SafeCare BC

Request for Proposal (RFP)

Project Title: OHS self-assessment and action planning portal

Issued by: SafeCare BC
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1. Introduction and overview

SafeCare BC invites proposals from qualified vendors for the design, development, and implementation of a secure, scalable Occupational Health and Safety (OHS) Self-Assessment and Action Planning Portal. The tool will empower member organizations to assess and improve their OHS programs, including psychological health and safety, while providing SafeCare BC consultants with tools to monitor progress and deliver tailored support.

2. Organizational background

SafeCare BC is the health and safety association for more than 900 member organizations in British Columbia's long-term care and home health support sectors. We provide training, resources, and consultation to reduce workplace injuries and enhance well-being across the province. This project represents a strategic initiative to deliver personalized, data-driven OHS guidance at scale.

3. Scope of work and detailed requirements

The selected vendor will deliver an end-to-end solution, including discovery, design, development, testing, integration, and deployment. Key functional areas include member authentication, self-assessment, action planning, data visualization, and backend interfaces for consultants and administrators.

3.1 User roles and characteristics

The Portal must accommodate the following user roles:

- **Primary member user:** A leadership or administrative representative from a member organization (HR, CEO, etc.) with full control over their organization's account.
- **Secondary member user:** A designated "contributor" (e.g., OHS officer) from a member organization with rights to view information and update task statuses.
- **Consultant user:** An internal SafeCare BC consultant who monitors member progress and provides personalized recommendations through a backend interface.
- **Administrator user:** An internal SafeCare BC user (e.g., Communications team) with high technical proficiency responsible for managing assessment content and system logic.

3.2 Detailed functional requirements

The following requirements form the core feature set of the Portal.

3.2.1 Member authentication and onboarding

- **FR-AUTH-001: New member registration form:** The system shall provide a public-facing registration form on the WordPress website. The form shall collect: full name, title, organization name, sector, email, phone, address, and CU (classification unit) number.
- **FR-AUTH-002: Registration submission confirmation:** The system shall display a confirmation message and send a confirmation email upon submission.
- **FR-AUTH-003: Consultant approval queue:** The system shall provide a backend interface for Consultant Users to view and manage pending registration requests.
- **FR-AUTH-004: Registration approval and rejection:** Consultants shall have the ability to "Approve" or "Reject" registrations.
- **FR-AUTH-005: User notification of status:** Approved users shall receive a password-setting link via email. Rejected users shall be notified via email.
- **FR-AUTH-006: Invite secondary users:** Primary Member Users shall be able to invite colleagues to create Secondary Member User (contributor) accounts.

- **FR-AUTH-007: Secondary user invitation acceptance:** Invited colleagues shall receive an email with a unique link to set their password and activate their account without requiring internal approval.

3.2.2 The self-assessment module

- **FR-ASSESS-001: Assessment library dashboard:** The system shall display a dashboard listing all available assessments with their title, description, status ('Not Started', 'In Progress', 'Completed'), progress point, last completed category, and a recommended "re-assess by" date.
- **FR-ASSESS-002: Save assessment progress:** Users shall be able to save progress mid-assessment and resume later.
- **FR-ASSESS-003: Sectional assessment layout:** Assessments shall be broken down into logical, paginated sections for ease of use.
- **FR-ASSESS-004: Immediate results and recommendation display:** Upon submission, the system shall immediately display the user's results and auto-generated recommendations.
- **FR-ASSESS-005: Downloadable assessment report:** Users shall be able to download a PDF report of their completed assessment, including their submitted answers.

3.2.3 Member dashboard and action planning

- **FR-DASH-001: Add recommendation to action plan:** Each recommendation shall feature an "Add to Action Plan" button to convert it into a task.
- **FR-DASH-002: Action item properties:** Action items shall have editable properties: responsible person, due date, status, and private notes.
- **FR-DASH-003: Action plan Kanban view:** The action plan shall be presented as a visual Kanban-style board where users can drag and drop items to update their status.
- **FR-DASH-004: Attach files to action items:** Users shall be able to upload and attach files (PDF, DOCX, JPEG, etc.) to specific action items.
- **FR-DASH-005: Auto-link recommended resources:** When a recommendation with a resource link is added to the plan, that link shall be automatically included in the action item card.
- **FR-DASH-006: New recommendation notification:** When a consultant adds a note, a clear notification shall appear on the member's dashboard upon their next login.

3.2.4 Company data input and visualization

- **FR-DATA-001: Manual data entry form:** The system shall provide a simple form for users to manually input their OHS/HR metrics for a specific time period.
- **FR-DATA-002: Data import via file upload:** The system shall allow data import via a CSV/Excel file, providing a template and a mapping interface.

