

May 26, 2026

Re: Invitation to Submit a Proposal — HTCC Administrative & Management Services

On behalf of the Hand Therapy Certification Commission (HTCC), I am pleased to invite qualified organizations to submit proposals in response to the enclosed Request for Proposal (RFP) for Administrative and Management Services. This Request for Proposal (RFP) outlines our organizational needs and the criteria for a strategic administrative partnership.

HTCC is the independent credentialing body responsible for the Certified Hand Therapist (CHT) program, setting and maintaining eligibility, examination, and recertification standards for hand therapy professionals in the United States and internationally. After many years of operating under a lean, contracted management model, the Commission is now evaluating its administrative structure to support the next phase of the organization's growth, modernization, and certificant engagement. The enclosed RFP is the formal vehicle for that evaluation.

We welcome responses from a range of provider types — independent Executive Directors, boutique management firms, full-service Association Management Companies, and hybrid arrangements with specialized partners. Proposers are encouraged, though not required, to submit more than one service-model option so the Commission can compare approaches. The RFP describes our strategic priorities, scope of services, technology environment, and evaluation criteria in detail; marketing and growth support is identified as an area of particular importance and will weigh meaningfully in the evaluation.

Key dates are summarized below; the complete timeline appears in Section 13 of the RFP. Written questions are due by June 5, 2026, with HTCC's consolidated responses distributed to all known proposers by June 10, 2026. Proposals are due no later than June 19, 2026. Finalist interviews are anticipated July 20 – 31, 2026, with final selection by February 2027, a transition period during 2027, and full operational implementation by early 2028.

Proposals should be submitted electronically to Martin Walsh, HTCC Executive Director at mwalsh@htcc.org, with the subject line "HTCC RFP — [Proposer Name]." Format and content requirements, including the 25-page limit (excluding résumés, references, and the pricing appendix) and required disclosures, are set out in Section 11.

All questions and communications regarding this RFP must be directed exclusively to Martin Walsh. To preserve fairness across proposers, please do not contact other HTCC Board members, staff, or vendors regarding this solicitation. HTCC will distribute Q&A responses to all known proposers so that every firm works from the same information.

All proposals will be treated as confidential business information by HTCC and its evaluators. If your response contains material you consider proprietary, please mark those portions accordingly. Additional confidential background — including audited financials, the current organizational chart and vendor list, certificant and candidate volume statistics, technology documentation, and the current marketing plan and KPI dashboard — is available upon execution of a mutual non-disclosure agreement, as described in Appendix A.

We recognize the time and effort a thoughtful response requires, and we appreciate your consideration. HTCC has a strong track record, a committed Board of Directors, and a clear ambition for its next chapter; we are looking for a partner who can match that ambition with operational rigor. We very much look forward to reviewing your proposal.

Please do not hesitate to reach out with any questions.

Sincerely,

A handwritten signature in black ink, appearing to read "Martin Walsh". The signature is fluid and cursive, with the first name "Martin" and last name "Walsh" clearly distinguishable.

Martin Walsh

Executive Director
Hand Therapy Certification Commission
mwalsh@htcc.org | 916-566-1140

Enclosure: Request for Proposal — Administrative & Management Services



Request for Proposal (RFP)

Administrative & Management Services

Issued by	Hand Therapy Certification Commission (HTCC)
RFP issue date	May 26, 2026
Proposals due	June 19, 2026
Final selection	By February 2027
Full implementation	Early 2028
RFP contact	Martin Walsh - mwalsh@htcc.org - 916-566-1140

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1. About HTCC

The Hand Therapy Certification Commission (HTCC) is an independent credentialing body responsible for the Certified Hand Therapist (CHT) certification program. HTCC sets and maintains eligibility, examination, and recertification standards for hand therapy professionals in the United States and internationally.

Organization at a glance

Active certificants	7,851
Annual exam candidates	~625
Annual operating budget	~\$1,000,000
Board size and composition	16 board members, consisting of 14 CHTs, one public member and one physician member
State of incorporation / governing law	Indiana

Current operating model

HTCC currently operates under a contracted management model that includes:

- An Executive Director (CHT) and administrative support delivered through a single-member LLC management company
- An internal Examination Services Director (CHT) responsible for the item bank and exam development. This role will be retained to work alongside the contracted testing vendor who oversees exam development, delivery, and psychometric analysis.
- External vendors providing marketing, information technology (including a custom certificant database), accounting, and legal.

This model has historically emphasized lean staffing, continuity of institutional knowledge, and field-specific leadership. HTCC is now evaluating its administrative model to support modernization and growth in the next phase of the organization's life cycle.

2. Purpose of this RFP

HTCC is soliciting proposals from qualified providers to deliver administrative and management services beginning with a transition period in 2027 and full implementation by early 2028.

