

Occupational Therapy CORECOM Project

One Competency Document for Occupational Therapists in Canada

REQUEST FOR PROPOSALS

Project Management Services

The Association of Canadian Occupational Therapy Regulatory
Organizations (ACOTRO)

Solicitation Number: CORECOM - 001

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1. Project Overview

1.1 Leadership

The Association of Canadian Occupational Therapy Regulatory Organizations (ACOTRO), the Association of Canadian Occupational Therapy University Programs (ACOTUP) and the Canadian Association of Occupational Therapists (CAOT) form the Steering Committee that will govern the project. CORECOM is the name given to the project to reflect its focus on core competencies. The project is built on a solid foundation of collaborative relationships across the three national organizations and each organization possesses unique and relevant expertise to ensure a successful project outcome. Project funding has been secured and ACOTRO will serve as the primary contact for administration and funding purposes. See attachment A for more information about each organization.

1.2 Goal & Objectives

CORECOM is a two-year project - March 2019 to March 2021

Goal: To develop one competency document for occupational therapists in Canada that will outline entry to practice competencies and describe competencies expected throughout the practice career for occupational therapists.

Objectives:

- Create one set of competencies that are expected of Internationally Educated Occupational Therapists (IEOTs) and Canadian-educated Occupational Therapists, tested at entry to practice, and used by 14 universities to inform curricula, and all 10 regulators to develop standards and quality assurance programs;
- Advance a clear and fair process for IEOTs who currently have their credentials evaluated with one set of competencies and must pass the national entry level exam that was developed using a different set of competencies;
- Enhance the public's understanding of the competencies required of Occupational Therapists;
- Ensure consistent competency language and definitions to benefit members of the profession, their employers and the public;
- Avoid duplication of effort across organizations, maximize efficient use of time and resources; and
- Continue to enhance partnerships across the three national occupational therapy organizations.

1.3 Impetus & History

ACOTRO's Harmonization project established a framework and tools for assessing the substantial equivalence of an internationally-educated occupational therapist's educational qualifications and competencies as compared with those of Canadian-educated occupational therapists. In the course of that project, ACOTRO learned that a national education benchmark, a document that could describe the content covered in Canadian occupational therapy educational programs in order to support ACOTRO's tool development, did not exist. In fact, there are multiple documents in use by different occupational therapy organizations that reflect competence expectations of occupational therapists in Canada.

- The Essential Competencies of Practice for Occupational Therapists working in Canada (ACOTRO 1st to 3rd editions) was prepared for use by occupational therapists' regulatory authorities and is employed in a wide variety of uses such as: platform for practice guidelines, position statements, regulatory college programs such continuing competence, assessment of internationally-educated occupational therapists, re-entry and supervised practice. It was approved by all occupational therapists' regulatory authorities including Quebec who locally use another competency document and Alberta who also use a Standards of Practice document.
- The 2012 Profile of Practice of Occupational Therapists in Canada (CAOT) document reflects current evidence in the areas of competency and Canadian occupational therapy practice. The Profile presents a model of practice that includes a wide spectrum of competencies, some of which may be expected for occupational therapists at the beginning of their career, while others may be associated with more advanced levels of performance and experience. The current NOTCE examination blueprint and occupational therapy education program accreditation standards are based on CAOT's Profile of Practice and not on the Essential Competencies used by regulatory authorities.
- Référentiel de compétences lié à l'exercice de la profession d'ergothérapeute au Québec (OEQ 2010, Revised 2013) inventories the skills necessary to practice the profession of occupational therapy in Quebec.

CORECOM addresses the issue of multiple documents in use by different occupational therapy organizations that reflect competence expectations of occupational therapists in Canada. While the existing documents are similar, there is overlap and differences in how they are used as well as the approach taken and level of detail provided. This variance has duplicated effort and costs across organizations and created inconsistency and confusion about competency language, definitions and expectations. Moving to one competency document for occupational therapists in Canada is a substantive and important initiative.

