



Occupational Therapy Licensure Compact Commission

Request for Proposals – Secretariat Services

Release Date: October 27, 2022

Closing Date: 5:00 p.m. ET on December 1, 2022

For additional information, please contact:

Isabel Eliassen
Interim Administrator, Occupational Therapy Licensure Compact
ieliassen@csg.org

Proposal Title

Occupational Therapy Licensure Compact Commission Support.

Proposal Purpose

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.

Project Overview

The Occupational Therapy Licensure Compact Commission seeks proposals for a secretariat to provide administrative and management services to help implement the Commission's responsibilities and strategic initiatives and handle day-to-day operations. The Occupational Therapy Licensure Compact Commission, a joint governmental agency composed of commissioners from each compact state, was established by the interstate compact's enactment in 10 states. The Occupational Therapy Licensure Compact was developed through a collaborative effort between The American Occupational Therapy Association (AOTA) and the National Board for Certification in Occupational Therapy (NBCOT). This endeavor began in the summer of 2019 when 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 October 2022, 22 states have approved the compact legislation.

Project History

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 assembled to write and refine the draft Occupational Therapy Licensure Compact legislation, which was made available for public review and comment.

In addition to public stakeholders, significant input was obtained 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. 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 13 states approved the legislation.

Now that the minimum state requirement has been met, the Occupational Therapy Licensure Compact Commission has officially been formed. One state regulatory representative was appointed from each jurisdiction who has passed the legislation. In addition, AOTA and NBCOT each have one ex-officio representative on the Commission. These commissioners met on August 3-4, 2022, to convene the inaugural meeting of the compact. Since then, the Executive Committee has held monthly meetings to continue the work of 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.

More information about the Occupational Therapy Licensure Compact, including governing documents, FAQs, and commission information, may be found at <https://otcompact.org/>.

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 years subject to successful performance evaluation as determined by evaluation metrics and criteria listed herein and dependent on continued funding. The commencement date for services is expected to occur by March 1, 2023.

Scope of Work

The Secretariat will report directly to the Compact Commission. At a future date, the Compact Commission will hire a Compact Executive Director who will also report directly to the Compact Commission and will work in collaboration with the Secretariat. The Secretariat position and Executive Director position will remain separate positions, separately reporting to the Compact Commission.

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

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

Budget

The Occupational Therapy Licensure Compact Commission's total budget for calendar year 2023 will be approximately \$300,000 (\$150,000 each provided by AOTA and NBCOT) to cover all operational expenses of the commission, secretariat, executive director, annual commission meeting and additional costs. Additional revenue will be needed to cover the development and operations of the national licensure database. The cost of the national licensure database is yet to be determined. Calendar year budgets for 2024 and 2025 are anticipated to be appropriated by both the AOTA and NBCOT in the amount similar to 2023.

Proposal Requirements

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 risks by thoroughly indicating methods to accomplish the defined scope of work. An established system and process with past successes will be considered. Proposals should include all of the following five sections, using the form provided at the end of the application:

- 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) Provide a response of up to 1,000 words which addresses:
 - a) Past work with similar projects.
 - b) Qualifications for this project.
 - c) An implementation plan for this project.
- 4) Please submit a cost proposal for only the cost to execute the administration and management services necessary to complete the scope of work contained herein. The cost to the commission for non-management related items will be separately budgeted and separately expensed to the commission. The cost proposal can include up to 250 words of justification and/or explanation for the proposed amount.
- 5) Provide three clients references, ideally with prior experience of similar scope and magnitude to the services requested within this RFP. Include name, organization, phone number, email address and a brief (100-word) description of the work completed on behalf of each client.

Proposal Deadline

All proposals must be sent to the Occupational Therapy Licensure Compact Commission Interim Administrator, Isabel Eliassen, by email no later than 5:00 p.m. Eastern on 12/01/2022, at the email address ieliassen@csg.org. Proposals must be in PDF form. Failure to do so will result in bidder disqualification.

Right to Reject Proposals

Proposals that are incomplete, exceed word counts, appear unrealistic, demonstrate a lack of technical competence or demonstrate a lack of comprehension of the complexity and risks involved may be rejected. The Commission, or those designated to carry out the work of the Commission, reserve the right to reject any or all proposals, to waive any informalities and/or minor irregularities and to award the contract in the manner it deems will carry out the best interests of the OT Compact Commission, with or without further discussion or negotiations.

No Liability of the Commission

The OT Compact Commission assumes no liability for any cost incurred by an applicant to prepare or deliver its proposal or for attending any meeting related to the RFP.

Use of Proposal for Evaluation

Responses to this RFP will be the primary source of information used to evaluate the applicants. Therefore, applicants are requested and advised to be as complete as possible. The Commission or those designated to carry out the work of the Commission may: 1) contact any applicant to clarify any response; 2) contact any references and current users of an applicant's services; 3) solicit information from any available source concerning any aspect of the proposal; and 4) seek and review any other information it deems pertinent to the evaluation process.

Evaluation Criteria

Proposals will be evaluated in their entirety. The evaluation will include consideration of:

- A. Responsiveness to the request for proposal.
- B. Functional and technical merits, including:
 1. Qualifications of applicant
 2. Prior experience
 3. Project work plan and timeline to complete the specific components of the scope of work
 4. Understanding of technical requirements
- C. Proposed method to accomplish the scope of work.
- D. Cost of Proposal

The order listed above is not necessarily an indication of the relative importance of these factors.

Application Timeline

Request for Proposal released to vendors by Commission	October 27, 2022
Deadline for written questions or requests for clarification	November 10, 2022
Deadline for proposal submission	December 1, 2022
Interviews Conducted	January 2-14, 2023
Evaluation of proposals by Commission	January 16-20, 2023
*Commission vote to accept RFP and execution of contract by Commission	January 30– February 3, 2023 (meeting date TBD)
*Awardee commencement of project	March 1, 2023

*Dates subject to change.

Evaluation Metrics and Criteria after Award

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 national licensure database been secured by the secretariat?

- Have the implementation timelines established in the contact 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 board who may be interested in the compact legislative initiative?

Contact Information

All questions and requests for clarification should be directed to the Interim Administrator of the Occupational Therapy Licensure Compact Commission, Isabel Eliassen. Contact her at jeliassen@csg.org.