



College of Traditional Chinese Medicine
Practitioners and Acupuncturists of Ontario
Ordre des praticiens en médecine traditionnelle
chinoise et des acupuncteurs de l'Ontario

Request for Proposal

MS Dynamics CRM system upgrade and expansion project

College of Traditional Chinese Medicine Practitioners and Acupuncturists of Ontario

Version **V4.1**

Modified Date: **8 September 2025**



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Part 1 – Introduction

1.1 Invitation to Vendors

This Request for Proposals ("RFP") is an invitation to prospective Vendors to submit proposals for the Customer Relationship Management System (CRMS) upgrade as described in Part 2 - The Deliverables (the "Deliverables"). This RFP is issued by the College of Traditional Chinese Medicine Practitioners and Acupuncturists of Ontario (The College) represented by the Registrar.

1.2 Type of Contract for Deliverables

The selected Vendor will need to sign an agreement with the College for the delivery of the specified services. The College intends to enter into a Form of Agreement with only one (1) legal entity. The agreement will be for a maximum of 1 year, during which the proponent is expected to complete the project. This will be followed by up to 5 years of providing maintenance and administration services as outlined in the Deliverables.

1.3 Definitions

Unless otherwise specified in this RFP, capitalized words and phrases have the meaning set out in a Form of Agreement.

"Ministry" means	The Ontario Ministry of Health
"College" means	The College of Traditional Chinese Medicine Practitioners and Acupuncturists of Ontario.
"College contact" means	Sean Cassman, Registrar & CEO Email: sean.cassman@ctcmpao.on.ca Francesco Ortale, Director of IT, Finance and Corporate Services. Email: francesco.ortale@ctcmpao.on.ca
"RHPA" means	Regulated Health Professions Act (1991)
"CRMS" means	Customer Relations Management System
"Users" means	The members, volunteers and employees of the College of Traditional Chinese Medicine Practitioners and Acupuncturists of Ontario.



Part 2 – The Deliverables

2.0 Background

The College is the governing body established by the government of Ontario, under the *Regulated Health Professions Act, 1991* and the *Traditional Chinese Medicine Act, 2006*, to regulate the profession of traditional Chinese medicine. The law in Ontario requires that every practitioner be a registered member of the College. The College's mandate is to serve and protect the public.

2.1 Customer Relationship Management System

The purpose of the CRMS Project is to enable the College to upgrade or replace its existing MS Dynamics 2015 CRM on-premises system with MS Dynamics CRM 365 or another CRM system that fully meets the College's specific requirements, including integration with its website and systems to support its functions and operations.

The College is issuing this RFP to find a vendor experienced in CRM development (within well-known CRM Systems) that can provide a suitable pre-existing software solution, along with necessary modifications and programming to ensure a successful migration and to meet additional functionality needs.

2.2 Overview of Project Stages

Stage 1: Systems Design

- **Project planning, systems analysis, and requirements definition:** Define the project scope, risks, and requirements to translate project goals into specific functions and operations of the intended applications. Analyze the information needs of end-users across four different client groups: the College, the members, the potential applicants, and the public.
- **Systems design:** The Vendor is expected at this stage to provide a detailed plan to include descriptions of the desired features and operations, business rules, process diagrams, and other documentation.

Stage 2: Development, Implementation and data migration

- **Systems development:** The Vendor will customize pre-existing software and develop components to satisfy the desired functions and operations as planned in the Systems Design phase.
- **Integration and testing:** The Vendor is required to establish a testing environment which will enable user testing to check for errors, bugs and interoperability.
- **Acceptance, installation, deployment:** The final stage of initial development, where the software is integrated into the College's existing systems and put into operation for actual business.

Stage 3: Maintenance and Training

- **Maintenance:** The College will require ongoing support from the Vendor during the life of the contract. Specifically, to implement and respond to changes as required by the College.



- **Training:** Provide the College with full functionality systems training and manual.
- **Handover:** The College will evaluate its experience with the CRMS administration and maintenance during the period of this contract and will develop a long-term plan for ongoing administration for the period after the initial service agreement.

