Good morning. On behalf of the RFP working group, the advisory panel charged with overseeing this RFP project and process and the College of Occupational Therapists of British Columbia, I welcome you to this proponent teleconference. Thank you for attending and for participating in this meeting. The RFP opportunity we're discussing today is for the provision of tests and learning management software as a service for the COTBC quality assurance program, also known as the QAP. My name is Cindy Mclean, I'm the Deputy Registrar with the COTBC which we will refer to as the College and also the designated project lead for this RFP project. With me today are Mary Clark, the Director of Quality Assurance program and communications with the College and the subject matter expert and Janetta Ozard, the Manager of Office Operations and Finances. The three of us are the designated working group for this project and we'll each be speaking with you today.

Thank you for registering for this event. The purpose of this meeting is to provide proponents who are attending with an opportunity to ask questions and gather additional information about the request for proposal. The working group will also be sharing questions that have been forwarded to the College electronically and will be providing responses to these questions. As a meeting registrant you would have been provided with an agenda for this morning's meeting which hopefully will provide you with a sense of meeting process and flow. We're going to work methodically through the provided agenda, allowing time under sections four and five for your questions. Your questions will be answered by a member of a working group best able to respond at this time. If there are questions that the working group decides requires more mindful consideration, before providing a response these questions and the appropriate response will be posted on the College's website at a later time. This teleconference is being recorded. The recording will be transcribed and subsequently made available via the College's website. To ensure participants anonymity and to be respectful of the privacy of proprietary information, you are not required to provide your name, your firm's name or any other identifying information when asking a question. Please be aware that as this session is being taped and transcription will subsequently be posted on the website, anyone who wishes may be privy to the information contained on this recording. We will be stopping at set times throughout the agenda. Notably during agenda item number four, which is the section by section overview of the RFP, with a defined pause break leaving time for participants to ask questions you may have. In this spirit,

are there any questions or concerns at this time about any of the information that I've provided? Okay I hear a whole bunch of silence. It's interesting how silence can be heard.

Male Speaker: There are no questions.

Cindy: Okay no questions, thank you. So right now we're going to share some of the questions that we have received thus far with respect to the RFP. We received a question,

Is COTBC looking for one proponent or a proponent as a prime with potential subcontractors?

Mary: Hi this is Mary, as Cindy said I am the Director of the Quality Assurance program, so thank you for this question. I think that we're looking for an integrated system as much as possible, whether that can be delivered solely by the first proponent or with subcontractors, we would be willing to look at both. Obviously when you get into subcontractors the ownness would be on you to supervise that subcontractor and I think that is outlined in 2.1.1 of the RFP. So we have some flexibility that way basically.

Cindy: Great Mary, thank you for that response. Another query that we've received and I'll just share this with you, in order to be able to provide a complete response,

could you please indicate what your expected yearly volume of test delivery would be. For example, how many tests do you expect to deliver?

Mary: Okay this is Mary again. So because it's a quality assurance program, assessment is primary and we basically do assessment for learning. So every year we would be putting out about twenty-six hundred tests. Obviously our registrant base increases every year, so often by a hundred, hundred fifty each year, but you could suggest about twenty-six, twenty-five hundred to twenty-six hundred tests every single year for the annual continuing competence review. There are learning modules and the learning modules have a test component in them. But at this point the learning modules are not mandatory. So the volumes of those depend if people are preparing for the exam which happens every six years, that's when they tend to do the learning modules or

if they are required to do them for some other aspect of the College such as inquiry there might be a consent order where they have to complete a learning module. Then for the continuing competence exam, in two thousand and sixteen we had approximately eighteen hundred people that went through that, but there were retakes. People are allowed to do that exam more than once, so I would say approximately twenty-one hundred exams were put forward. Something else that might be of interest if you're looking at volume is that the current blueprint has four different practice context. So although we're testing competency and occupational therapy practice, we had in our blueprint four different, basically what we called practice sockets, and one was mental health, one was child and youth, one was physical health and one was neurological health. Basically some people would call that as having four different exams and then we had three forms for each of those for test security purposes. So I hope that gives you a little bit more detail in terms of the volume of what we were in our test bank and then the volume of what we deliver each year and then also how we might be compiling from our test bank into different form.

Cindy: Thank you Mary. We have received one additional question and I'll just read the question as it came to the College.

We would be willing to work with the psychometrician chosen by the COTBC, do you have one that is preferred? What are the current systems used to manage the quality assurance program and what format are data and files available out of those systems?

Mary: Okay, it's Mary again. We have a psychometrician that we worked with primarily for the continuing competence exam but that's not necessarily preferred, we're very happy with their services, but we're very flexible. She is not part of the RFP [selection process] for the very reason that she may have a bias, but we are willing to look at contracts where you would have an in-house psychometrician or if not we do have someone that is very capable and we've been happy with, so that's optional.

In terms of what are the current systems used to manage the QA program, I'm not a hundred percent sure what you mean by that, but I'm going to take a guess and hopefully the information won't be redundant from what's in the RFP and shed a bit more light. The quality assurance

program is, as much as possible, is web-based and run online. So the systems, the software systems that run it are web-based. We have a system that's for content creation and we have a system for test delivery. In terms of the results, the examinees or the test takers receive PDF's of the results of their annual continuing competency review and then for the exam it was criterion based so they got a pass or fail. That data was then put into our registrant database as an Excel file that is uploaded. So our registrant database and exam system, or our assessment system aren't connected at this point. So but format and data files are available out of those systems. At this point in time, we can request data that comes as Excel or CSV or whatever from our current provider and depending on the assessment and whether the College sees those results that's then how we receive the data differs. So for the annual continuing competency review, the College does not see any individual results, we just see aggregate results and so that all has to be redacted so the format of that file obviously is different than the exam results that we do see.

