
 - 30 years experience in software industry
 - Systems Engineer, Business Process Analyst, President of a software company

INTRODUCTION/BACKGROUND



- **NSFEI** identified common need (Dec 2013):
 - “Membership Management tool that can be customized by NSF’s”
- **Objectives:**
 - Cost savings for NSF and PSO’s
 - Enhance leadership capacity by having good information on participants in the sport
 - Enhance the alignment of programs and processes from the grass-roots levels to the national level
 - ***Know your Customers!***

INTRODUCTION/BACKGROUND



- NSFEI projects to develop a common framework of requirements and process for NSF's to acquire National Registration Systems
 - Volleyball, Swimming – 1st adopters
 - Generalized to accommodate other sports
 - Separate what is common from what is sport-specific
 - Allow NSFs/PSOs the choice and flexibility to tailor the requirements and process to suit their own needs
 - Triathlon Canada engaged early in 2015

INTRODUCTION/BACKGROUND



- VOLLEYBALL CANADA:
 - RFP Nov 2013; vendor selected Mar 2014;
savings: \$2.3M over 5 years
- SWIMMING CANADA:
 - Requirements analysis and system specification produced May – Oct 2014
- TRIATHLON CANADA:
 - RFP April 2015; vendor selected June 2015;
savings: \$1.2M over 5 years

INTRODUCTION/BACKGROUND



- Common process and documents developed that can be re-used by other NSF's
 - System Requirements Specification template
 - RFP template
 - Proposal Evaluation tools
- ***NSF Workshops – February 2016***
 - Apply common processes/templates so NSF's can pursue their own Registration Systems

INTRODUCTION/BACKGROUND



- Selecting, implementing and managing a National Registration System is **hard**
 - Unlikely that one vendor/one system will work for all NSF's
 - It takes time/effort
- Strong value in NSF/PSO alignment
- Opportunity for significant \$\$\$ savings
- Focus on: **Know Your Customers!!**

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OVERVIEW OF THE PROCESS



1. Requirements Definition
 - *What do I need the system to do for me?*
2. Solution Survey
 - *Are there systems/suppliers that can meet my needs?*
3. Proposal Solicitation
 - *Request for Proposals (RFP)*
 - *Proposal evaluation*
4. Vendor selection and contract negotiation
5. System Implementation
6. Ongoing Vendor/System Maintenance

OVERVIEW OF THE PROCESS



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OVERVIEW OF THE PROCESS



Swimming Canada – Requirements Definition Process

Timeline

Define scope; establish users and stakeholders

June 2014

Business Process review relating to participants, membership, registration and events

Jun - Aug 2014

- Review Product/Service offerings at NSF, P-TSO levels
- Review current registration processes at NSF and P-TSO levels
- Analysis of current systems/data including volumetric analysis
- Review business processes that utilize participant/event information

Compile business requirements

Sept 2014

- Information Modeling: Participants, Associations, Events, Membership
- Process and Functional Requirements

Review Requirements Specification amongst stakeholders

End Sep 2014

Consolidate review comments and finalize document

Early October

OVERVIEW OF THE PROCESS



Survey the marketplace for potential system suppliers

- Current system suppliers to your PSO's
- Current system suppliers to other similar NF's
- Your current system supplier
- Internet search
- *Ahac's list...*

➤ ***DECISION POINT:*** *Go out to tender... or not...*

OVERVIEW OF THE PROCESS



Triathlon Canada – Competitive Tender Process

Produce Request for Proposal document	Feb/Mar 2015
RFP issued for Triathlon Registration System	April 14, 2015
Proposal deadline	May 15, 2015
Vendor selected	Jun 12, 2015

Triathlon Canada – Implementation Phase

Contract Completion	Jun 19, 2015
System set up and configuration complete	Aug 31, 2015
Commence Customer Acceptance testing	Sept. 15, 2015
Complete Customer Acceptance testing	Oct 31, 2015
Initial System Go-live	Nov. 1, 2015

OVERVIEW OF THE PROCESS



System Implementation:

- Stage the implementation
 - NF plus 1-2 PSO's to start;
 - plan to allow PSO's to come on board over time
- Migrating participant information from a previous system is usually very hard
- Managing the vendor is challenging
- Can be a multi-year process

OVERVIEW OF THE PROCESS



Approximate Timelines

- | | |
|--|------------------|
| 1. Requirements Definition | 1-6 mos. |
| 2. Solution Survey | |
| 3. Proposal Solicitation | |
| • <i>Request for Proposals (RFP)</i> | <i>4-6 weeks</i> |
| • <i>Proposal evaluation</i> | <i>4-6 weeks</i> |
| 4. Vendor selection and contract negotiation | 2 weeks |
| 5. System Implementation | 5-6 mos. |
| 6. Ongoing Vendor/System Maintenance | |
| • <i>Initial deployment and onboarding</i> | <i>1-3 yrs.</i> |

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REQUIREMENTS



What's a Requirements Specification...