HTCC welcomes proposals from a range of provider types, including:

- An independent Executive Director or small management firm
- A full-service Association Management Company (AMC)
- A hybrid arrangement combining the above with specialized service providers

The selected partner will be expected to:

- Deliver day-to-day operational excellence

- Drive strategic growth in the certification pipeline and certificant engagement
- Provide scalable infrastructure to support HTCC's future
- Preserve the institutional knowledge and quality that have defined HTCC

3. Strategic Priorities

Proposals should describe how the proposer's model would advance the following priorities.

A. Growth and market position

- Increase the certification candidate pipeline
- Improve recertification retention
- Strengthen HTCC's visibility and relevance within the hand therapy profession and adjacent disciplines

B. Operational efficiency

- Streamline administrative workflows and turnaround times
- Improve use of technology and data systems
- Reduce redundancy across vendors

C. Technology evolution

- Develop a clear plan for the existing custom certificant database alongside the emerging Salesforce-based CRM
- Improve reporting, analytics, and the certificant and candidate experience

D. Financial stewardship

- Deliver value-aligned pricing while maintaining cost discipline
- Support long-term financial sustainability, including responsible use of marketing investment

4. Scope of Services

Proposals should respond to each scope area below.

4.1 Executive leadership

- Serve as Executive Director or equivalent senior leader for HTCC
- Partner with the Board on strategic planning, annual goal-setting, and execution
- Serve as the public face of HTCC, effectively representing the organization to certificants, candidates, partner organizations, accreditors, and the broader profession to advance its mission and standing.

A CHT credential for the Executive Director is not required but may be considered an advantage. Proposers without a CHT in this role should describe how they will build and access clinical subject-matter expertise.

4.2 Operations and administration

- Certification and recertification application processing
- Customer service for certificants and candidates (phone, email, ticketing)
- General office operations and stakeholder communications
- Document and records management consistent with applicable retention requirements

4.3 Financial management

- Annual budget development and ongoing monitoring
- Financial reporting to the Board and Finance/Audit committee(s)
- Coordination with the accounting firm or, if proposed, in-house financial services
- Treasury, A/R, A/P, and payroll administration

4.4 Governance support

- Board and committee meeting scheduling, logistics, and coordination
- Agenda development, meeting materials, minutes, and action tracking
- Compliance, recordkeeping, and policy administration

4.5 Exam and certification support (defined scope)

HTCC intends to retain the following:

- PSI as examination administration vendor
- Existing testing and psychometric support
- The internal Examination Services Director (CHT)

The selected provider will:

- Coordinate with these parties on logistics, communications, and scheduling
- Support candidate-facing communications, eligibility verification, and post-exam workflows
- Not replace core examination development or psychometric functions

4.6 Vendor management

Proposals should address:

- The proposer's approach to managing existing vendors versus consolidating services
- Demonstrated experience managing IT and database systems, marketing vendors, and certification-related infrastructure
- Conflict-of-interest policies and disclosures, particularly where the proposer offers in-house alternatives to current HTCC vendors

4.7 Marketing and growth support (priority area)

Marketing and growth are areas of particular importance to HTCC and will weigh heavily in the evaluation. Proposals should include:

- The proposer's approach to supporting or enhancing HTCC's marketing efforts

- Whether the proposer recommends integration with the current marketing firm, replacement, or in-house capability — with reasoning
- Demonstrated experience driving growth for certification or credentialing organizations, including specific outcomes (e.g., candidate pipeline growth, recertification retention improvements, brand reach)
- Suggested KPIs and how they would be measured and reported to the Board

5. Service Model Options

Proposers are encouraged — but not required — to submit more than one option so that HTCC can compare models. Suggested options:

Option A — Lean model

A structure similar to the current arrangement: a dedicated Executive Director with administrative support and minimal additional services.

Option B — Hybrid model

Core leadership combined with expanded infrastructure, such as embedded technology, analytics, or marketing integration.

Option C — Full-service / AMC model

An integrated AMC-style solution that consolidates multiple vendor functions under a single provider.

For each option submitted, the proposer should provide pricing, staffing, and tradeoffs.

6. Staffing Model

For each option proposed, please provide:

- A detailed staffing structure with named or to-be-hired roles
- Roles, responsibilities, and time allocation (FTE %) by role
- Qualifications, certifications, and relevant experience of key personnel, with résumés in an appendix
- Backup and continuity plans (turnover, leave, succession)

Important considerations

- HTCC strongly values continuity of institutional knowledge.
- Administrative Personnel Continuity: Proposals must explicitly address the recommended path for the current HTCC Administrative Manager Lisa Kahn, who brings over 10 years of vital institutional knowledge to the organization. Bidders may propose either the retention of this individual within their staffing model or a structured transition strategy. Proposers will not be evaluated negatively for choosing either approach, provided a clear operational rationale is justified in the response.

