College of Physiotherapists of Ontario

Request for Proposal: Quality Assurance Program Software Support Tools

Date Issued:	July 6, 2018
Deadline for Questions:	July 13, 2018
Submissions Due:	July 27, 2018, 4pm EST

Closing location
Email: mlopezgarcia@collegept.org

Contents

COLLEGE OF PHYSIOTHERAPISTS of ONTARIO

Background and Description of the Project

The College of Physiotherapists of Ontario (College) is inviting submissions for proposals to supply and implement a software solution to support our Quality Assurance (QA) program.

Submissions must be received by **July 27, 2018**.

Overview of the College's Mandate

The College exists to ensure the protection of the public. The College carries out its mandate by registering only qualified individuals, ensuring that physiotherapists maintain competency throughout their careers, addressing concerns about physiotherapists and developing and documenting standards of the profession for the profession.

A regulation under the Physiotherapy Act describes the requirements of the Quality Assurance program to ensure physiotherapists maintain competency. There are five components to the program: self-assessments, continuing education or professional development, peer and practice assessments, collection, analysis, and dissemination of information and a mechanism for the College to monitor physiotherapists' participation and compliance with the program.

The focus of this request for proposal relates to the requirement for peer and practice assessments, collection, analysis, and dissemination of information and monitoring physiotherapist's participation in this part of the program.

Background to the Project

The College is making changes to the Quality Assurance Program. The new program will include the following components:

- Continuing education and professional development activities
- Annual completion of a mandatory online learning activity created by the College
- A 1-hour remote assessment completed with a peer assessor using video conferencing (20% of members each year)
- A more in-depth on-site practice assessment conducted by a peer assessor at the physiotherapist's practice site (a subset of the 20% who did the remote assessment)
- Participation in an individualized practice improvement program for those with gaps identified through the on-site practice assessment

A more detailed description of the College's new Quality Assurance Program is attached in the appendix. There is also a short video available: https://www.collegept.org/video-overview-of-new-quality-assurance-program.

The project is expected to take place from August 20, 2018 to mid-October 2018.

Required Products and Services

The College is seeking a technology tool that will streamline the practice assessment process, the collection of assessment data and submission of that data to the College by assessors.

Each year, about 20% of physiotherapists will be selected to undergo a practice assessment.

Each selected physiotherapist will be asked to complete a questionnaire that will confirm and collect information about their practice profile. This information will assist the College with matching the physiotherapist with an appropriate assessor, and to select practice-relevant questions for the remote and on-site assessments.

After the physiotherapist is matched with a peer assessor, they will both confirm that they have no conflict of interest. The physiotherapist will use a self-service scheduling tool to schedule a time for the remote assessment based on the availability of the matched assessor.

The remote assessment is a 1-hour interview to be conducted using videoconferencing. The interview will consist of a series of behaviour-based questions. The assessor will use the tool to score the physiotherapist's answers, and to record additional comments. The tool will then transmit the data to the College once the assessment is complete.

The data entered by the assessor will be used to score the remote assessment. Physiotherapists who failed to meet certain critical criteria, or whose cumulative score is below a pre-determined cut score, will be directed to do an on-site assessment.

Physiotherapists who are required to do an on-site assessment will be matched with another peer assessor. They will both confirm that they have no conflict of interest. The physiotherapist will use a self-service scheduling tool to schedule a time for the on-site assessment based on the availability of the matched assessor.

The on-site assessment will take place at the physiotherapist's place of practice. The assessment will take up to 4-hours to complete. The assessment consists of a review of the physiotherapist's patient records, and a behaviour-based interview. The assessor will use the tool to score the physiotherapist's answers, and to record additional comments. The tool will then transmit the data to the College once the assessment is complete.

The data entered by the assessor will be used to score the on-site assessment. Physiotherapists who fall below a pre-determined cut score will be referred to the Quality Assurance Committee for review.

The remote and on-site assessments will consist of a set of core questions (all physiotherapists will be asked those questions), and a set of practice-relevant questions (selected based on the physiotherapist's practice profile). The questions will be developed and then inputted into the tool to form a question bank.

Each question will include a question script, a series of suggested probing questions, and scoring cues.

The tool will draw from the question bank to compile the questions for each individual physiotherapist being assessed based on the practice profile question provided in the practice questionnaire.

Expected Deliverables

The vendor will need to consider the delivery of a complete set of products and services including:

- Integrated software application or solution for assessment and scheduling tool
- Professional services including project management and training
- Implementation services including configuration, customization, integration and system support

Requirements for the functionality of the solution are documented within the business and technical requirements contained within **Schedule I**.