1.4 Expected Results – Outcomes & Outputs

Outcomes

- Competencies and indicators that advance safe, effective occupational therapy from over 16,000 OTs across Canada;
- Improved labour market mobility of OTs via increased clarity, transparency and consistency in competencies expected throughout an occupation therapist's practice career;
- Enhanced fairness of existing credential assessment process for approximately 10% of OTs that are internationally-educated via one set of competencies for entry level examination and assessment of foreign qualification recognition processes;
- Commitment by leaders of the three national occupational therapy organizations to use the single competency document; and
- Increased public, employer, and practitioner understanding of the competencies required of OTs.

Outputs

- A competency conceptual framework with glossary of terms and concepts;
- A single national competency document with indicators;
- A user impact assessment that notes how regulators, academics, exam writers and accreditors view the competencies and future usability;
- A plan that engages stakeholders (including IEOTs) in the development and/or validation of the competencies;
- Signed statements noting national organization leaders' commitment to use competencies;
- An evaluation report noting achievement of key performance indicators;

- A communication plan; and a final report to the funder.

2. Scope of Services and Budget

The primary objective of this Request for Proposal (RFP) is to engage a person or team of persons to manage and coordinate project activities to achieve CORECOM's goal, objectives, outcomes and outputs. The Project Manager / Project Management Team will start April 2019 and end their services in March 2021. The funded project activities for Year One and Year Two are noted in Attachment B.

2.1 General Responsibilities

- a) Governance support including meeting logistics, meeting materials including Terms of Reference and summary notes for the Steering Committee and approved sub-committee meetings
- b) Project management activities including, developing and managing the project plan, managing the approved budget and project resources as approved by the Steering Committee, monitoring overall project progress and taking action where needed to meet funder and governance expectations
- c) Procurement management including RFP preparation & dissemination, respondent management, and Steering Committee support in selecting a vendor
- d) Vendor management including oversight of and integration of vendor project plan activities, timing and deliverables
- e) Risk management including identification of risks, implementation of risk strategies and risk escalation and reporting
- f) Stakeholder engagement and communication coordination support
- g) Report preparation to meet funder and governance requirements including evaluation
- h) Provide input and advice on project deliverables

2.2 Key Deliverables

- Project Management Office (PMO) set-up Plan
- Project Charter
- Project Plan
- Project Document Management Plan
- Risk Management Plan
- Procurement Plan
- Project Reporting Plan – Monthly & Quarterly & Final

2.3 Project Management Budget

The total budget allocated to project management services over the two-year period is \$ 70,000.
Project management invoices are to be submitted monthly for services rendered in the previous month.

3. Submission Requirements and Evaluation

3.1 Requirements

The submission must not exceed three (3) pages and address the following requirements; resumes can be included as an attachment.

- i. A cover page noting RFP Title and date of submission
- ii. An introductory section that outlines the respondent's understanding of the scope of project management services and approach to managing a project that spans two years.
- iii. A brief overview of the Respondent's organization
- iv. A description of similar roles or projects the Respondent has been involved with in the past with specific attention to those that were funded by the government and those that involved regulatory / professional licensing agencies in Canada
- v. Declaration of real or potential Conflict of Interest (COI) in responding to the RFP and/or in the provision of project management services. If a conflict is declared, the nature and scope of the conflict is to be outlined.
- vi. Resume(s) of person(s) to be involved in the delivery of project management services and a description of their proposed role and hourly or per-diem rate
- vii. Three references from organizations for which the Respondents have completed similar work in the past five years.
- viii. Date when Respondent can begin project management services
- ix. Respondent contact information

3.2 Deadline

Submissions are to be received no later than April 23, 2019 at 12 p.m. EST. (NOON)

- Submissions are to be sent by email to Andjelina Stanier at astanier@coto.org
- Questions regarding the RFP are to be sent in writing to astanier@coto.org. No questions will be answered within 48 hours of the submission deadline.
- It is the Respondent's responsibility to ensure their submission is received on time. A confirmation email will be sent to the Respondent when their submission is received.

3.3 Evaluation

Submissions will be evaluated on the following criteria. The basis for selection will be the highest combined rating of merit and per-diem rates. Decision will ideally be made on or before April 26th.