- **FR-DATA-003: Interactive trend graph:** The system shall feature a primary graph to plot metrics over time, with controls for users to toggle different data "layers" on and off.
- **FR-DATA-004: Visualizing interventions and impact:** The graph shall be able to display annotations corresponding to the completion dates of key Action Plan initiatives to help visualize impact.
- **FR-DATA-005: Data visualization interactivity and benchmarking**
  The system shall provide interactive, dynamic visualizations using a modern, accessible charting framework (e.g., Chart.js, D3.js, or equivalent). Users shall be able to filter datasets, hover for detailed tooltips, and annotate significant events (e.g., completion of major interventions). The visualization framework shall also support future functionality for anonymized benchmarking against peer organizations of similar size and sector.

3.2.5 The consultant backend portal

- **FR-CON-001: Consultant member dashboard:** The consultant dashboard shall list all member organizations, their latest activity, and the date of that activity. The list must be searchable and sortable.
- **FR-CON-002: Tabbed member detail view:** When a consultant selects a member, they shall see a read-only, tabbed view of that member's Profile, Assessments, Action Plan, and Data Dashboard.
- **FR-CON-003: Consultant recommendation interface:** A fifth tab, "Consultant Recommendations," shall allow consultants to add text comments, upload files, and recommend courses for the member.

3.2.6 The administrator backend portal

- **FR-ADMIN-001: Assign members to consultants:** The system shall provide an interface for Administrator Users to assign new member organizations to specific Consultant Users.

4. Technical environment and constraints

- **Website platform:** The Portal must be developed to integrate with our existing WordPress website, which uses the Oxygen page builder. Member-facing authentication and content (e.g., resources) will be managed through WordPress.
- **CRM Integration:** The solution must integrate with Microsoft Dynamics CRM for logging consultant interaction activities. Proposers should detail their recommended approach for this integration, including:
  - Whether their integration approach is real-time (API) or batch-based (data sync/export).
  - How they will handle authentication handoff between WordPress and the Portal.
  - How Dynamics logging will occur (direct entry, middleware, or webhook).

- **Security and compliance:** The Portal will handle sensitive organizational data. The solution **must be compliant with British Columbia's Personal Information Protection Act (PIPA).** All data must be securely stored and handled with strict access controls.
- **Hosting:** Proposers should include a recommended hosting solution that is secure, scalable, and located in Canada.

4.1 Non-functional requirements

- **Accessibility**: The Portal shall be compliant with Web Content Accessibility Guidelines (WCAG) 2.1 Level AA standards to ensure it is usable by people with a wide range of disabilities. Proposals **must** include a usability testing and accessibility validation plan as part of the design and QA process.
- **Performance**: All pages within the Portal shall load in under 3 seconds on a standard high-speed internet connection. Data processing and report generation shall be completed within 5 seconds.
- **Data visualization components:** Components must meet the performance and accessibility benchmarks described in FR-DATA-005, ensuring responsiveness and compliance across all supported devices.
- **Browser and device support**: The Portal shall be fully responsive and functional on the latest stable versions of major web browsers (Chrome, Firefox, Safari, Edge) on desktop, tablet, and mobile devices.
- **Scalability**: The system architecture shall be designed to support up to 300 active organizations and 1,000 total users initially, with the proven ability to scale to support our full member base of 900+ organizations in the future without significant architectural changes.

4.2 Security and hosting compliance

- **Canadian data centre** locations and provider (e.g., AWS Canada Central, Azure Canada East)
- **Encryption standards** (SSL/TLS, AES-256)
- **Disaster recovery plan and uptime SLA**
- **Data ownership** and right-to-audit clause

5. Project deliverables

5.1 Overview

DISCOVERY PHASE		
Deliverables	**Outputs**	**Acceptance Criteria**

☐ Kickoff meeting and requirements validation ☐ Stakeholder interviews (internal and member representatives) ☐ Finalized project charter and technical specifications ☐ User personas and role definitions (Member, Consultant, Administrator) ☐ Functional and non-functional requirements confirmation	☐ Discovery report and refined scope document ☐ Project plan with milestones and dependencies ☐ Design brief outlining UI/UX expectations	☐ All key stakeholders sign off on the discovery findings ☐ Technical and design requirements approved

DESIGN PHASE

Deliverables	Outputs	Acceptance Criteria
☐ Information architecture and user flow diagrams ☐ Wireframes for all core pages (dashboard, assessment, action plan, consultant view) ☐ Visual design mock-ups aligned with SafeCare BC brand ☐ Clickable prototype for a short usability test with 3-5 representative users ☐ Accessibility and usability checklist (WCAG 2.1 AA)	☐ Clickable prototype for usability testing ☐ Final design package (Figma or XD)	☐ User journey validated through at least one stakeholder workshop ☐ Design approved by Communications and IT team.