Integrated Software Application or Solution

The College is seeking a solution that will meet its requirements as laid out in this RFP document. Broadly speaking, the Proponent's proposed solution should address the following functional areas at a minimum, however, we expect Proponents to architect a solution that economically satisfies the requirements described in **Schedule I**.

Major solution functionality:

- Online and responsive on mobile devices
- Integration with existing system (Microsoft Dynamics 365 customized solution)
- Administration and ease of use
- Reporting and Data Analytics

It is the College preference to leverage the Proponents existing technology solution, minimizing the customization that will be required to meet our requirements.

PHIPA and PIPEDA Compliance

The College has a defined policy toward privacy of personal information and meeting its commitment it PIPEDA. Proponents should confirm that their system meet the requirements of these privacy policies.

Cloud Solution

The College prefers that the selected solution be cloud-based. As such, Proponents should indicate whether the proposed solution will be hosted off-site on the Proponents premises. The Proponents off-site location must be located in Canada and abide by Canadian privacy and security regulations. For off-site hosting, the design of the infrastructure should be based on the information contained within this RFP along with the Proponent's knowledge of its product and solution.

Professional Services

As highlighted, the College is seeking a solution partner who can support all of the Colleges needs in order to support the QA process. Prime is the ability of the vendor to provide professional service to deliver the design and execution of the assessment tool. These services should include:

- **Project Management:** to deliver a project of this nature will require detailed planning and monitoring. Project management services will be critical to the successful execution of the project. Services should include the required activities to manage scope, schedule, budget and risk, with the associated reporting. The project management services should also address the required project governance.

- **Training:** Services should include delivery of training and documentation for end users as well as software administration

Implementation Services

The vendor shall propose a comprehensive range of implementation services that can deliver the systems, including:

- **Configuration**: Ensuring that all components function as needed by the College.

- **Customization**: Some adaptation of the software is very likely, however, we wish to minimize customization. Customization refers to changing the way the software works to better meet the needs of the College.

- **Integration**: This includes integration of the software provided by the Vendor with the College's CRM system (Microsoft Dynamics 365 customized solution). The preferred method of integration is that it should follow industry leading practices (such as exposed web services or messaging). In addition, all of the data to be collected by the system solution to be provided by Vendor must be reasonably capable of being accessed by any future applications to be procured by the College.

- **Documentation**: Common system documentation is required that fully describes the implemented solution and will allow the College to operate the system independently. Documentation should include, but not be limited to, operational, support, systems and architecture documents.

- **System Support**: Following implementation of the selected solution, the College will require ongoing support to help ensure the solution runs effectively and is maintained. The proposal should describe the support services offered.

RFP Process

The College is undertaking a structured procurement process that is described in this section of the RFP.

Timetable

The RFP process timetable is as follows:

Event	Date
RFP Issue Date	July 6, 2018
Intent to Respond Deadline	July 13, 2018
Deadline for Proponent Questions	July 13, 2018
Answers to Questions Distributed	July 20, 2018
Proposal Submission Deadline	July 27, 2018
Proponent Shortlist Notified	August 1, 2018
Proponent Presentations and Demos	August 2 – 10, 2018
Selected Proponent Notified	August 17, 2018

The College intends to adhere to this timetable but realizes that delays may occur. The College reserves the right to amend any of the dates set forth above. The Proponent must be able to accommodate changes to the schedule.

The College is inviting a small number of vendors to respond to this RFP. We anticipate inviting many, but not all proponents to demonstrate their solution. We understand that staff availability is always difficult and strongly encourage proponents **to plan their staff availability and solution demonstration within the period of August 2 to August 10, 2018,** in order to avoid impacting the timeline we have set out and to present your solution in the best possible light.

Expression of Interest

If this opportunity is of interest to you, please confirm by email to the contact listed below your intent to provide a proposal by **July 13, 2018**.

Proposal Contact

Any questions, clarifications or communications regarding this RFP should be directed to:

Maria Lopez Garcia

IT Lead

College of Physiotherapists of Ontario

mlopezgarcia@collegept.org

Questions

Proponents are encouraged to seek clarification of any aspects of the RFP to assist them to provide their best response. Questions can be directed to the contact above, via email, anytime up to the deadline date listed in the RFP Process Timetable.

No matter when the questions are submitted, the College will provide answers back only on the July 20, 2018. Answers to all questions submitted will be provided to all Proponents who submitted an intent to respond but will not identify which organization asked the question.

