

# **Request for Proposal**

## ***Technology Solution Consultant***

---

**RFP Reference Number: RFQ 2025-02**

**RFP Release Date:** April 28, 2025

**Question Submission Deadline:** May 8, 2025

**Question Responses:** May 14, 2025

**RFP Closing Date:** May 27, 2025, 11:59pm EST

**Selection Notification Date:** June 16, 2025

### **1. INTRODUCTION**

#### **About ACOTRO and the SEAS Program**

The Association of Canadian Occupational Therapy Regulatory Organizations (ACOTRO) is the national organization of occupational therapy regulators in Canada. Our goal is to promote consistency and excellence in regulating occupational therapy across Canada.

As part of the mandate, ACOTRO oversees and administers the Substantial Equivalency Assessment System (SEAS) program. The SEAS program provides a single, centralized process for the assessment of educational qualifications and competencies of internationally educated occupational therapists (IEOTs). SEAS determines whether the education and competencies of IEOTs are substantially equivalent to Canadian-educated occupational therapists.

The SEAS program, initiated in 2015, is rooted in the Pan-Canadian principles of enhancing transparency, fairness, timeliness, and consistency in the foreign qualification recognition process.

More information about ACOTRO and the SEAS program can be found here:  
<https://acotro-acore.org/seas/>

#### **About the SEAS Improvement Project**

ACOTRO is now embarking on an initiative to improve, streamline, and strengthen the SEAS program, with the goal of reducing timelines to assess the substantial equivalency of IEOTs. The improvements will ensure that ACOTRO can continue to

manage the increasing volume of IEOTs seeking registration in Canada and will expediate the processes so that IEOTs can enter the Canadian healthcare workforce faster.

One of the main requirements of this initiative involves sourcing and implementing a credentialing / candidate management system and data management and reporting solution to better and more efficiently process and track IEOT SEAS applications. As ACOTRO is a small, not-for-profit organization, the current SEAS process includes the manual administration of tasks including processing of application forms and exam results, as well as manually entering and tracking various types of data with excel spreadsheets (i.e., fees paid, dates, contact information, exam results, education credentials), and manual invoicing for IEOT fees. ACOTRO is looking for a solution with flexible and automated workflows that are scalable to future needs and integrate with other ACOTRO processes and systems currently used such as QuickBooks. The current manual system is not well integrated with third-party proctoring organizations and exam and learning hosts.

Sourcing and implementation of a credentialing / candidate management system and data management solution for the SEAS program is planned to be done in the following two phases:

**Phase 1** (the focus of this RFP) – Source credential / candidate management system and data management solution. Implement the IEOT automated application module with applicant messaging.

*This phase will start in July 2025 and is to be completed by March 2026.*

Activities in phase 1 would include:

#### Assess

- Define objectives of credential/candidate management system and data management solution
- Conduct needs and gap assessment and identify challenges and strengths
- Determine system requirements

*Note that the 'current state process' of the steps and tools used in the SEAS program will be available to the successful vendor.*

#### Source Solutions

- Review of credentialing / candidate management systems, data management options, and develop a list of system options, including how each option would provide the determined system requirements, as well as costs, maintenance, and other considerations for each.
- Identify shortlist of vendor options.

- Coordinate detailed product demonstrations and question and answer sessions with the shortlisted vendor options.
- Work with ACOTRO to determine / select the preferred vendor option, including attending meetings of the SEAS project team and the SEAS Oversight Committee (a committee representing provincial occupational therapy regulator executives).
- Work with ACOTRO to procure the selected credentialing / candidate management system and data management solution.
- Source solutions to automate other administrative functions.

*Although this phase will implement the IEOT application process with messaging, all system requirements with data management solution etc. (as outlined in phase 2 below) need to be planned for and considered in sourcing the solution in this phase.*

### Implement

- Develop and confirm plan to implement phase 1 part of solution.
- Support ACOTRO to implement the initial elements of the credentialing / candidate management system (the IEOT application process with applicant messaging).
- Create training plan and materials, including communication materials for ACOTRO staff, support ACOTRO in delivery of training.
- Develop final phase 1 report, including all steps in process, recommendations and decisions, and implementation plans.