- A specification of **what** you need the system to do for you
 - ***NOT*** a specification of ***how*** to do it

Why do a Requirements Specification?

- Clearly represents what the vendor needs to provide to you as a deliverable under your contract

REQUIREMENTS



DURING SALES PROCESS:

Customer to Vendor....

- *“you need to provide a system that meets all my needs...”*

Vendor to Customer...

- *“our system can do **EVERYTHING** you need...”*

REQUIREMENTS



AFTER CONTRACT SIGNED:

Customer....

- *“but the system doesn’t do what I need...”*

Vendor...

- *“you never told me you needed THAT...that will cost you extra...”*

REQUIREMENTS



Key Processes:

- Information Modeling
- Business Process Analysis
- Current Systems Analysis

Objective: *determine the information that we want to maintain in the system, and the procedures and functions that the system needs to provide to support the business processes*

REQUIREMENTS



Information Modeling relates to defining a model of all the entities, relationships and attributes required to support the business processes of the NF and PSO's. A registration system will typically maintain information on the following high-level entities:

- Participants (athletes, coaches, officials, administrators, etc)
- Clubs/Associations/Teams
- Events (competitions, training camps, clinics, courses, meetings, etc)
- Membership

REQUIREMENTS



- **EXERCISE:** Customize an information model for your sport.....

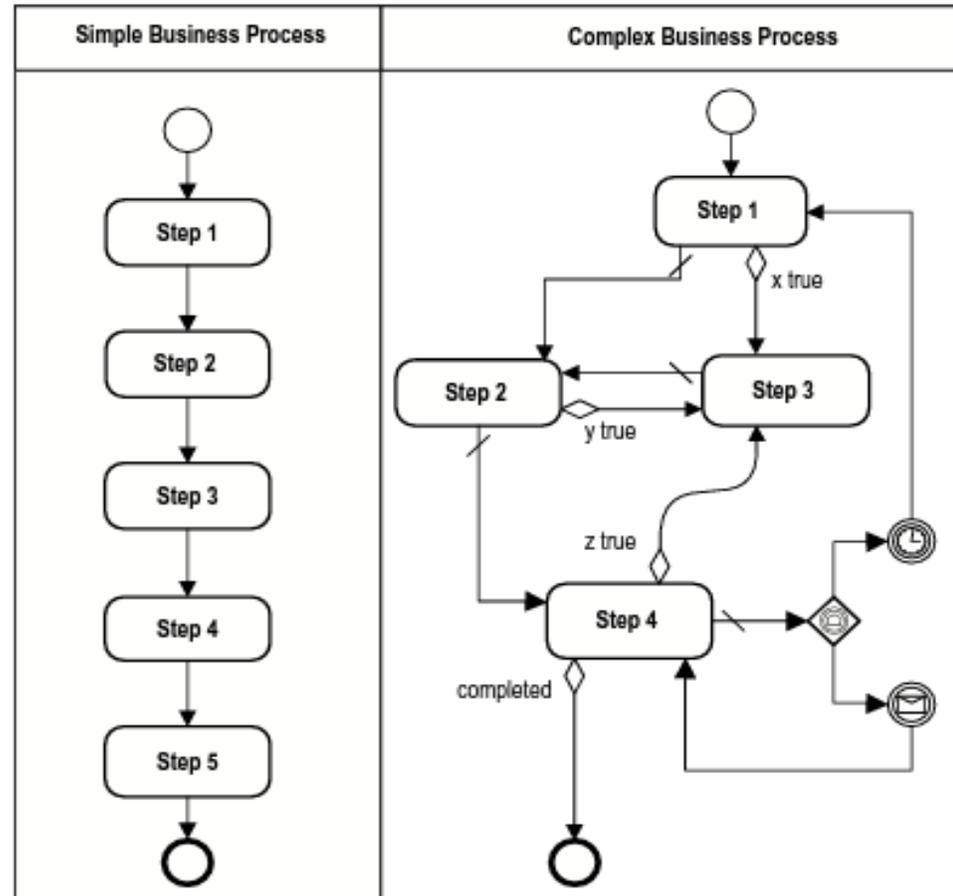
REQUIREMENTS



Business Process Modeling is the process of understanding the sequences of inter-related activities that are undertaken by a business to meet a business objective.