Addenda

The College may, at its sole discretion, amend or supplement this RFP prior to the Proposal Submission Deadline. The College shall issue changes to the RFP by Addenda only.

Submission

All proposals should be delivered before **4:00pm (EST) on July 27, 2018**. Proposals received after this deadline will be returned to the vendor and the vendor will be disqualified from our RFP process. All proposals should be received in an electronic format via email.

To:

mlopezgarcia@collegept.org

The Proponent's Proposal(s) must be received by the College at or before the Proposal Submission Deadline. Receipt of each Proposal will be confirmed via email.

Submission via email can incur unforeseen problems such as delays sending and size limitations. Please allow yourselves time for any of these unforeseen problems. We encourage Proponents to plan for alternate delivery methods, such as splitting files into more than one email.

The College is not responsible for any submission received after the stated Proposal Submission Deadline and will not consider any such submission.

Evaluation

The College will select a Proponent based on the above information and the demonstration of the following competencies:

- An understanding of Quality Assurance programs in the healthcare sector
- Demonstrated understanding of our project vision and organizational goals
- Solution fit

The evaluation and selection of a Proponent will happen as a five-stage process:

- Phase 1 – Mandatory Compliance
- Phase 2 – Technical Proposal
- Phase 3 – Presentations and Demonstrations
- Phase 4 – Pricing
- Phase 5 – Discretionary

The overall scoring will be as follows:

Phase	**Points**
Phase 1 – Mandatory Compliance	No points – Pass/Fail only
Phase 2 – Technical Proposal	35 points
Phase 3 – Presentations and Demonstrations	35 points
Phase 4 – Pricing	25 points
Phase 5 – Discretionary	5 points
Total	100 points

Phase 1 – Mandatory Compliance

All Proposals will be reviewed for completeness and compliance. Subject to the terms of this RFP, any Proposals that do not meet the mandatory requirements, either through failure-to-meet or omission, in any material respect, will be disqualified. **Schedule I** contains business and technical requirements that should be completed and included in the proponent's proposal.

Phase 2 – Technical Proposal

In Phase 2 of the Proponent evaluation process, each Proponent's Proposal will be reviewed by the Evaluation Committee and scored accordingly based on the merit of the written proposal (see **Schedule I**). The format and content that should be included in the proposal are described in the section "Proposal Structure".

Phase 3 – Presentations and Demonstrations

Phase 3 of the evaluation process will involve interacting with the selected Proponents to enable the College to gain additional understanding regarding their Proposals. This will include:

- Presentations from the Proponent highlighting the key advantages of their Proposal
- Interactive demonstrations to be conducted by representatives of the Proponent who will work with the College's expert users to show how the proposed solution meets the College's requirements. This will include the running of scripted scenarios.
- Discussions between the College and the Proponent's references to understand the experience of working with the Proponent. Potentially the College may request the opportunity to visit a site where the Proponent's solution is live.

The allocation of points for Phase 3 is:

Section	Max Score
Proponent Presentation	10
Process and Technical Scenarios and Demonstrations	25
Total	35

Phase 4 – Pricing

Following the completion of Phase 3, Phase 4 of the evaluation process will involve reviewing the cost of the proposed solutions based on the pricing information set out in the Proponent's Proposal and from the perspective of Total Cost of Ownership for the expected life of the Proponent's proposed solution. Proponent Proposals will be normalized, and Proponents will be awarded points based on the College's assessment of the Total Cost of Ownership. The formula used for awarding points for the pricing component of the evaluation will be as follows:

Score = {1 – (Proponent Price – Lowest Price) / Highest Price} x Max Points Score

Phase 5- Discretionary

The College has set aside 5% of the evaluation points as discretionary. Proponents are encouraged to demonstrate innovation through unique abilities, features, functions or services that the Proponent believes would be valuable to the College and may not be specifically identified in this RFP. Where vendors demonstrate valuable innovation, the College may choose to award discretionary points to that vendor.

Final Scoring

Final scoring of the Proponent submissions will be based on the combined scores achieved in Phases 2, 3, 4 and 5.

Other Evaluation Considerations

At any stage during the evaluation process, the College may:

- Request further clarification on any aspect of the Proponent's response
- Request a Proponent to supply additional information to support its response
- Complete a statement of requirements supplementary to this RFP as a result of matters raised by the evaluation or subsequent reference checks
- Choose which vendors progress through each phase of evaluation based on the accumulated scores

Terms and Conditions

Confidentiality

The Consultant warrants that it shall be aware of and abide by all College policies and procedures as relevant and applicable including but not limited to the following policies: Conflict of Interest, Confidentiality, Privacy and Attitude and Conduct.