**Phase 2** (included in this RFP as an FYI) will be conducted through a separate competitive bidding process (i.e., RFP) separate from / after this RFP and is expected to include:

- Onboard the remaining system modules and functions
- Support the integration of the solution with third party proctoring organizations, exam and learning hosts, and currently used systems
- Automation of other administrative functions
- Create/onboard the data management solution
- Update the SEAS current state process

*It is expected that additional elements would integrate any additional database requirements not covered in phase 1, including administration of exams, exam proctoring, tracking of and communicating exam results with ACOTRO and applicant, tracking and communicating financial data (e.g., applicant invoicing), the selected system connecting with QuickBooks for accounting purposes.*

- Complete training on new elements, including development of training and communication materials
- Importing of historical SEAS / IEOT applicant data, as required
- Develop final phase 2 report

- *Phase 2 is expected to start in early 2026 and be completed by March 2028.*

**\*\*The vendor selected for this RFP** would be responsible for the activities in **Phase 1** above and would have the opportunity to bid on the work outlined for Phase 2 above.

The budget for Phase 2 is to be confirmed based on the outcomes from Phase 1, but is expected to be approximately \$90,000 CAD.

## 2. REQUIREMENTS OF VENDOR

ACOTRO is requesting proposals from vendors to provide the phase 1 activities above, including the needs assessment, sourcing, selection of the credentialing / candidate management system and data management solution, and implementation of the IEOT application process with applicant messaging.

## 3. VENDOR EXPERTISE

The vendor should have the following knowledge and expertise:

- Knowledge of professional credentialling, including healthcare credentialling and/or healthcare regulation and licensure.
- Experience working with small, not-for-profit Canadian organizations, including the challenges and opportunities these organizations may encounter.
- Knowledge of and experience procuring and implementing IT and digital strategies/software solutions to help not-for-profits achieve their business operations and streamline processes.
- Assessing and determining needs and system requirements.
- Ability to propose simple, yet effective solutions based on ACOTRO's needs (coming up with creative options to support need).
- Communicating and engaging with staff and committees (written and verbal) to support decision-making.

## 4. PROPOSAL SPECIFICATIONS

Your proposal should include the following information:

- Your knowledge / expertise per the requirements outlined above, as well as:
  - o Engagements you are working on and/or have completed in the not-for-profit or regulatory sectors and how these engagements compare to the requirements in this RFQ
  - o Your resume(s), highlighting your applicable qualifications
  - o If you are responding on behalf of a consulting firm, please include a brief description of the firm, including clients, staff size, and industries served;

also clarify the team members that would be working on this project, including their specific expertise and knowledge, and attach resumes

- Your website
- Identify how you/the consulting firm adheres to The Personal Information Protection and Electronic Documents Act (PIPEDA)
- Your proposed approach, based on the requirements outlined above, including the specific steps you would take to address the requirements. Include how you would communicate and collaborate with ACOTRO throughout the process. If you are responding on behalf of a firm, indicate the roles each of the team members would have on each activity.
- Implementation plan or roadmap to achieve project objectives, including change management strategies.
- Approach to training plan, including development of materials for all users.
- Identify any risks to successful completion of the project and propose mitigation strategies.
- Briefly describe how the services you offer and/or approach you use would be of added value to augment the requirements of this RFP.
- References - supply three client references for your company or lead consultant, including the name and address of the reference and the name, title, phone number and email address of the contact person.

## 5. PRICE QUOTE

Provide fees for the requirements as outlined above. *Fees are not to exceed \$26,000 CAD, plus tax.*

## 6. SUBMISSION

A complete electronic version of your proposal (Microsoft Word or PDF) noting the RFQ Reference # can be emailed to:

**Association of Canadian Occupational Therapy Regulatory Organizations (ACOTRO)**

**Attention: Jill Kovacs, [jkovacs\\_conf@coto.org](mailto:jkovacs_conf@coto.org)**

**Closing date and time:** Tuesday May 27, 2025, 11:59 p.m. EST. Proposals received after the closing date and time may not be considered.