Criteria for Decisions

- Experience (relevance, recency)
- Proposed Approach (fit with project and needs)
- Value (Hourly rate, or team-based rate approach)
- Availability, (ability to start immediately, availability of high-quality personnel-team)
- Track record of past performance and delivery of needed services for projects of similar length.
- References (Quality and relevance)

3.4 Administration

ACOTRO is the primary contact for project administration and funding purposes. As the project administrator, ACOTRO reserves the right to:

- refuse all submissions received
- enter into negotiations with Respondents on any or all aspects of their submissions
- accept any submission in whole or in part without negotiations
- cancel and/or reissue this RFP at any time;
- seek clarification and verify any or all information provided with respect to this RFP; and
- negotiate with the sole compliant Respondent to ensure best value

4. Contact Information

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ATTACHMENT A – Overview of Leadership Organizations

ACOTRO

The Association of Canadian Occupational Therapy Regulatory Organizations (ACOTRO) has been working to promote cross-Canada collaboration, consistency, and innovation in occupational therapy regulation since its inception in 1989. All provincial occupational therapy regulatory organizations belong to and actively contribute to the activities of ACOTRO. In 2011, ACOTRO became a formally incorporated entity, further enhancing its organizational capacity and structure. ACOTRO has had recent experience with the federal government, specifically with ESDC and the Foreign Credential Recognition Program (FCRP) – the funders for the CORECOM project. Additional information about ACOTRO is available at www.acotro-acore.org.

ACOTUP

The Association of Canadian Occupational Therapy University Programs (ACOTUP) is the national organization of the 14 university programs in occupational therapy. It represents Canadian university occupational therapy programs through national and international organizations with similar goals and aims to achieve and uphold educational standards for the profession. ACOTUP promotes the generation of ideas, philosophies and research related to occupational therapy education. It is incorporated as a learned society of education programs. Additional information about ACOTUP is available at <https://www.acotup-acpue.ca/English>.

CAOT

The Canadian Association of Occupational Therapists (CAOT) is the national organization that supports the more than 16,000 occupational therapists who work or study in Canada. It was founded in 1926 and has a long-standing history of advancing products, services and learning opportunities that assist occupational therapists in achieving excellence in their professional practice. CAOT is also the sole accrediting agency in Canada which currently has the mandate through the regulatory bodies for the accreditation of all occupational therapy educational programs – it delegates this authority to the Academic Credentialing Council (ACC) which is responsible for establishing standards, evaluating programs, awarding accreditation status and monitoring quality of educational programs. And, CAOT also develops and administers the National Occupational Therapy Certification Examination (NOTCE) that assesses the written application of academic knowledge and professional behaviour of individuals entering the occupational therapy profession in Canada. In most provinces and territories, occupational therapists must take the NOTCE to meet regulatory registration requirements. In its leadership role in this project, CAOT brings expertise in accreditation and national examination / blueprint development and oversight. Additional information about CAOT is available at <http://caot.ca/site/www/howeare?nav=sidebar> .

ATTACHMENT B – FUNDED PROJECT ACTIVITIES

Year One Activities

- Convene National Tripartite Steering Committee meeting and schedule subsequent teleconference meetings to put project infrastructure in place, enact core functions and determine need for working groups;
 - *Stewardship* (governance policies and procedures including consensus-based decision framework, roles and responsibilities and the relationship between the Steering Committee and participating organizational Boards/Councils);
 - *Project Coordination* (confirm project charter and action plan including meeting schedule, administration and logistics, project activity coordination and reporting);
 - *Finance Management* (confirm final budget and in-kind contributions, open bank account, establish bookkeeping and budget reconciliation and funder reporting mechanisms);
 - *Engagement & Consultation* (identify stakeholders, establish principles for securing input, create engagement plan);
 - *Education & Communication* (establish on-line project presence, communication /education plan); and
 - *Competencies Development* (Agree to an initial conceptual framework, development & validation processes).
- Draft role descriptions and secure a project manager (or project team) and bookkeeper who will work together to support governance, project coordination, finance management, engagement & consultation, and communication & education activities as well as competency development/validation activities (as needed);
- Develop a Request for Proposal (RFP) to secure a competency expert (or experts) to guide and facilitate the competency development and validation process;
- Agree on approach for securing project human resources and selecting a French translation vendor; and
- Prepare initial quarterly project report for the funder and Steering Committee.
- Secure key project resources;
 - *Competency expert (s)* – identify possible vendors and send out invitations, review RFP responses, select preferred consultant/experts, validate references, secure signed service agreement/contract and establish start date;
 - *Evaluation expert/consultant* to design an evaluation including framework (evaluation questions, process and outcome measures, indicator selection), data collection plan (data sources, methodology, data capture), analysis plan (report template) and write the evaluation report;
 - *Communications expert/writer* capable of drafting relevant material for on-line posting and/or dissemination;
 - *Information Technology expert* for website and technology support;
 - *Lawyer* for overseeing legal issues/drafting contracts and agreements; and
 - *Vendor* for French translation services.
- Create Terms of Reference and establish Sub-Committee to address ongoing communication/education and general engagement. Each partner organization to nominate 1-2 members for Steering Committee's consideration;
- Draft a communication/education plan (identify internal and external stakeholders, target audiences, key messages, vehicles, frequency & format), establish on-line website presence (identify host site and requirements). Under Steering Committee direction, work with communications expert to draft initial communication/education;
- Draft an engagement/consultation plan by identifying key stakeholders (internationally educated and Canadian educated OTs, students, educators, accreditors, regulators, public and consumers, etc.) and outlining engagement continuum, and engagement/consultation strategies, and tactics;
- Hold monthly Steering Committee meetings via teleconference; and