- The Consultant acknowledges that any information concerning the business and affairs of the College or its agents, employees, patients, and clients of whom the Consultant, its agents or employees become aware in the course of providing any such Services and or Deliverables shall be treated as confidential or private. The Consultant agrees to take such measures to protect such information, as it would be reasonably expected to take to protect its own confidential or private information and to comply with any and all patient privacy legislation.
- The Consultant agrees that the terms of any agreement it may have with the College is confidential and may only be divulged with the College's express written consent.
- Confidential Information shall not include information that:
  (i) is or becomes generally known or available to the public at large other than as a result of a breach by the Receiving Party of any obligation to the Disclosing Party;
  (ii) was known to the Receiving Party free of any obligation of confidence prior to disclosure by the Disclosing Party;
  (iii) is disclosed to the Receiving Party on a non- confidential basis by a third party who did not owe an obligation of confidence to the Disclosing Party; or
  (iv) is developed by the Receiving Party independently of and without reference to any part of the Confidential Information. Confidential Information shall not be deemed to be in the public domain or generally known or available to the public merely because any part of said information is embodied in general disclosures or because individual features, components or combinations thereof are now or become known to the public.

Irrevocability of Proposals

By submission of a clear and detailed written notice, the Proponent may amend or withdraw its proposal prior to the closing date and time. Upon closing time, all proposals become irrevocable. By submission of a proposal, the Proponent agrees that should its proposal be deemed successful the Proponent will enter into a Contract with the College.

Proposal Expiry Date

Proponents hereby acknowledge that offers contained within their Proposals shall be irrevocable for a period of one hundred and twenty (180 days) from the Closing Time or until a Contract is signed with the Contractor, whichever comes first.

Proponents' Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the College, if any. If the College elects to reject all proposals, the College will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

Lobbying Prohibited

All Proponents, including their subcontractors, consultants, agents, officials and employees will not engage in any form of lobbying whatsoever with respect to this RFP or seek to influence the outcome of this RFP process. In the event of any such lobbying, the College may elect to reject the Proponent's submission without further consideration. All correspondence or contact by interested parties with the College with respect to this RFP must be directly and only with the representative designated by the College.

Sub-Contracting

Using a sub-consultant (who must be clearly identified in the proposal) is acceptable. This includes a joint submission by two Proponents having no formal corporate links. However, in this case, one of these Proponents must be prepared to take overall responsibility for successful interconnection of the two products or service lines and this must be defined in the proposal.

Indemnification

The Contractor shall indemnify and hold harmless the College, its officers, board members, partners, agents and employees from and against all actions, claims, demands, losses, costs, damages, suits or proceedings whatsoever that may be brought against or made upon the College and against all losses, liabilities, judgements, claims, suits, demands or expenses which the College may sustain, suffer or be put to resulting from or arising out of the Contractor's failure to exercise reasonable care, skill or diligence or omissions in the performance or rendering of any work or service required hereunder to be performed or rendered by the Contractor, its agents, officials and employees. This indemnification shall include any legal costs incurred by the College on a substantial indemnity basis, including those incurred to defend any criminal prosecutions against the College resulting from the actions of the Contractor.

Patents and Copyrights

The Proponent shall, at their own expense, defend all claims, actions or proceedings against the College based on any allegations that the proposal or any work or any part of the work arising there from constitutes any infringement of any patent, copyright or other proprietary right, and shall pay to the College all costs, damages, charges and expenses, including its lawyers' fees on a substantial indemnity basis occasioned to the College by reason thereof.

Submission Requirements

To allow the College to conduct a fair comparison between proposals, we request that all Proponents structure their response in the manner described in this section.

Submission – Two Parts

Submit proposal in **two separate volumes. It should be clear from the naming or folder structure which volume each file belongs to:**

- **Volume I – TECHNICAL/SERVICE PROPOSAL**
  The Technical Proposal describes your proposed solution including its ability to meet the requirements we have requested in **Schedule I**. It shall not contain pricing nor financial data. The inclusion of any pricing or financial data within the Technical Proposal may render the Proponent's proposal invalid.

- **Volume II - FINANCIAL PROPOSAL**
  This volume will contain the detailed pricing information in the format specified in **Schedule II**, plus any summary or descriptive information you feel will aid our understanding of your Financial Proposal. All prices are to be quoted in Canadian dollars with Harmonized Sales Tax (HST) shown separately.