DEVELOPMENT PHASE

Deliverables	Outputs	Acceptance Criteria
☐ Backend setup (secure hosting, user roles, permissions) ☐ Integration with WordPress authentication and Dynamics CRM (for consultant logging) ☐ Development of key modules:	☐ Fully functional staging environment ☐ Weekly progress demos to SafeCare BC project team	☐ All modules pass internal QA and unit testing ☐ Integration tests confirm data flow between WordPress, CRM, and the portal

o Self-assessment tool and automated recommendation engine o Member dashboard and action planning system o Company data visualization (interactive graphs, benchmarking) o Consultant and administrator backend portals		
TESTING AND QUALITY ASSURANCE		
□ Comprehensive QA testing plan □ Accessibility audit (WCAG 2.1 AA verification) □ User acceptance testing (UAT) with member pilot group □ Security and penetration testing	□ Issue tracking log and resolution report □ UAT feedback summary	□ Zero high-severity bugs remaining □ Accessibility and security compliance verified □ UAT sign-off from SafeCare BC
LAUNCH AND TRAINING		
Deliverables	**Outputs**	**Acceptance Criteria**
□ Production deployment (hosting, data migration, configuration) □ □ Admin and consultant user training sessions □ Administrator documentation and technical manual □ Post-launch monitoring plan	□ Live portal URL and admin access provided □ Training materials (recordings, manuals, quick-reference guides)	□ Successful production deployment verified by SafeCare BC IT □ All training sessions completed and recorded
POST-LAUNCH SUPPORT AND MAINTENANCE		
Deliverables	**Outputs**	**Acceptance Criteria**

▫ 90-day post-launch warranty period with bug fixes ▫ Ongoing hosting and maintenance agreement (annual renewal) ▫ Monthly analytics and performance reports ▫ Optional enhancements roadmap for future phases	▫ Maintenance log and SLA tracking	▫ All warranty-period tickets resolved within agreed SLAs ▫ Performance metrics (uptime, load times) meet contractual thresholds

5.2 Milestone chart

Milestone Chart: OHS Self-Assessment and Action Planning Portal

Phase	Milestone	Target Completion	Key Deliverables	Approval / Sign-Off
1. Discovery	Project kickoff and stakeholder alignment	Week 2	Project charter, requirements validation, scope document	Project Owner (SafeCare BC)
2. Design	UI/UX wireframes and prototype approval	Week 6	Wireframes, user flows, accessibility checklist	Communications and IT Leads
3. Development (Sprint 1)	Core functionality (authentication, assessment module)	Week 12	Functional prototype with user registration and assessment logic	Internal QA Lead
4. Development (Sprint 2)	Action planning and data visualization modules	Week 18	Member dashboard, interactive graphs, benchmarking layer	Technical Advisor
5. Integration and Testing	CRM integration + UAT complete	Week 22	Integration reports, QA test results, accessibility verification. Accessibility testing to include automated (axe/WAVE) and manual keyboard navigation checks.	SafeCare BC Project Team

Phase	Milestone	Target Completion	Key Deliverables	Approval / Sign-Off
6. Launch Preparation	Production deployment readiness	Week 24	User training, admin manual, deployment checklist	Executive Director Approval
7. Launch	Public release of Portal	Week 25	Live system, go-live announcement, post-launch support plan	SafeCare BC Communications and IT
8. Post-Launch Support	Warranty and optimization phase	Week 38	90-day warranty report, performance metrics, enhancement roadmap	Project Sponsor

6. Questions for vendors

Vendors must address the following key questions in their proposal:

1. Describe your recommended architecture and technology stack.
2. How will your solution integrate securely with WordPress and Dynamics CRM?
3. What is your proposed approach to accessibility and usability testing?
4. How will you ensure data sovereignty and compliance with BC PIPA?
5. Provide examples of comparable projects, including at least one involving dashboard visualizations.

7. Proposal submission guidelines

Vendors are required to structure their proposals as follows:

1. **Company overview:** Provide a brief history of your company, its size, and its core services.
2. **Project understanding:** Demonstrate your understanding of SafeCare BC's objectives and the goals of this project.
3. **Technical approach and solution:** Detail your proposed architecture, technology stack, and methodology. Specifically address how you will meet the functional requirements and handle the WordPress and Dynamics integrations. Describe your proposed hosting solution.
4. **Project plan and timeline:** Provide a detailed project plan with major phases (e.g., Discovery, Design, Development, UAT, Launch), milestones, and estimated timelines. Please specify tangible outputs (e.g., wireframes, clickable prototypes, UAT checklist, admin training manual, post-launch QA report) for each major phase (Discovery, Design, Development, Testing, Launch).