- Business Processes that produce products/services that participants register for;
- Processes that relate to servicing participants in the events they register for;
- Post-event processes that involve registrants and/or their information;
- Business planning processes for new events;
- Communication processes with participants;
- Reporting processes: financial reporting on events/participants, executive reporting for governments and funding partners, strategic business development processes etc.

REQUIREMENTS



REQUIREMENTS

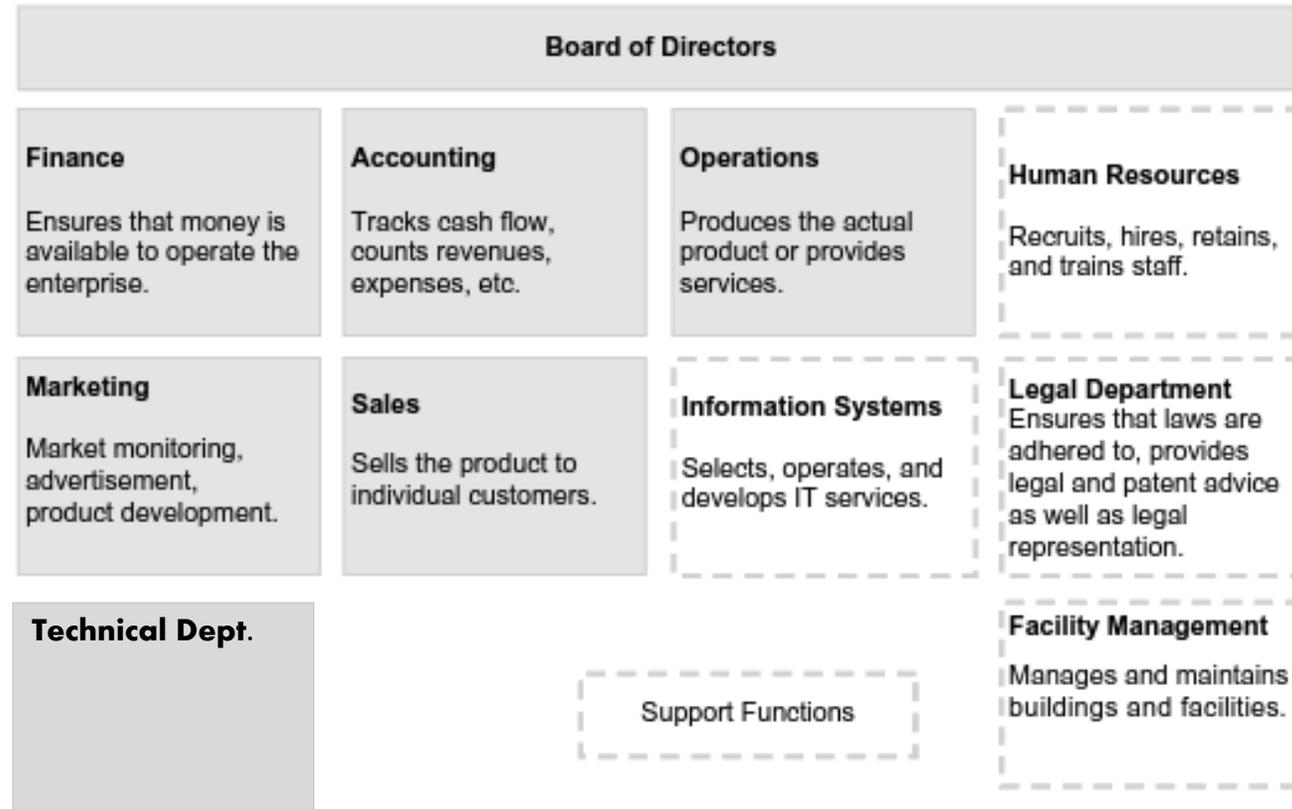


- Problem: Knowledge on business processes typically exist only implicitly within organizations
 - If a key person leaves, does the organization lose the knowledge of how to undertake the process?
- Business efficiency:
 - Since a BP is a description of how to meet an objective, we wish to ensure the BP is efficient:
 - HIGH QUALITY. LOW COST. FAST.