7. Technology and Systems Approach

Proposals should address:

- The proposer’s recommended strategy for the existing custom certificant database and the Salesforce-based CRM currently in development
- Data integration approach, including migration, validation, and ongoing synchronization
- Reporting, dashboards, and self-service analytics for the Board and staff
- Modernization roadmap and associated risks and dependencies
- Data security, privacy, and incident response standards (please describe relevant certifications, e.g., SOC 2)

8. Transition Plan

Proposals must include a detailed transition plan aligned with the following anticipated timeline:

- Vendor selection: by February 2027
- Transition period: throughout 2027, with potential overlap with the current management provider and gradual assumption of responsibilities
- Full operational transition: by early 2028

The transition plan should address:

- Knowledge transfer and documentation
- Risk identification and mitigation
- Continuity of certificant and candidate services
- Staffing continuity, including any retention of current personnel
- Cost considerations during the overlap period (e.g., shared or transitional pricing)

9. Pricing Structure

Provide a transparent pricing structure for each model proposed. At minimum, include:

- Annual cost by service model, in U.S. dollars
- Year 1 (transition), Year 2, and Year 3 pricing
- A clear breakdown of services included in the base fee
- Optional or add-on services and their pricing
- Pass-through costs (e.g., travel, software licenses, postage)
- Annual escalators or rate-review provisions

HTCC’s pricing posture

- HTCC is open to higher investment for demonstrated value.
- HTCC is cost-sensitive given current strategic use of reserves and ongoing marketing investment.
- Pricing alone will not determine selection; value, capability, and fit will be weighed jointly.

10. Required Qualifications and Experience

Each proposer must demonstrate:

- Relevant experience supporting certification or credentialing organizations
- Healthcare, allied-health, or therapy-related experience (preferred)
- Experience working with volunteer boards and member-led organizations
- A minimum of three (3) client references for similar engagements, including contact information and engagement scope/duration

11. Proposal Submission Requirements

Format

- PDF or Microsoft Word, single-spaced, 11-point or larger font
- Maximum [25] pages excluding résumés, references, and the pricing appendix
- Cover letter signed by an authorized representative

Required components

- Cover letter and executive summary
- Organizational overview and qualifications
- Response to each Scope of Services area (Section 4)
- Service model option(s) (Section 5)
- Staffing model and key personnel (Section 6)
- Technology and systems approach (Section 7)
- Transition plan (Section 8)
- Pricing (Section 9)
- References (Section 10)
- Required disclosures: conflicts of interest, pending litigation, ownership and material affiliations, and insurance coverage

Submission

- Submit electronically to: Martin Walsh, Executive Director, mwalsh@htcc.org
- Subject line: "HTCC RFP — [Proposer Name]"
- Late submissions may not be considered.

Confidentiality

- All proposals will be treated as confidential business information by HTCC and its evaluators.
- Proposers should mark any portions they consider proprietary.

12. Evaluation Criteria and Process

Proposals will be evaluated using the following weighted criteria:

Criterion	Weight
Strategic capability (growth and modernization)	25%
Operational strength	20%
Technology approach	15%
Staffing model and continuity	15%
Cost / value alignment	15%
Transition feasibility	10%
Total	100%

Evaluation process

- Initial screening for completeness and minimum qualifications
- Scoring against weighted criteria by a Board-led selection committee
- Finalist interviews and reference checks
- Best-and-final-offer (BAFO) round, if needed
- Final selection by the Board

13. Timeline

Milestone	Date
RFP issued	May 26, 2026
Written questions due	June 5, 2026
HTCC responses to all questions distributed	June 10, 2026
Proposals due	June 19, 2026
Finalist interviews	July 20 – 31, 2026
Reference Checks & Vendor Due Diligence	September/October 2026
Final selection	By February 2027

Milestone	Date
Transition period	2027
Full implementation	Early 2028

14. Terms and Conditions

- Issuance of this RFP does not obligate HTCC to award a contract.
- HTCC reserves the right to reject any or all proposals, to negotiate with one or more proposers, and to modify or cancel the RFP at any time.
- All costs incurred by proposers in responding to this RFP are the proposer’s responsibility.
- The selected proposer will be required to enter into a written agreement with HTCC, including provisions for confidentiality, data protection, indemnification, insurance, and termination.
- HTCC may share proposals with members of the Board, the selection committee, and outside advisors bound by appropriate confidentiality obligations.

15. RFP Contact and Communications

All questions and communications regarding this RFP must be directed to:

- Martin Walsh, HTCC Executive Director
- mwalsh@htcc.org
- 916-566-1140

To preserve fairness, proposers should not contact other HTCC Board members, staff, or vendors regarding this RFP. HTCC will distribute Q&A responses to all known proposers.

Appendix A — Information Available Upon Request

Upon receipt of a signed mutual non-disclosure agreement, HTCC will share:

- Most recent audited financial statements
- Current organizational chart and vendor list
- Sample Board materials (anonymized)
- Certificant and candidate volume statistics and historical trends
- Existing technology and database documentation
- Current marketing plan and KPI dashboard