Submission by email:

- Title of the email should contain **"Quality Assurance Program Software Support Tool" and name of the Proponent**

When submitting their Proposal, the Proponent should ensure:

- All documents are in a Microsoft Word, Microsoft PowerPoint, Microsoft Project, Microsoft Excel or searchable PDF format
- Completed versions of Schedules I and II shall be submitted in Microsoft Excel format using the files provided

For clarity, we suggest creating two folders, Technical and Financial, which contain your Proposal documents.

Proposal must be written in English.

Proposal Structure

Within your Technical Proposal please provide the following information:

1. Understanding and Background: A description of your understanding of the requirements of the College for this project. A description of your company, highlighting why you are suitable to assist the College with this project, include examples of similar projects and three references
2. Solution: Describe your proposed solution and how it can meet the requirements of the College
3. Approach: Describe your proposed approach and methodology for all aspects of work requested in the section Required Products and Services. Outline a project schedule with key activities, phases, deliverables, milestones and key dates. Identify the time commitment you expect from College staff during the period of the project, including any specific periods of increased focus from College staff
4. Team: Describe the team you propose to deliver the project, include an organizational structure, role descriptions and resumes for your team members
5. Terms and conditions

The technical proposal shall also include the completed requirements spreadsheets contained in **Schedule I** of this RFP.

The Financial Proposal structure is outlined within **Schedule II**. When completed, your financial proposal should contain all costs related to delivering the solution. You are free to provide any supporting information to your financial proposal in a form you favor, however, any additional information should contain no additional costs.

Appendix

The New Quality Assurance Program

The Council of the College of Physiotherapists of Ontario approved a new Quality Assurance Program in principle in December 2017. The new program is based on the recommendations from the Quality Assurance Working Group.

About the Quality Assurance Working Group

The Quality Assurance Working Group ("WG") is comprised of Gary Rehan, President; Darryn Mandel, Council Member; James Lee, Council and Quality Assurance Committee Member; Theresa Stevens, Council Member and Chair of Quality Assurance Committee; Jatinder Bain, Quality Assurance Committee Member; Shelley Martin, Manager, Quality Assurance; and Jill Adolphe, Citizens Advisory Group Member.

The WG was asked to consider what changes to the Quality Assurance Program, if any, might increase its positive impact on practice without increasing cost.

Overview of the New Quality Assurance Program

The program will have the following components (Figure 1):

1. Mandatory education: Each year, all members will be required to complete an on-line mandatory education activity (similar to the current PISA [the Professional Issues Self Assessment]).
2. Practice assessment: All members will go through a modified assessment process over a 5-year cycle. They will be selected based on how long it has been since they were last assessed. No member who is successful in his or her peer assessment will be subject to reassessment within a 5-year cycle.

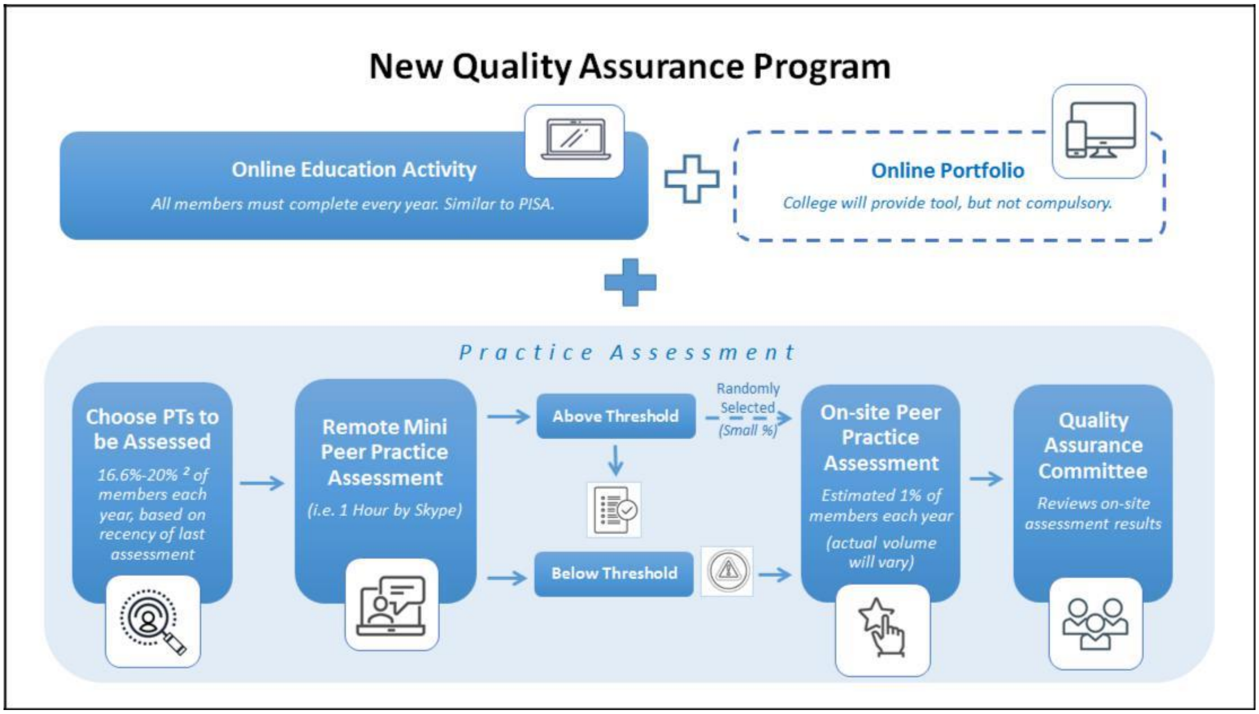
   Each year, a cohort of members will be selected for assessment. Everyone in the cohort will participate in a short remote peer assessment, conducted using video teleconferencing. The purpose of the remote assessment is to identify PTs who need a more in-depth on-site assessment.