REQUIREMENTS



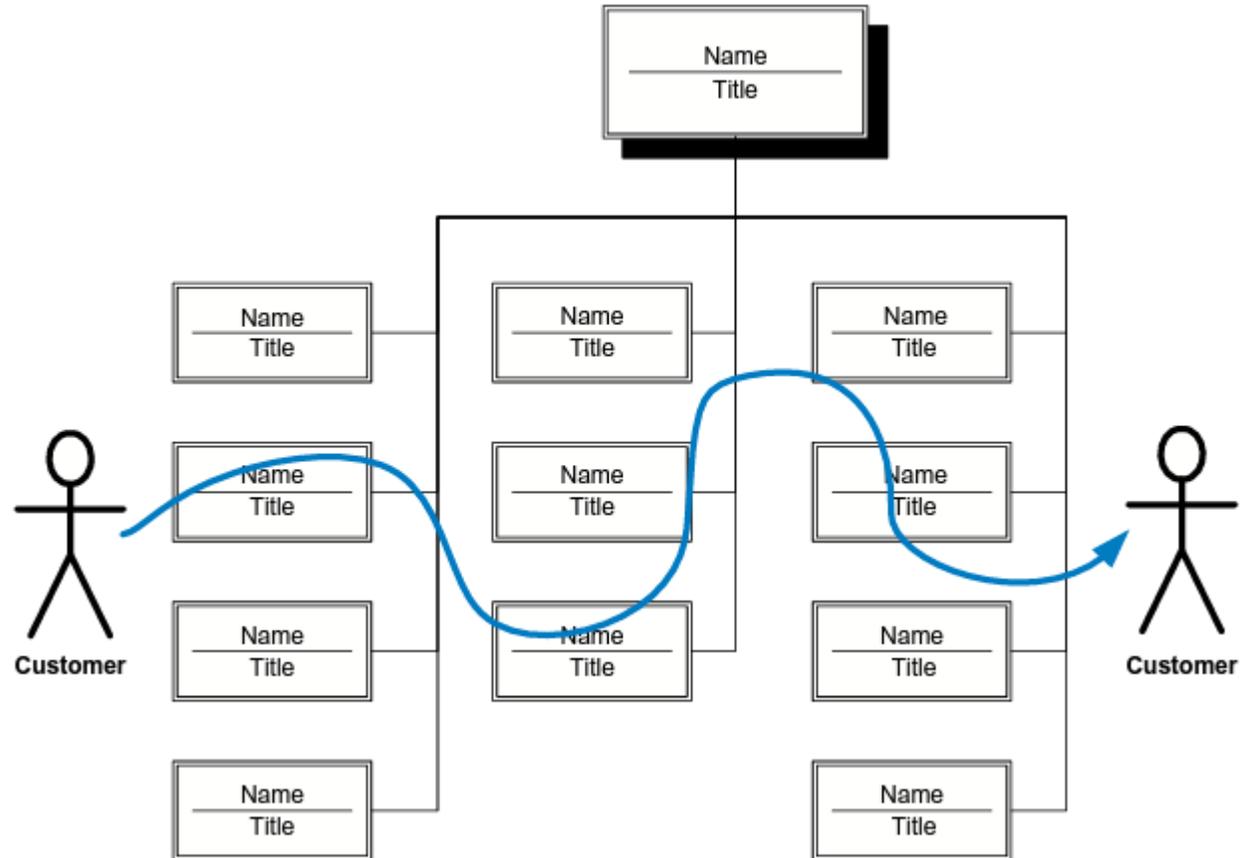
Typical Functional Organization



REQUIREMENTS



Process-Focused Organization



REQUIREMENTS



- Businesses should be predominantly process-focused rather than functionally focused
- Organization's values focus on process excellence
- Top management should think about processes and not functions
- Strategies to achieve business objectives should directly map to processes
- Organizational roles should map into process ownership
- Technology plays an important role in a process-focused organization
 - Provision of automation to improve efficiency
 - Provision of information to ensure good/fast decision-making

REQUIREMENTS



Product/Service Groups for Sport

- Competitions
 - i.e. opportunities to participate
- Athlete Development
- Coach Development
- Officials Development
- Support athletes/coaches/officials with collateral
 - Equipment, manuals, rules books, merchandise, etc.

