

**Occupational Therapy Compact
Executive Director
Request for Proposal**

<u>Job Title</u>	<u>Group</u>	<u>Date Posted</u>
Director, OT Compact Commission	OT COMPACT COMMISSION	
<u>Accountable to:</u> OT COMPACT COMMISSION/Chair/Executive Committee		<u>Authority</u> OT COMPACT Section 8.C (10) Bylaws Article IV, Section 1
<u>Job Summary:</u>		
Serves as the lead staff executive for the OT COMPACT COMMISSION, a joint government agency of member states. Directs the day-to-day operations of the organization, including but not limited to projects, relationships and staff. Works in concert with the Commission leadership, and its Executive Committee to fulfil the intent and purpose of the OT Compact.		
<u>Tasks</u>	<u>Principle Responsibilities</u>	<u>Frequency</u>
1	Manages the day-to day operations of the OT COMPACT. Provides support to the Commission Chair, Delegates, Committee Chairs and Executive Committee in the execution of its responsibilities, under the Compact Bylaws. Works in consultation with Commission Chair to develop meeting agendas, materials, minutes, and reports. Provides executive level staff support and ensures effective planning, promotion, and execution of commission meetings.	20%
2	Conducts outreach and public relations related to the OT COMPACT. Effectively manages external stakeholder relationships while representing the Commission. Serves as the OT COMPACT training officer; provides training to member state boards of occupational therapy. Facilitates the orientation of new Commissioners. Develops and maintains a repository of informational, educational, and training materials regarding the OT COMPACT. Provides external presentations and education and technical assistance for legislative enactments, as needed.	20%
3	Participates in the development and implementation of the OT Commission strategic plan and objectives. Collaborates with the Executive Committee in setting the overall strategic direction.	10%
4	In conjunction with the Commission and its committees, oversees and monitors regulatory compliance of member states with statute, bylaws, and rules.	15%
5	Responsible for supervising the staff and independent contractors of the Commission. Develops and submits to the Commission for consideration the administrative personnel policies governing the recruitment, hiring, management, compensation, and dismissal of Commission staff.	15%
6	In conjunction with the Treasurer and Executive Committee, responsible for managing the annual operating budget and reserves, and monitoring the Commissions financial performance. Maintains records of the Commission. May serve as Secretary to the Commission; coordinates Executive Committee elections.	20%
<u>Job Specifications</u> (Education, Certification, Special Knowledge and Skills)		
Bachelor's degree required, Master's or JD preferred. Background in business, management, healthcare administration or related field. Five or more years of member-based association management/governance and committee management experience preferred.		
Knowledge of occupational licensure, administrative law and operations management preferred.		
Excellent oral and written communication, presentation, technical, organizational, customer service, problem solving, analytical and critical thinking, and problem-solving skills are required.		

Ability to work independently to resolve member issues and collectively to establish a positive working rapport with members and stakeholders. Facilitates effective meetings with stakeholders. Domestic travel will be required.

Ability to build, maintain, communicate, and manage professional relationships with members, stakeholders, and public and governmental agencies, with an emphasis on political awareness, public perceptions, and OT COMPACT initiatives and details.

DRAFT

Occupational Therapy Licensure Compact Commission Support

Draft Request for Proposal for Secretariat

Proposal Title and Purpose:

Occupational Therapy Licensure Compact Commission Support

The purpose of this Request for Proposal (RFP) is to solicit a secretariat who will help commence, implement, and sustain the work of the Occupational Therapy Licensure Compact Commission (Commission).

Background/Entity Descriptions:

The American Occupational Therapy Association (AOTA) and the National Board for Certification in Occupational Therapy (NBCOT) are collaborating to create the [Occupational Therapy Licensure Compact](#). Work on this endeavor began in the summer of 2019, as The Council of State Governments (CSG) was contracted by AOTA to assist with the development of the compact. Since that time, AOTA, NBCOT, and CSG have worked closely with occupational therapy state regulatory boards and state associations to introduce compact legislation. As of June 2022, 21 states have approved the compact legislation, with a possibility of more states passing legislation before the end of 2022. The Occupational Therapy Compact Commission, a joint governmental agency composed of an elected representative from each state that passed compact legislation, will hold its inaugural meeting August 3 – 4, 2022.