   - Those who fall below a pre-determined threshold will be directed to participate in an in-depth on-site peer practice assessment.
   - A small (yet to be determined) percentage of those who are above the pre -determined threshold will be randomly selected for an in-depth on-site peer practice assessment. The purpose is to blind the selection process to prevent stigma and bias.

   On-site peer assessment results will be reported to the Quality Assurance Committee, as today.

3. Members will still be required to participate in ongoing learning and improvement, however the keeping of a portfolio will not be mandatory. An electronic "portfolio" tool will be made available to members through our website if they choose to use it.

Figure 1: The New Quality Assurance Program



Background

The compulsory educational activity presently known as PISA has value and should be retained but can be improved. The activity should be renamed to reflect that it is not about self -assessment. It will continue to be open-book and compulsory. The College will continue to identify annual topics based on analysis of practice data and trends that would indicate where there seems to be an educational need.

In future, it may be possible to create different educational modules for different segments of the PT population.

The WG took into account research that demonstrated the beneficial impact of assessments as well as the consultation feedback that indicated strong support for practice assessments. The WG also recognized that the College's own research has demonstrated that assessments have a beneficial impact for at least 7 years. On this basis, the WG determined that it would not be unreasonable to space assessments at time frames within this window. Assessing all members within a relatively short time frame was considered to be the best approach for public protection.

The WG felt, based on anecdotal evidence and experience, that in most cases, it is possible to identify problematic practices relatively quickly. The WG believed that much of the utility of the on-site assessment could be attained through a briefer, remote assessment. This would reduce costs significantly, which would permit increased volume without increased expense.

Practitioners whose remote assessments suggest concerns about their practice would be required to undergo a more in-depth on-site assessment.

To avoid the stigma associated with being selected for an on-site assessment (i.e. colleagues being aware that selection for on-site assessment must be a result of practice problems having been identified), a certain number of PTs will be randomly selected to do the on-site assessments during each program cycle. All PTs in the assessment cohort will participate in the remote assessment, and then a small number of PTs are randomly selected from those who are above the threshold.

Practitioners would be selected for assessment based on the time since they had their last assessment. Accordingly, in the first year of the program those who have never before been assessed would be selected.

Other Required Activities

In addition to the Quality Assurance Program described above, the Jurisprudence module will continue to be a required activity for all members. The module tests the understanding of members of the application of practice standards, of legislation and of rules related to practice in Ontario.

Instructions

Importance	Definition
Mandatory	If the solution does not meet the requirement, the proposal will be dropped from the evaluation.
Important	Not meeting the requirement would have a substantial impact on CPO operations, vendor's score would be substantially affected.
Desirable	CPO operations would benefit from the capability, but other approaches are available to meet the need.

Compliance	Definition
Compliant	The solution supports the requirement with only configuration required.
Customization	The solution requires new functionality to be developed to meet the requirement. The costs of this customization are included with our estimates.
Adapter	The solution requires the development of an interface or the use of a 3rd party adapter to deliver the requirement. The costs of these products are included within our estimates.
Not supported	The solution cannot meet this requirement and you do not plan to have that capability within the product in the next 24 months.
Future	The requirement will be met by functionality you plan to include in a future release of the product within the next 24 months.