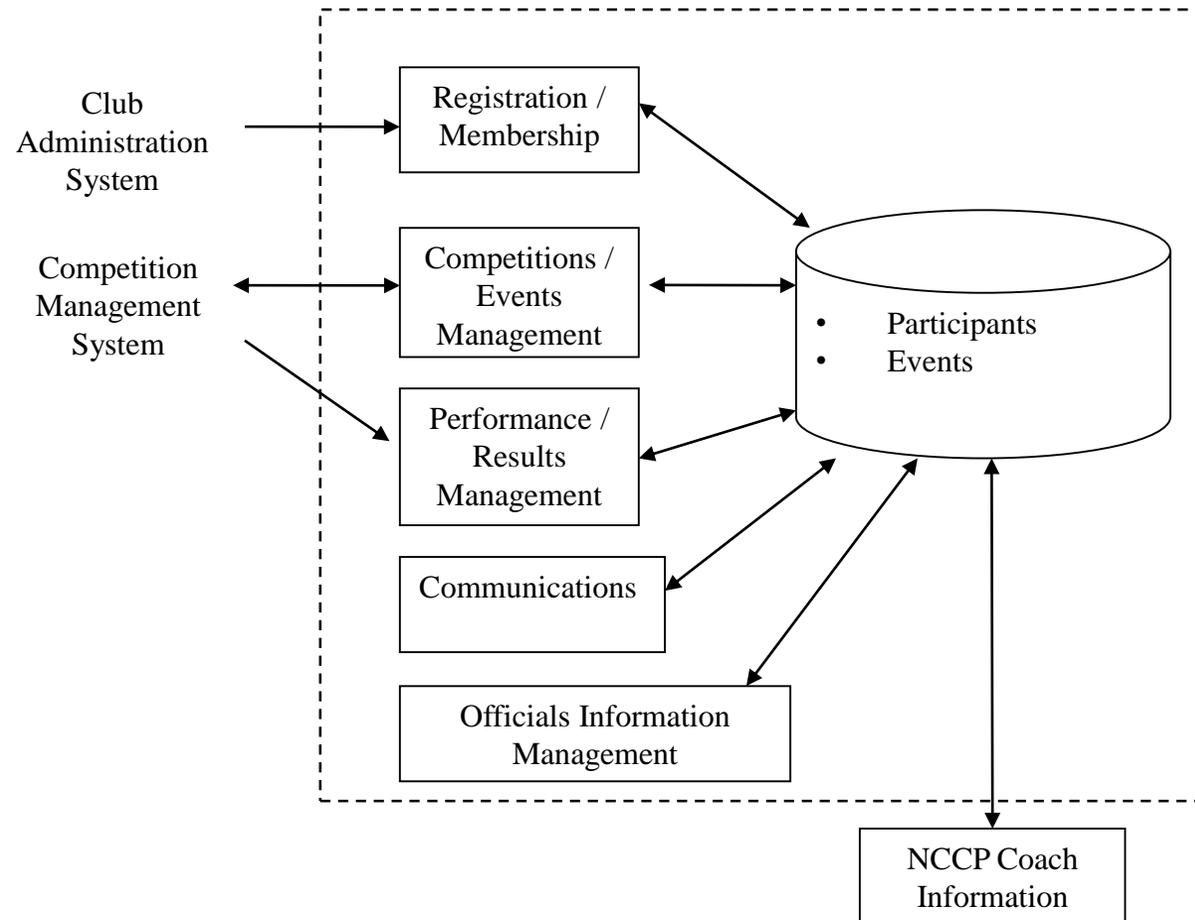
Membership is a secondary service undertaken by the customer primarily because they want to do the above?

REQUIREMENTS



- **EXERCISE:** Product/Service Inventory for a PSO.