Proposal Request Schedule:

The Occupational Therapy Licensure Compact Commission seeks proposals from a secretariat to provide administrative and management services to help implement the Commission's responsibilities and strategic initiatives and handle day-to-day operations. Below is information pertaining to AOTA, NBCOT, and CSG which may be useful for secretariats in assessing their ability to supply the desired services, infrastructure, resources, and preparing a proposal for consideration.

Deadline for proposal submission is xx/xx/2022.

Project Overview:

The AOTA NBCOT Joint Occupational Therapy Licensure Compact Initiative initially began in 2019. A national task force was created to bring representatives from the communities of professional practice, state regulation, state associations, employment, the United States Department of Defense, AOTA and NBCOT together. The purpose of this task force was to exchange experiences, ideas, concerns, expectations, and solutions from these various constituency perspectives. A sub-group of the national task force was then assembled to write and refine the draft Occupational Therapy Licensure Compact legislation which was then made available for public review and comment.

In addition to public stakeholders, significant input was obtained, once again, from occupational therapy state associations and state regulatory communities. All input solicited throughout the review process was carefully considered. Ultimately, approximately 15% of the draft bill was revised to incorporate the collective input received. The revised draft bill received final review and approval from the national task force. And from there, the bill was brought to the Boards of Directors for the AOTA and NBCOT for their review and approval in the fall of 2020. Upon approval from the leadership of both organizations, the bill was made available for introduction in state legislatures across the country beginning with 2021 state legislative sessions.

The bill stipulates a minimum of 10 states must approve the legislation before the Occupational Therapy Licensure Compact Commission can be assembled and begin its operations. Nine states approved the bill in 2021 and in the 2022 state legislative session, an additional 11 states approved the legislation.

Now that the minimum state requirement has been met, the Occupational Therapy Licensure Compact Commission is being formed with one state regulatory representative being appointed from each jurisdiction who has passed the legislation. In addition, AOTA and NBCOT will each have one ex-officio representative on the Commission.

The secretariat awarded this contract will be responsible for working with the Occupational Therapy Licensure Compact Commission, the commission's executive committee, and its executive director to develop all necessary commission infrastructure, secure a national licensure data system which includes licensure information and disciplinary actions, and implement management of all activities.

Terms of Contract:

The Occupational Therapy Licensure Compact Commission desires to enter into an agreement with the successful awardee for a period of three (3) years, with the option to renew in one-year increments for an additional three (3) years. **The anticipated commencement date is to be determined.**

Project Goals:

Work with the Occupational Therapy Licensure Compact Commission, its Executive Committee and other Committees, and its Executive Director to:

- Provide all necessary management infrastructure including appropriate staffing, technology, and resources as needed
- Convene meetings with Occupational Therapy Licensure Compact Commission as needed
- Prepare an annual budget
- Apply for grants
- Establish national policies and procedures
- Secure a national licensure data system (including disciplinary actions)
- Work with each occupational therapy state licensure board or state agency on the interface and implementation of the database
- Develop all initial reporting templates
- Develop all initial routine communication templates
- Prepare all initial public facing communications
- Process all occupational therapy practitioner requests for a compact to practice privilege
- Respond to all occupational therapy state licensure board administrators requests to confirm disciplinary action information
- Prepare data and reports, as needed

Nothing herein shall inappropriately delegate Commission responsibilities to the secretariat. The Commission shall approve all actions taken by the secretariat as determined by the Commission.

Scope of Work:

The scope of all expectations for assistance with the work outlined in this RFP must be completed as follows:

Convene meetings with Occupational Therapy Licensure Compact Commission as needed	Beginning 10/01/2022
Provide all necessary management infrastructure including appropriate staffing, technology, and resources as needed	Beginning 10/01/2022
Secure a national licensure data system	xx/xx/2022
Work with each OT state licensure board or state agency on interface and implementation of the database	xx/xx/2022
Prepare annual budget	xx/xx/2023
Apply for grants	xx/xx/2023
Establish national policies and procedures	xx/xx/2023
Develop all initial reporting templates	xx/xx/2023
Develop all initial routine communication templates	xx/xx/2023
Prepare all initial public facing communications	xx/xx/2023
Prepare and implement a marketing strategy and messaging to occupational therapy state regulatory boards who may be interested in the compact legislation	Beginning 01/02/2023 - Ongoing
Process all occupational therapy practitioner requests for a compact to practice privilege	Beginning 01/02/2024 - Ongoing
Respond to all occupational therapy state licensure board administrators requests to confirm disciplinary action information	Beginning 01/02/2024 - Ongoing
Prepare data and reports, as needed for the Occupational Therapy Licensure Compact Commission	Beginning 01/02/2024 - Ongoing