2.3 Prohibited Communications, Confidential Information

2.3.1 Prohibited Vendor Communications

Vendors shall not engage in any Conflict-of-Interest communications and should take note of the Conflict-of-Interest declaration as set out in the Form of Offer.

2.3.2 Vendor(s) Not to Communicate with Media

A Vendor may not at any time directly or indirectly communicate with the media in relation to this RFP or any contract awarded pursuant to this RFP without first obtaining the written permission of the College Contact.

2.3.3 Confidential Information of the College

All information provided by or obtained from the College in any form in connection with this RFP, either before or after the issuance of this RFP:

- a) is the sole property of the College and must be treated as confidential.
- b) is not to be used for any purpose other than replying to this RFP and the performance of any subsequent Contract.
- c) must not be disclosed without prior written authorization from the College, as set out under section 36 of the RHPA; and
- d) shall be returned by the Vendor(s) to the College immediately upon the request of the College.



Part 3 – Systems Development Requirements for the upgrade/replacement of CRM and website

3.1 Assignment/Project Requirements

3.1.1 Background and current functionality

The college's website is currently integrated with its Customer Relationship Management System (CRM) to offer interactive features. This integration enables members of the profession to register, complete their annual renewals, apply for various opportunities, pay any outstanding fees, and update their demographic information. This also involves several key programs, including inquiries, complaints, reports, discipline, and quality assurance — all of which require “back office” support. The systems and data may be hosted internally and separately by the Vendor, with appropriate security measures in place.

As other health regulatory Colleges in Ontario have recognized, this requires the development of a strong and efficient CRMS that manages all the “back office” operations mentioned earlier, while also serving as the main communication tool and public face for the College.

3.1.2 Integrated Database Management System Requirements

The College understands that completing the CRMS development project will likely take several months and should be phased. The initial six months should deliver existing functionality to support registration and essential business functions, while other features follow and may run in parallel to maintain the current MS Dynamics CRM system's operational status.

3.1.3 Description of Common Functionality for CRM

The list below outlines some of the existing and new individual features identified for the College. The expectation is that authorized staff can customise or modify many of these features as necessary, without needing to submit a Change Request to the provider.

Membership Management – Public and Protected Information

Registration and Application Management

- Allow applicants to create a secure online account where they can perform various functions, including logging into the website to complete applications and pay fees, having separate screens for recording education/training, clinical experience, supervision hours, attaching documents, generating correspondence, and tracking the progress of their applications.
- Generate a unique user ID for new accounts, allowing for different criteria to be established for IDs depending on account type, if desired.
- Notifications are auto-generated and sent to the applicant and recorded to confirm registration or advise of other important events. Notifications are also to be generated internally when certain activities are performed by external users (e.g., uploading a new document, applying for an examination, or registering).



- Some web-based forms will need to be saved as PDF documents upon completion (for example: applications).
- Allow staff to store documents within applicant and member accounts, with the ability to restrict visibility as needed.

Membership Management System

- Allow College Staff to input data about members and manage the membership efficiently and effectively.
- Retain existing unique ID for existing members/applicants (CTCMPAO Number)

Online Profile Management

- Allow members to log on to the website using a unique username and password to edit some parts of their own membership information, as defined by the College.

Public Register

- Up-to-date information about members of the College.
- Integration with the College website should ensure that a change to the membership database will change corresponding fields in the public registry.
- Enable the public to search for members by name, location, business name and areas of practice.

Communications

Customer Contact Management

- Tracking of contact with stakeholders (including but not necessarily limited to members) via notations in profiles or other files, accessible only to authorized staff using pull-down menus based on role constraints.

E-mail Broadcast system

- e-mail broadcasts to individuals, groups or all members and stakeholders.
- Tracking of email communications, with linkages to member profile (including renewal reminders, notice of meetings and elections, official receipts of fees and special notices).

Live broadcast

- Real-time webcast capability for public meetings, courses or other College events.

Website Feedback

- Inquiries, surveys and other feedback.