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- Prepare quarterly project report for funder and Steering Committee.
- Secure signed contract with a competency expert and initiate activities;
- Refresh project plan and competency development / validation activities based on RFP results and competency expert(s) input;
- Compile reference material for competency development – existing competency documents as well as competencies from other professions, and secondary references such as NOTCE Blueprint, curriculum materials, relevant international documents, etc;
- Identify and select 7-10 Subject Matter Experts (SMEs) with input from competency expert(s) – Canadian educated and internationally educated OTs capable of representing different practice settings, roles, regions, patient populations, etc;
- Confirm SME involvement and schedule competency development sessions - number and type of sessions to be confirmed in consultation with Competency Expert(s);
- Establish an agreed upon competency framework to guide the development of competencies and ensure a shared understanding – purpose, assumptions, definitions, structure, and scope of competencies;
- Create website and post project communications in both French & English as per communication plan;
- Continue with education / communication and evaluation activities; and
- Prepare quarterly project reports for funder and Steering Committee.
- Secure Steering Committee direction regarding competency and indicator development;
- Host 1st competency development sessions with SME and competency expert(s);
- Obtain feedback on competency work from Steering Committee and partner organizations;
- Carry out targeted consultation and validation activities post Steering Committee input;
- Continue with education / communication and evaluation activities; and
- Prepare quarterly project reports for funder and Steering Committee.

Year Two Activities

- Host 2nd competency development sessions with SMEs and competency expert(s);
- Obtain feedback on competency work from Steering Committee and partner organizations;
- Carry out targeted consultation and validation activities post Steering Committee input;
- Continue with education / communication and evaluation activities; and
- Host 3rd competency development sessions with SMEs and competency expert(s);
- Draft proposed competencies and indicators for Steering Committee review;
- Revise competency document based on Steering Committee input;
- Continue with education / communication and evaluation activities; and
- Finalize competency document for consultation;
- Confirm engagement approach with input from competency expert(s) and partner organizations – anticipate educational webinar posted to website, national on-line survey open to all interested persons for 4-6 weeks and supplemented with select focus group teleconferences as needed to better understand survey results;
- Carry out validation / consultation activities - analyze and report on findings;
- Seek direction from Steering Committee regarding validation findings and next steps;
- Reconvene SMEs via teleconference to finalize competency document & indicators;
- Steering Committee members to seek governance approval from partner organizations for final competency document;
- Continue with education / communication and evaluation activities; and
- Prepare quarterly project reports for ESDC and Steering Committee.
- Conduct and report on implementation impact assessment pertaining to validated competency document for - Entry to Practice Exam; Education Benchmark & Curriculum Guidelines; Standards of Practice; Regulatory Quality Assurance Requirements; Accreditation Standards; and, SEAS (determines whether an internationally- educated occupational therapist's education and competencies are substantially equivalent to those of a Canadian-educated occupational therapist);

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- Complete a post evaluation report;
- Release competency document and complete communications;
- Secure written statement of commitment by partner organizations to implement the competency document by a pre-determined, agreed-upon date; and
- Provide a final report to the funder.