
Alberta Insurance Council request for proposal

Exam revisions with psychometric support and analysis



Background

Established in 1989, the Alberta Insurance Council (AIC) is the industry-funded regulator responsible for licensing and overseeing insurance agents, brokers, and independent adjusters across Alberta. The AIC protects Alberta insurance consumers by ensuring they can rely on the competence, integrity, and professionalism of licensed insurance professionals.

The AIC is legislated by the *Insurance Act* and has delegated regulatory authority from the President of Treasury Board and Minister of Finance. As part of a regulated industry, insurance professionals must meet and fulfill strict license requirements to conduct insurance business to Albertans.

Mission: To protect the Alberta insurance consumer through the professional qualification, licensing, and regulation of insurance agents, brokers, and independent insurance adjusters.

Vision: We are the respected and trusted regulator of the insurance profession in Alberta.

Strategic Priorities (2026 – 2029 Strategic Plan):

- Advance risk-based regulatory approaches
- Build AIC's education function
- Enhance client-centric service delivery
- Demonstrate thought-leadership through impactful stakeholder engagement

What we do

The AIC protects Alberta consumers by ensuring they are served by industry professionals who meet the standards of competency, conduct, and continued professional development required of agents, brokers, and independent adjusters.

The AIC fulfills its mandate by:

- issuing and renewing Certificates of Authority;
- responding to inquiries and investigating consumer complaints;
- supporting the Industry Councils in their adjudicative role;
- developing and delivering licensing examinations;
- accrediting Continuing Education courses and delivery providers; and
- collaborating and working with industry and regulatory partners across Alberta and Canada.

The AIC develops the exams for General Insurance Levels 1, 2, and 3, as well as Independent Adjusters Level 1.



Project description

The AIC is looking to retain psychometric services to redevelop its high-stakes examination for General Insurance Level 1. There are currently four exam forms being utilized with 100 questions per exam. The examination is offered approximately 2500 times per year and leads to licensure of General Insurance Agents in Alberta.

Scope of work

- A. Blueprint development
 - Utilizing the current textbook, competency profiles, legislation and regulations, develop a defensible exam blueprint
- B. Item bank development
 - Review current exam questions for structure, defensibility, and currency
 - Recommend items to archive
 - Recommend the number of new questions required to enhance the item bank
- C. Item writing and review
 - Provide subject matter expert (SME) training
 - Review of structure and content of new questions
- D. Test form development
 - Recommend the number of exam forms and questions per form based on exam visibility
 - Develop forms based on exam blueprint
- E. Standard setting
 - Training SMEs on standard setting
 - Facilitate and complete standard setting for each exam form

Deliverables

The project deliverables include:

- Development of an exam blueprint for the General Level 1 exam considering the current textbook designed by the AIC along with legislation, regulation, and relevant national and interjurisdictional competency profiles.
- Support subject matter experts (SMEs) in the review of current exam questions and the development of new questions.
- Development of defensible exam questions based on textbook(s) and current legislation and regulations.

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- Development of new exam forms considering the number of exam writers and number of forms required to maintain security and integrity of the exam.
 - Establishing cut scores for each exam form using best practices in cut score methodology.
 - Establishing an exam form review calendar for the AIC to consider for future revisions considering current practices.
 - Completion of the project for implementation no later than April 1, 2027

Proposal requirements

Proposals need to include the following information so the AIC can make an informed decision on vendor suitability.

Vendor profile

- Legal name of the organization/psychometrician (if independent)
- Brief organizational history
- Business structure
- Office location
- Primary contact information
- Services offered related to assessment and exam development
- Team for the project and key personnel
- Statement of commitment to meet project timelines

Qualifications

Please provide the following:

- Curriculum vitae (CV) or biographies for the lead psychometrician and project team
- Academic qualifications for psychometricians on the project
- Any professional certifications
- An overview of relevant psychometric experience for:
 - Other professional regulatory bodies
 - Other professional associations
 - Other organizations requiring high-stakes exams
- Confirmation that the psychometricians are educated in industry standards including diversity, standard testing guidelines, fairness, and accessibility
- References from three recent clients for whom high-stakes exams were developed



Methodology and approach

Provide an outline of the plan to deliver psychometric services to meet the requirements of the project. This section should include:

- A description of methods and statistical techniques that will be used such as distractor and option analysis, standard setting methodology, item difficulty, and validity considerations
- Timelines and milestones
- Project deliverables and phases (if relevant), such as:
 - exam blueprint
 - exam forms
- Roles and responsibilities of individuals working on the project
- Approach to data governance and security along with a description of the platform used to develop exam questions
- Confidentiality processes
- Any internal quality assurance practices in the organization

Evaluation criteria

CRITERIA	WEIGHTING
Qualifications & Experience	35%
Methodology & Approach	20%
Work Plan & Project Management	20%
Cost Proposal	25%
Total	100%

The AIC may engage in an interview process to make the final selection.

Cost and pricing

Considering the scope of the project and timelines, and that cost of services provided by the organization/psychometrician is one of the criteria that will be used in selection, include a breakdown of costs for the services and pricing for each deliverable.

Timeline

The deadline for proposal submission is August 21, 2026. The AIC will then evaluate the proposals. During the evaluation phase, the AIC may reach out to ask clarifying questions of the vendor.



Submission instructions

Please submit your proposal in PDF format to Melanie Therrien, Head of Licensing & Education at mtherrien@abcouncil.ab.ca by August 21, 2026.

Legal matters

The AIC retains the right to reject any or all proposals, cancel the RFP, and is not required to select the lowest-cost bid.

This RFP does not represent a contractual agreement. A contractual agreement will be negotiated upon successful selection of the vendor. The agreement will be based on AIC's standard terms and conditions.

Contact information

If there are questions throughout the process, please email mtherrien@abcouncil.ab.ca by August 14, 2026. Melanie Therrien will not be available between August 3 – 14 and will respond to all questions submitted during that time on August 17th. Responses will be shared with all potential vendors.