Content Management System

- Capability for College staff to develop and render edits to the website without Information Technology (IT) support.



Transactions

Online Registration Renewal

- Allow members of the College to renew their registration online.

Online Applications and Courses

- Allow members of the College to complete existing applications and outstanding fees transactions when applicable.

Online Payment Processing

- Online payment processing for renewal of fees, application submissions, materials, and other transactions.

Providing Receipts

- Generate descriptive receipts for online transactions.

Accounting

- Tracking of all payments made manually or online, including annual fees, purchases and other payments.
- Linked to the overall accounting system for the College. This module may include all accounting features based on generally accepted accounting principles (receivables, payables, production of receipts for fee payments, statements and reports).

Operations Management for College and Committees

Inquiries, Reports, Complaints, Discipline and Fitness to Practice

- Assign numbers to inquiries, complaints, reports, discipline and fitness-to-practice files and associate them with a member's profile.
- Automated deadline tracking and reminders for letters and documentation related to the inquiries, complaints, reports, and discipline processes.
- Record discipline findings and publish them online and in the public registry.
- Firewall files of Inquiries, Complaints and Reports Committee, Discipline Committee, Quality Practice, and Fitness-to-Practice, with access for authorized staff only.
- Assign Committee members to various statutory and non-statutory committees, limiting online committee access to authorized information and designated pages.
- Enable instant communication within committees.
- Allow for the creation of non-member profiles such as unauthorized practitioners, investigators, etc.)

Terms, Conditions and/or Limitations

- Tag member profile with any terms, conditions, or limitations placed on a license to practice.
- Track undertakings by members to meet requirements for terms, conditions, or limitations to be lifted.
- Automatically notify members or staff of deadlines to meet requirements.
- Update member profile when terms, conditions or limitations are lifted or extended.



Reports

- Generate pre-formatted reports from the database, such as applications, summaries, member profiles, and renewals.
- Ability to create user-friendly, unique reports
- Analysis of members' personal information to generate reports of membership demographic information (age, gender, location, origin of training, etc.)
- Ability to add new data fields as needed for reporting purposes.

Elections

- Online voting by members and posting of election results by the districts of the College.
- Online information and nomination process for candidates.
- Candidate biographies, photos and other election information access.

Quality Practice

- Capability to host a professional development portfolio for each member, allowing College input for completed courses/exams, volunteer service, etc.
- Ability to assign numbers to QA files and pull information associated with a member's profile.
- Online quality assurance reporting by members, with firewall access by authorized staff only and QA members.
- Tracking deadlines and compliance with QA outcomes by members and automated reminder communications.
- Mechanism for choosing members for random (or stratified random) selection, specific criteria as identified by the QA Committee or criteria for excluding members previously assessed
- Assign Committee members to online committee access only to authorized information and designated pages.
- Capability to enable members to complete the Self-assessment online, with the ability to host self-testing questions without these being stored.
- Automated deadline tracking and reminders to staff, to produce form letters for the Quality Assurance Committee.

Patient Relations

- Assign file numbers to patient relations funding requests.
- Automated deadline tracking and reminders to staff, to produce form letters for the Patient Relations Committee.

Event Management

- Conduct online registration, including the processing of payment, for events to be delivered in the future.

Surveys and Polls

- Polling of members and the public via the website, on important items such as changes to by-law and regulation based on PIPEDA research requirements and generally accepted research principles.
- Tabulation and reporting of polling results.



Records and Task Management

- Maintenance and tracking of electronic records for the College.
- College management and staff assign and track tasks and measure performance against deadlines.

e-Learning and Examinations/Assessment

Online Exams/Assessment

- Administer computer-based examinations/assessments for registration and certifications, either from stations on-site or from remote member-based locations.

Tracking

- Record results onto the member's profile and special codes or flags automatically put on in response to pre-determined criteria such as payment and renewal deadlines, reporting deadlines.

Online courses

- Access to webinars and/or online courses via links to the course provider's website.