5. **Project team:** Identify the key personnel who will be assigned to this project, including their roles and relevant experience.
6. **Past performance and references:** Provide at least three examples of similar projects you have completed, including client references.
7. **Detailed cost proposal:** Provide a comprehensive, itemized breakdown of all costs, including:
   - One-time costs for discovery, design, development, and implementation.
   - Separate costs for ongoing hosting, maintenance, and support (annual).
   - The hourly rates for all team members.
8. **Support and maintenance plan:** Describe your post-launch support and maintenance offerings. Include technical documentation (architecture, APIs, data schema), admin training for SafeCare BC staff, and source code repository access and ownership. All intellectual property (including source code, configuration, and documentation) developed under this project shall be owned exclusively by SafeCare BC upon payment and completion.

8. RFP timeline and key dates

- **RFP issued:** September 23, 2025
- **Deadline for vendor questions:** October 27, 2025
- **Answers to questions published:** November 7, 2025
- **Proposal submission deadline:** November 14, 2025 (5:00 PM PDT)
- **Vendor presentations (if required):** Week of November 17, 2025
- **Final vendor selection:** November 24, 2025
- **Project kick-off:** December 1, 2025

9. Evaluation criteria

Proposals will be evaluated based on the following criteria:

- **Understanding of the project (15%):** Demonstrated comprehension of SafeCare BC's goals and member needs.
- **Technical approach and proposed solution (30%):** The quality, feasibility, and suitability of the proposed technical solution and architecture.
- **Relevant experience and past performance (20%):** Proven track record with similar projects, especially those involving custom portals, data visualization, and CMS/CRM integration.
- **Project plan and team qualifications (15%):** The clarity of the project plan and the experience of the proposed team.
- **Cost-effectiveness (20%):** The overall value of the proposal, considering all one-time and recurring costs.

10. Confidentiality and disclaimer

All information contained within this RFP is confidential and intended solely for the use of the invited Vendors. SafeCare BC reserves the right to amend any part of this RFP, to reject any or all proposals, and to negotiate with any Vendor. This RFP is a request for proposals and does not commit SafeCare BC to award a contract or to pay any costs incurred in the preparation of a proposal. All intellectual property, concepts, and materials submitted by vendors as part of their proposals will remain the property of the vendor unless a contract is awarded, at which point all developed materials become the property of SafeCare BC.

11. Appendix A: Proposal evaluation matrix

This evaluation matrix provides a transparent and structured approach for assessing vendor submissions. Each proposal will be reviewed and scored by SafeCare BC's evaluation committee according to the weighted criteria below.

Category	Description and dimensions	Weight (%)
1. Understanding of the Project	Demonstrated comprehension of SafeCare BC's objectives, member context, and intended outcomes for the OHS Portal. • Demonstrates understanding of OHS in long-term and home health care. • Identifies key project challenges and mitigations. • Aligns with SafeCare BC's mission and values.	15
2. Technical Approach and Solution	Quality, feasibility, and suitability of the proposed architecture, tools, integrations, and hosting. • Integration plan for WordPress and Dynamics CRM. Security, PIPA compliance, and scalability. • Accessibility and performance considerations.	30

Category	Description and dimensions	Weight (%)
3. Relevant Experience and Past Performance	Proven success delivering comparable projects (portals, dashboards, or data tools). • Relevance of past work. • Client references and outcomes. • On-time, on-budget delivery record.	**20**
4. Project Plan and Team Qualifications	Clarity and realism of project schedule, staffing, and skill alignment. • Realistic timelines and milestones. • Qualified team roles and responsibilities. • Inclusion of UX, QA, and accessibility expertise.	**15**
5. Cost Effectiveness	Overall value for investment, considering the total cost of ownership. • Transparent cost breakdown (setup, hosting, maintenance). • Flexibility in support pricing. • Demonstrated long-term sustainability and value.	**20**

Scoring Key

Score	Definition	Description
5	Excellent	Exceeds all expectations and requirements; highly innovative and comprehensive.
4	Good	Meets all key requirements with added value or insight.
3	Satisfactory	Meets requirements adequately; minimal risk or innovation.
2	Fair	Partially meets requirements; lacks detail or introduces risk.
1	Poor	Fails to meet key requirements or lacks necessary clarity.
0	Non-Responsive	Criterion not addressed.

Total Scoring Table

Criterion	Weight (%)	Score (1–5)	Weighted Score (Weight × Score)
Understanding of the Project	15		
Technical Approach and Solution	30		
Relevant Experience and Past Performance	20		
Project Plan and Team Qualifications	15		
Cost Effectiveness	20		
Total	**100**		

Evaluation Notes

- Each evaluator completes this matrix independently.
- Weighted scores are averaged across evaluators.
- Vendors with the top two cumulative scores may be invited for a presentation and QandA.
- Final selection considers both quantitative scores and qualitative assessment outcomes.