REQUIREMENTS

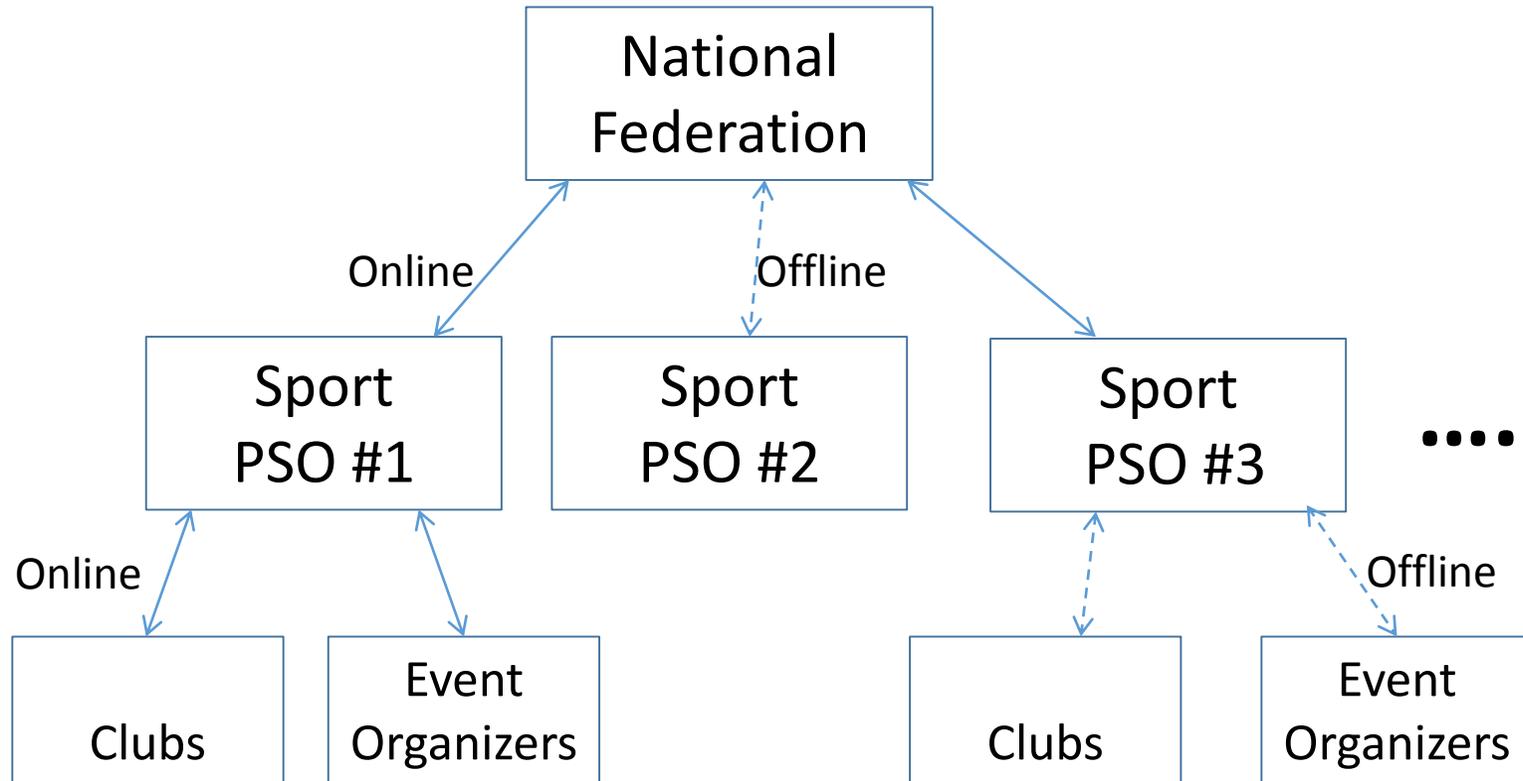


REQUIREMENTS



- Information on Participants:
 - name/address/contact info/birthdate/gender, etc
 - Membership (incl history)
 - Elite/Para-athlete attributes
 - Coaching certification, learning facilitator, etc
 - Officiating certification
 - History: events, results, club membership
 - PRC/VSS screening history
 - ***Sport-specific attributes***

REQUIREMENTS



REQUIREMENTS



- Common System Requirements
 - Register people for products/services
 - Maintain info on club/team membership, coaching level, officiating levels
 - Collect fees for membership & products/services
 - “*Know Your Customer*” ?
 - *Track athlete performance history*
 - Operate competitions/meets
 - Register teams, assign resources, schedule, results, standings
 - Handled by 3rd party systems
 - Manage Coach/Officials Certification information

REQUIREMENTS



Key features:

- Better access to data (queries, reporting, etc)
- Improved data integrity
- More info on participants
- Improved customer experience
- communication with participants
- Certificate of Insurance online
- PRC/VSS info maintained
- Records of disciplinary action
- Integration with:
 - NCCP
 - Social media

REQUIREMENTS



- **EXERCISE:** Customize the Requirements Specification for your Sport.