Dates are subject to change at the Compact Commission's discretion

Budget:

The Occupational Therapy Licensure Compact Commission's budget for calendar year 2023 will be approximately \$300,000 (\$150,000 each provided by AOTA and NBCOT). These monies will cover development and operational expenses with the understanding funding for the disciplinary action database is yet to be determined and will be provided separately. Calendar year budgets for 2024 and 2025 are anticipated to be appropriated by both the AOTA and NBCOT in the amount similar to 2023

How Can Current Roadblocks and Barriers be Removed:

Risks

- Insufficient management resources
- Database inefficiency
- Database security
- Insufficient start-up funding

Support of the Occupational Therapy Licensure Compact Commission and the necessary database is essential to ensure the success of the Occupational Therapy Licensure Compact. Secretariats can mediate these risks by thoroughly indicating methods to address these issues. An established system and process with past successes will be considered.

Proposal Requirements

A. Company Information

1. Provide the company name, address, telephone number, website, and any social media handles.
2. Provide the name, title, and email address of the individual who will serve as the company's primary contact.
3. Describe the company's history, ownership and affiliations.
4. Describe the mission and philosophy that distinguishes the company from competitors.

5. List the company's complete scope of services.
6. Describe the size of your company in employees and revenue.

B. Clients & References

7. Provide a list of the company's current clients in order of annual billings, length of time with the company, and the services provided.
8. Identify clients the company gained and lost during the last 12 months, describing why the company was selected or the relationship was severed.
9. List any current or past clients that are affiliated with AOTA, NBCOT and the occupational therapy profession.
10. Provide a minimum of three client references, ideally with prior experience of similar scope and magnitude to the services requested within this RFP. Include name, organization, phone number, email address, a brief description of the work completed on behalf of each client, and samples.

C. Relevant Experience & Strategic Approach

11. Provide a summary of the company's qualifications, experience, and competitive advantages in providing the services outlined in this RFP.

D. Project Management

12. Describe the company's approach to client relationships.
13. Provide detailed implementation plan for a contract awarded as a result of this RFP.

E. Staff & Partners

14. Provide a breakdown of the company's employees by function and location.
15. Provide a list of individuals who would service the OT Compact Commission's project if awarded, including staff responsibilities, locations, and brief bios.

F. Financial Proposal

16. Please bid your services for the *administration and management services* in one comprehensive amount with detailed costs for major components (such as the national licensure data system).

17. Describe the company's policy with regard to methods of compensation

Submission Requirements of the Proposal:

All proposals must be sent to the Occupational Therapy Licensure Compact Commission Chair by email no later than 11:59 PM Eastern on xx/xx/2022. Failure to adhere to the dates indicated below may result in bidder disqualification.

Request for Proposal released to vendors by Commission	xx/xx/2022
Intent to participate in RFP indicated by vendors	xx/xx/2022
Deadline for written questions or requests for clarification	xx/xx/2022
Response to questions and requests by Commission	xx/xx/2022
Deadline for proposal submission	xx/xx/2022
Evaluation of proposals by Commission	xx/xx/2022
*Commission vote to accept RFP and execution of contract by Commission	xx/xx/2022
*Awardee commencement of project	xx/xx/2022

*Subject to change at the Compact Commission's discretion

Evaluation Metrics and Criteria:

Once the secretariat has been selected, the following evaluation criteria will be used to assess the secretariat's performance:

Is the secretariat responding to requests/needs of the Occupational Therapy Licensure Compact Commission and its Executive Director in a timely manner?
Has the secretariat provided appropriate assistance to the Occupational Therapy Licensure Compact Commission and its Executive Director to complete national policy and procedural documents?
Has the Occupational Therapy Licensure Compact disciplinary action database been secured by the secretariat?
Have the implementation timelines established in the contract been adhered to by the secretariat?
Is the secretariat proactive in working with the Occupational Therapy Licensure Compact Commission and its Executive Director in addition to problem solving solutions to challenges?
In conjunction with the Occupational Therapy Licensure Compact Commission and its Executive Director, what kind of marketing initiatives has the secretariat implemented to further educate and work with other occupational therapy state licensure boards who may be interested in the compact legislative initiative?

Contact Information:

All questions and requests for clarification should be directed to the Chair of the Occupational Therapy Licensure Compact Commission, (Name of Chair)

Email: xxxx@xxxx

Phone: xxx-xxx-xxxx