ID	Process	Sub Process	Requirement	System	Priority	Compliance	Comments
General Requirements							
1.01	General	Reporting	Flexible reporting tool for business reporting and analytics that allows ad hoc reporting by users	Assessment Tool	Desirable		
1.02	General	Reporting	When reports are generated they can be sorted and filter by any of the fields included in the report	Assessment Tool	Desirable		
1.03	General	Workflow	Ability to define automated notifications that can be trigger by system events or dates	Assessment Tool	Desirable		
1.04	General	Workflow	Notifications to users when work is pending their action	Assessment Tool	Desirable		
Cloud Requirements							
2.05	Security	Server and Data	Data center must be located in Canada	Assessment Tool	Important		
2.06	Security	Server and Data	Data center and system to be compliant with the following: PHIPA, PIPEDA, RHPA	Assessment Tool	Important		
2.07	Security	Access Controls	Role based access controls. It should be able to create role to granular layer. IT should have different security role that able to perform different layer of IT functions within the application	Assessment Tool	Important		
2.08	Integration	Integration	Application should have API to integrate with the following: CRM platform	Assessment Tool	Mandatory		
2.09	Integration	Data Export	Application should have an function to support bulk data export	Assessment Tool	Important		
2.1	Integration	Data Import	Application should have a function to support bulk data import	Assessment Tool	Important		
2.11	System Adminis	System Manager	IT should be able to perform diagnostics without logging out all users	Assessment Tool	Desirable		
2.12	Client compatibil	Applications	Web based should support majority browsers e.g. IE, Edge, Chrome, Firefox, Safari.	Assessment Tool	Important		
2.13	Client compatibil	Operating systen	Applications must run in MS Windows 7 and higher	Assessment Tool	Important		
2.14	Client compatibil	Other application	Applications must support MS Office 2013 or above, if used	Assessment Tool	Important		
2.15	Client compatibil	Mobile	Ability for QA tool to be supported by web browser to allow remote access by PT's (laptops, phones etc.)	Assessment Tool	Important		
2.16	Client compatibil	Mobile	Able to run on Apple iOS and Android device.	Assessment Tool	Important		
2.17	Client compatibil	Mobile	Must be communicated with encrypted data stream.	Assessment Tool	Important		
2.18	Performance	User	Must support >9000 general users	Assessment Tool	Desirable		

ID	Process	Sub Process	Requirement	Priority	Compliance	Comments
2.01	Select	Member Questionnaire	Ability to import a set of member data from the current CRM	Important		
2.02	Select	Member Questionnaire	Ability to assign the member a unique identifier (e.g. the QA file # used in Atlas)	Important		
2.03	Select	Member Questionnaire	Ability to refer PT's from Members' Portal to tool (e.g. PT's log in through the portal which links to the assessment tool)	Desirable		
2.04	Select	Member Questionnaire	Ability for QA tool to be supported by web browser to allow remote access by PT's (laptops, phones etc.)	Mandatory		
2.05	Select	Member Questionnaire	Ability to define specific attributes of PT's (e.g. role can be non-clinical vs clinical, type of practice can be)	Important		
2.06	Select	Member Questionnaire	Ability to store questions and assign to specific assessment type (e.g. questionnaire, remote or on-site)	Mandatory		
2.07	Select	Member Questionnaire	Business rules to generate questionnaire based on defined criteria (e.g. generate a questionnaire based on PT role and practice type)	Important		
2.08	Select	Member Questionnaire	Ability to complete assessment and submit through software remotely	Mandatory		
2.09	Select	Scheduling	Support in scheduling assessments through online booking capability (e.g. assessors to input available times in a calendar format and then PT's to select from those times) through the tool or a potential add-on	Important		

2.1	Select	Scheduling	Support system generated notification to QA staff when assessment is scheduled	Desirable		
2.11	Remote Assessm	Remote Questionnaire	Item (question) management functionality	Mandatory		
2.12	Remote Assessm	Remote Questionnaire	Ability to import PT profile data from Atlas (e.g. location, practice type, years of service etc.)	Mandatory		
2.13	Remote Assessm	Remote Questionnaire	Ability to link and assign remote questions to questionnaire questions	Important		
2.14	Remote Assessm	Remote Questionnaire	Business rules to generate remote assessment questionnaire based on answers to pre-questionnaire and pre-defined profiles (e.g. if pre-questionnaire question 4 answer b, then assign remote question x)	Important		
2.15	Remote Assessm	Remote Questionnaire	Ability to link specific items to each question including a script, additional probing questions for assessor, a scoring cue and answer choices	Important		
2.16	Remote Assessm	Remote Questionnaire	Ability to establish and define authority for QA staff to maintain (alter / update) questions in the question bank and the linked items (scoring cue, script, probing questions)	Important		
2.17	Remote Assessm	Remote Questionnaire	Ability to track question history (e.g. the birth and death date, date of question alteration, date of updates to linked items etc.)	Important		
2.18	Remote Assessm	Remote Questionnaire	Ability to define answers choices for each question (e.g. yes or no, ranking 0, 1 or 2, etc.)	Mandatory		