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PROCURING A SYSTEM



DECISION POINT:

- *I think I know what I need now... I have surveyed the marketplace and know what's out there....*
 - Stick with my current vendor and get them to modify the system to meet my needs?
 - Get a custom system developed?
 - Look for an existing product in the marketplace?

PROCURING A SYSTEM



Guidelines:

- Custom developed systems are very expensive over the long run and require considerable management attention
 - All costs are covered by you
- Existing product solutions have advantage of proven experience while costs are amortized over multiple customers
 - BEWARE: they are incented to minimize customization for you and force you to use their product as is
- There are no off-the-shelf systems that can fully meet your needs (*despite what the vendor might say...*)

PROCURING A SYSTEM



EXERCISE: Review the draft Request for Proposal (RFP)

PROCURING A SYSTEM



RFP Process:

- Assemble the RFP, Requirements Spec and the draft Contract
- Send it to the potential vendor list you have accumulated
- Create a MERX (merx.com) account and post it there.
- Create an opportunity for questions/answers
- Don't let the vendors try to communicate with anyone other than the RFP Contact Person
- Wait until RFP submission deadline...

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EVALUATION/SELECTION



Evaluation Categories:

- *Administrative Compliance*: did you submit your proposal according to instructions. PASS/FAIL
- *Responsibility*: is the Vendor company capable of doing the job (stable, experienced, financially viable). PASS/FAIL
- *Responsiveness*: does the proposed solution meet the requirements.
- *Price*: what does it cost

EVALUATION/SELECTION



- RFP Coordinator reviews submissions for compliance with proposal submission requirements
- Create a Proposal Evaluation Committee
 - They only see the Technical Proposals and score proposals against the requirements
 - They do NOT see the Price Proposals
- Create a Financial Evaluation Committee
 - Evaluate the viability/experience of the vendor companies; do reference checks
 - Review and summarize the Price Proposals
- Non-viable companies and non-compliant responses should be discarded prior to technical and price evaluation

EVALUATION/SELECTION



- Based on proposal evaluations, invite the top 2-4 proposers to do a presentation of their system/company
 - Allow ~2 hours each with 30 minutes in between for evaluators to compile notes
 - Allow for the evaluation committee to ask questions of the vendors to clarify their proposals
- Allow for the possibility to do a site visit to the vendor's offices

EVALUATION/SELECTION



Once you have selected the Preferred Vendor:

- Contract completion – the draft contract from RFP should be finalized and signed
 - BEWARE: common strategy by vendors is to swap for their “standard” one or re-negotiate once they are selected
 - Ensure that a project schedule and delivery timelines are included as part of the contract

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System Implementation



System Implementation Plan

- Software development: 2 – 4 months
- System testing: 1 month
- Data migration:
 - The process of moving participant info from your existing system to the new one. Often time-consuming and difficult.
 - initial test migration at beginning of System test period, actual data migration just before go-live.
- Stage the development and the onboarding of PSO's over time (~ 2 years?)

System Implementation



Vendor Management:

- Keep vendor (and your own people) focused on delivering on the requirements spec.
 - Vendor sometimes will try to change focus to their product or product spec (as opposed to your requirements)
- Be demanding of the vendor but be reasonable
 - Win/win attitude
 - You can't afford to kill them

System Implementation



Managing your own people:

- Your own people will start seeing new things they want that are not in the spec. (“scope creep”)
 - They have to be kept in line too!
 - Ensure formality in any change requests beyond what is in the Requirements Spec
 - PSO’s will also have their own views on what they think they need – need to ensure they are bought into the process
 - Carefully plan the onboarding process

SUMMARY



By the end of this seminar attendees will...

- ✓ Have a high level understanding of how to undertake a fair & competitive procurement for a Sport Registration System;
- ✓ Be able to tailor key documents required in this process, including:
 - Systems Requirements Specification;
 - Request for Proposal (RFP);
 - Services Agreement;
- ✓ Have a high level understanding of how to manage the system implementation process

SUMMARY



Know what you **DON'T** know...

- Managing the implementation process
 - Need to invest in project management capacity
- Landscape of systems/suppliers is changing
- Knowledge of how PSO's run their businesses
 - Opportunity for NF/PSO alignment and harmonization of business processes
- Do you know your Customers?