## **7. INQUIRIES**

Inquiries, interpretations, and questions regarding this RFQ are to be directed to Jill Kovacs, in writing, at [jkovacs\\_conf@coto.org](mailto:jkovacs_conf@coto.org).

E-mailed questions may be received up to Thursday May 8, 2025, 11:59pm EST. Written answers to all questions received will be sent to all potential vendors who submitted questions. The answers will be emailed to potential vendors by Wednesday May 14, 2025.

## **8. RFQ PROCESS**

Proposals must be received via email sent to [jkovacs\\_conf@coto.org](mailto:jkovacs_conf@coto.org) by 11:59pm EST Tuesday May 27, 2025.

Upon closing, ACOTRO will review all proposals for completeness. Only complete proposals will be reviewed for further consideration.

Eligible proposals will be evaluated based on the elements in section 4 and 5 above, including financial competitiveness.

## **9. PERIOD OF AGREEMENT**

The term of any contractual agreement will be from the date of award up to March 2026.

## **10. SELECTION PROCESS AND CRITERIA**

Selection will be based on the consultants / consulting firm's qualifications (knowledge and expertise); related work experience and depth of experience; overall strength of proposal; and proposed remuneration.

The consultant / consulting firm may be required to participate in an interview prior to awarding the contract. ACOTRO reserves the right to reject any or all proposals and to accept the proposal deemed most favourable to the interests of ACOTRO.

- Expertise and experience, and qualifications that align with project requirements
- Completion of similar projects
- Related past successes that demonstrate reliability and capability
- Experience with implementation and post-implementation support
- Awareness of security and regulatory requirements
- The proposed approach, including implementation and training plan
- The proposal demonstrates an understanding of ACOTRO's values and goals, project outcomes
- Proposed remuneration

## **11. CONTRACT NEGOTIATION**

ACOTRO will negotiate a contractual agreement with the preferred consulting firm. If ACOTRO is unable to negotiate an acceptable contractual agreement, then the second preferred consulting firm may be selected, and a contractual agreement developed. The ACOTRO Executive, at any time and without liability, may withdraw from negotiations with any potential consulting firm.

## **12. TERMS AND CONDITIONS**

ACOTRO will not be responsible for any costs incurred by a consulting firm in preparing and submitting proposals and/or attending interviews. ACOTRO accepts no liability of any kind prior to the signing of a contract.

Submission of a proposal will not obligate, nor should it be construed as obligating ACOTRO to accept any such proposal or to proceed further with the project. ACOTRO may, in their sole discretion, elect not to proceed with the project, and may elect not to accept any or all proposals for any reason.

At all times, the consulting firm has the responsibility to notify ACOTRO, in writing, of any ambiguity, divergence, error, omission, oversight or contradiction contained within the proposal as it is discovered.

Consulting firms may amend or withdraw their proposals prior to the closing date and time specified in the RFQ by way of written or faxed notice to Jill Kovacs at [jkovacs\\_conf@coto.org](mailto:jkovacs_conf@coto.org).

After the closing date and time, proposals submitted are final and may not be altered by subsequent offerings, discussions, or commitments unless the consulting firm is requested to do so by ACOTRO.

The consulting firm must identify any information in its proposal that it considers to be confidential or proprietary.

All proposals and accompanying documentation received under this competition will become the property of ACOTRO and will not be returned.

ACOTRO has reserved the right to waive minor non-compliance by a consultant / consulting firm with the requirements of the RFP. This will allow ACOTRO to consider and possibly accept any proposal which is advantageous even though the proposal may be non-compliant in some minor respect.

ACOTRO reserves the right to accept or reject, in whole or in part, any or all proposals.

ACOTRO reserves the right to cancel and/or re-issue this RFP at any time for any reason without penalty.

The consulting firm's proposal may form part of the contractual agreement by attachment and will be incorporated by reference. Claims made in the proposal may constitute contractual warranties. Any provision in the proposal may be included in the contractual agreement as direct provision thereof.

The successful vendor agrees to obtain and maintain all professional certifications and licenses necessary to lawfully provide the services required under this request for proposals.