2.19	Remote Assessm	Conduct Assessment	Ability for assessors to input scores and comments to questions in real-time (e.g. during the assessment, enter the PT's answers)	Important		
2.2	Remote Assessm	Conduct Assessment	Capability for offline access to assessment questions and storage of data, and input answers to be accepted once online	Important		
2.21	Remote Assessm	Conduct Assessment	Ability to set submission deadline and synch with Atlas	Desirable		
2.22	Remote Assessm	Conduct Assessment	Ability to track assessment completion and submission dates.	Important		
2.23	Remote Assessm	Identify Pass / Fail	Ability to identify pass / fail at moment of submission	Important		
2.24	Remote Assessm	Identify Pass / Fail	Business rules to define the criticality level of questions	Important		
2.25	Remote Assessm	Identify Pass / Fail	Ability to assign criticality level to questions	Desirable		
2.26	Remote Assessm	Identify Pass / Fail	Ability to assign scoring rules to each criticality level	Desirable		
2.27	Remote Assessm	Identify Pass / Fail	Business rules to define outcomes for each criticality level: - (A) Business rules will define a specific subset of questions as "critical" and if answered incorrectly, then define as fail	Mandatory		

2.28	Remote Assessm	Identify Pass / Fail	Ability to define a minimum required score ("cut score")	Important		
2.29	Remote Assessm	Identify Pass / Fail	Ability to establish and define authority for QA staff to maintain (alter / update) "cut score"	Important		
2.3	Remote Assessm	Identify Pass / Fail	Ability to calculate remote assessment score	Important		
2.31	Remote Assessm	Identify Pass / Fail	Ability to compare remote assessment score to cut score	Important		
2.32	Remote Assessm	Identify Pass / Fail	Business rules to identify remote assessment score as pass or fail (e.g. if remote assessment score less than cut score, then define as fail)	Important		
2.33	Remote Assessm	Identify Pass / Fail	Export results of the QA assessment at specific points in the process (e.g. end of questionnaire, end of remote assessment, end of on-site assessment)	Mandatory		
2.34	Remote Assessm	Report on QA Outcom	Ability to auto-generate report based on pre-defined criteria and fields from the remote assessment (e.g. question, scores, comments)	Desirable		
2.35	Remote Assessm	Report on QA Outcom	Ability to upload information from tool to CRM through basic integration (e.g. date stamps for the completion and submission dates, the unique identifier)	Mandatory		
2.36	On-site Assessm	On-site Questionnaire	[see remote questionnaire for question requirements]			

2.37	On-site Assessm	Identify Pass / Fail	[see remote assessment - identify pass / fail for requirements]			

Instructions

To help make the pricing more comparable, we ask that each proponent fill the pricing tabs in this workbook.

As you develop your pricing, please use the tables provided here for your costs.   Within the pricing summary tab, we ask you to provide the costs for the products and services described in the RFP. Please break them down into the quantity of each product or service unit and the unit price. Quantity could be number, hours or other measures of quantity. If there is no unit driver (e.g. fixed fee amount) than enter "Fixed Fee - Not applicable"). Where required document any material pricing assumptions.   The additional comments column allows the proponent to further explain any aspects of the pricing that needs clarification.

If you have any questions please contact (as per the RFP):
Maria Lopez Garcia
Phone: 416.591.3828 ext. 229
Email: mlopezgarcia@collegept.org

Pricing Schedule

	Reference	Type	**Unit Driver** (if applicable)	# of Units
Software Licensing	See RFP section "Required Products and Services"	Ongoing		
Cloud / Hosting Services	See RFP section "Required Products and Services"	Ongoing		
Implementation Services	See RFP section "Required Products and Services"	One-time		
Professional Services	See RFP section "Required Products and Services"	One-time		
Total				

		Pricing Assumptions
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Price per Unit	Y1	Y2	Y3	Y4	Y5	5 Year Total
						$ -
						$ -
						$ -
						$ -
	$ -	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**

Additional Comments

	Role	Day Rate
Example	***Project Manager***	***$***
1		
2		
3		
4		