3.2 System Conditions and Parameters

The following business decisions describe some of the conditions which must be met by the CRM and website:

System Platform

- A Security Manual should be created with clearly defined access levels. Since the databases will contain members' personal information, possibly including health data of complainants, and information about some members, it is crucial to implement strong security measures and firewalls to protect the privacy of both members and complainants within the guidelines outlined in the RHPA.
- Appropriate backup procedures and programmatic redundancies will be necessary to prevent data loss.
- Access to the databases will be tiered, starting with basic member access and advancing to College-assigned authority for content management. A secure login will be required for database access, requesting personal information such as name and personal identification number or password.

System Users

- A variety of users will access the system with different needs. Assume that users will be non-technical and require a system that is easy to access and navigate. The CRM need to be role-based, since specific information must be visible only to specific roles:
 - All staff will be granted a level of access to the system that matches their duties and responsibilities. Only designated staff will have access to all system areas with administrative rights. System administrators should be able to modify existing information and add new data.
 - Membership will access the system through the new College's website and require secure, personalised access to apply for or renew membership, create and modify



individual profiles, make transaction payments, etc. Note: There will be approximately 3,000 members.

- Council and Committee members and staff will use the system to access files for meetings.
- Members of the public will access the member database to review the public registry, which will be a subset of information contained in the member's database. The public register must be accessible directly from the website.
- Each member file will contain information accessible only to staff, some information accessible to both staff and members, and some information that is publicly available as the public registry.

Data Migration

- A data migration strategy and a comprehensive plan for transferring data from the existing system to the new one, encompassing stages such as planning, preparation, implementation, testing, and maintenance. The objective is to ensure data integrity, minimize business disruption, and achieve project objectives.

Cost effective

- The system must be cost-effective, easy to manage and should enable College staff to make certain changes without having to incur development costs.

Scalable

- The system should be scalable to enable the addition of various functions through software integration and support the growth of the database.

Flexible

- New connections between different functions will be needed to deliver custom reports.
- The system should enable integration with other commonly used software, such as Microsoft packages and accounting software.

Maintenance and Service

The Vendor will sign an agreement with the College, where the Vendor must provide ongoing maintenance and service as outlined in the Form of Agreement, which must include the following provisions:

- The College requires an agreement of up to 5 years during which the Vendor will provide support and maintenance for the system, including a helpdesk or hotline for college members and staff to resolve issues.
- The College requires the Vendor to designate a lead person responsible for managing the College system, with whom the College staff can discuss plans.



- The College requires the Vendor to provide a framework for discussing changes to the system, including rates, and the type and levels of all Vendor staff assigned to the work.

Requirements Pertaining to the Accessibility for Ontarians with Disabilities Act

The College must comply with the Accessibility for Ontarians with Disabilities Act. Vendors invited to submit proposals are asked to inform the College if staff might face accessibility issues. Any special requirements disclosed by vendors will be considered and, where possible, accommodated in accordance with the Act.

Contractor Security Screening

Considering the sensitive nature of this project and the information involved, the hired Vendor must specify what security clearances or provisions are currently in place for any staff who may access the College's data. The Vendor might be required to establish additional security clearances at their own expense if the College specifies a standard.

Software Launch and Implementation

To ensure a secure and seamless transition of the College's operations, vendors are required to include a process for software launch and implementation in their project plan. Vendors must include the following in the plan:

- Integration of the database with Colleges' websites and software.
- Complete data migration from existing systems to the new system.
- Provide sufficient training to all staff and advanced training for the College-designated super users.
- A helpline or one point of contact for all CRM queries and troubleshooting issues.
- Provide system testing and monitoring.

Handover

The College will review its experience with the CRM, including administration and maintenance, during the term of this contract. It will also develop a long-term plan for ongoing administration beyond the initial five-year service agreement.

Part 4- Price Breakdown

Please provide a detailed Price Breakdown of the product and services to be supplied, including a description of each component, the timeline, and the associated costs. If the Vendor offers a standard software migration package, kindly specify the price of this package and clearly identify the components included in the description section.