

## **Expression of Interest (EOI): Technical Advisor**

### **1. About Construction Safety Nova Scotia (CSNS)**

- Construction Safety Nova Scotia is an industry founded and funded membership based not-for-profit association.
- We are focused on improving Occupational Health & Safety outcomes in the construction industry by providing OHS training, safety program certification and advisory services tailored to the needs of the industry.

### **2. Context and the Challenge**

- CSNS currently relies on a custom-built legacy database, as our core system to support member management, training delivery, COR audit management, and related services.
- We carry significant key-person risk regarding our dependency on this database, as only one individual is knowledgeable of its underlying design, processes, and scripts.
- We intend to replace with a solution(s) to replace our database, provide new Learning Management System (LMS) and Customer Relationship Management (CRM) capabilities.
- Our broader IT ecosystem currently includes modern platforms such as Acumatica for financial reporting and Microsoft 365.

### **3. Our Technology Philosophy**

We are deliberately avoiding heavy, "one-size-fits-all" enterprise resource planning systems. Our modernization strategy is grounded in a **"best-of-breed"** approach. We are seeking nimble, platform-agnostic, and mobile-friendly solutions that seamlessly integrate into our existing ecosystem without requiring a massive drain on internal resources to maintain.

### **4. Objective of this Engagement**

We are not looking for a massive, open-ended implementation contract. We are seeking a sharp, strategic Technical Advisor (Solutions Architect or Fractional CTO) for a short-term, highly focused engagement (estimated at a few days/hours of effort).

Your role will be to advise our leadership team and help us write the technical requirements/Statement of Work for our upcoming software procurement.

## 5. Anticipated Scope of Work (Agile Sprints)

The advisor will guide CSNS through short, agile sprints focused on the following deliverables:

- **Vision & Scope:** Clearly defining our functional requirements for Training, Auditing, and CRM, ensuring the target state remains user-centric and mobile-friendly.
- **System Decoupling:** Mapping out current dependencies so we can confidently decouple from the legacy system and mitigate our key-person risk.
- **Vendor Selection Strategy:** Developing a rigorous scoring rubric to vet future software providers based on their ability to integrate seamlessly with our existing tools, specifically Acumatica and the Microsoft 365 environment.

## 6. Desired Consultant Profile

- Demonstrated experience acting as a Fractional CTO, Solutions Architect, or senior technical advisor.
- Strong advocate for "best-of-breed" architecture, API integrations, and lean system design.
- Experience decoupling legacy, highly customized software platforms.
- Procurement expertise, specifically in drafting rigorous vendor scoring rubrics and technical requirements.

## 7. Submission Requirements

Please keep your response lean and punchy (no more than 3 pages). Submissions should include:

- A brief overview of your background and your philosophy on system architecture.
- 1-2 examples of similar advisory/scoping engagements.
- Your proposed hourly/daily rate or a flat fee for the scoping engagement described above.