Cindy: Okay thank you very much Mary for working our way through those questions. We wanted to present the questions to those of you who are on the call because we felt that maybe by sharing the questions that we have had come in thus far may take care of some of your questions or also facilitate some additional questions from you folks. So that was the rationale for sharing those questions at this time. I think the next thing that we would like to do is give an overview of the RFP and Janetta is going to do that for us, but I mean an overview, she will literally walk us through each section of the RFP. She is not going to repeat what is in the RFP, but she will just lead us section by section. So if you have any questions that pertain to any of those individual sections, this would be the time to ask them at that pause break that Jannetta will provide after each one of those sections. Your questions may be answered by any one of us on the working group, so be prepared again to hear different voices in terms of your answerers or your responders. Okay Jannetta, please.

Janetta: Hi this is Janetta speaking. If you can't hear me let me know. I will try to speak clearly. So to begin with we provided summaries opportunities. It's basically a brief overview of the College's mandate, the quality assurance program and the reason for issuing the RFP. So are there any questions about this particular section?

Male: No, nothing.

Janetta: Okay, the RFP process rules, this is basically all the rules for the RFP process including how it's going to be submitted, subcontractors, the duration, basically all the legal ins and outs of the process. Any questions about this section?

Male: Also no.

Janetta: Okay, thank you. The next section is situation overview. This provides more information on the quality assurance program, including the program elements which are competence maintenance, competence assessments and improvement. So it is basically providing you with more detail on how the program rolls out for the College. Again any questions?

Male: No.

Janetta: And so scope, we're basically drilling down, provides further details how the actual softwares and service would be employed in meeting the three elements of the QA program, assessment, maintenance and improvements. Any questions?

Male: So I'm just scrolling through this. Is it scope five or section 5?

Janetta: Four I believe on page nine.

Male: Okay, so four, okay no questions.

Janetta: Term is basically as stated, the anticipated term of the contract. Any questions?

Male: No.

Janetta: So requirement is the major bulk of the RFP and so there are four major sections. There is strength and qualifications. So this is basically where proponents get to tell the College about their company and how it could meet the needs of the College. The next section is approach

which provides the main elements required for the services and that is supported by Appendix B which basically provides item-by-item detail of the kinds of services we're looking for broken down as far as we can break them. This section also asks for proponents to provide information regarding their project management skills, implementation services, service support, maintenance and training. The next part of the requirement section is timeline, which is where we are asking for all the major project milestones so we can have an idea of how you actually deploy this over time. Then finally the price. We are looking to be provided with all costs including any development costs, who will bear them, software, third party licenses, everything, that's the scope of the price that we're looking for. Are there any questions about this section?

Male: Yeah I have a number of questions here. In six-point two point one, point one, booking and logging process, are you also looking for a remote solution integrated with the E-assessment form or?

Mary: At this point we haven't used the remote proctoring. It is something that we would consider. In the first exam administration individuals would go to take the exam at test centers throughout the Province of BC where there may be a proctor available there or they were also able to have their own proctor that is registered with the College so that they could do the exam in the comfort of their homes. So we haven't used remote proctoring to date, but we wouldn't necessarily take it out of the picture either.

Male: ***So we could offer [remote proctoring] as another or an add on?***

Mary: That's right.

Janetta: Absolutely. Absolutely, yes.

Male: Okay good, good. And the second point is the one below, so you're talking about content and you have an existing system, will there be some migration work that needs to be done there or?

Mary: Yes.

Male: To import the content from the previous system?

Mary: That's right. So I believe in the Appendix there was an item there where it talks about the ability to upload content. We would anticipate that that would be needed because we do have an existing item bank.

Male: *Yeah, the reason why I am asking is that it's quite difficult to give a good price estimate on migration until you have seen the quality of the exported file. Sometimes it can be a drama that can be really difficult to interpret the export file that you get and other times it's just normal QTI and it just works almost out of the box. Do you know if this content is IMS QTI compatible?*

Mary: No, we don't have that information at this point. So what I would suggest is Cindy, Janetta and I can talk a little bit about that and post a response in that way because I certainly understand that to be able to quote on that is difficult and that's different than just uploading an Excel file or a Word file that we might create ourselves. So Janetta is writing and we'll have a look at that and have a better response and that would be posted on the website.

Male: Okay. Thank you. I think that's all for the function of service requirements from this.

Mary: Thank you.

Cindy: Any other questions on that section that Janetta just walked us through?

Female: I did have a question. *So does COTBC require a vendor to be able to provide a test center network or do you currently have your own location and just need the technology within those locations for the delivery of the assessment component?*

Mary: So all of our test takers are usually located in BC, we might have a couple of international ones but we've used the test centers, the list that is set up by Athabasca University, so the test centers through the Province of BC are usually in existing post-secondary institutions like BCIT

or Simon Frasier University or they are in libraries, community colleges, things like that. So that's where we would expect our registrants to go to.

Female: Okay, thank you. Then sorry a brief follow-up question, *so are the delivery of those exams in kind of the scheduled same windows or are these exams on demand?*

Mary: So at this point in time they are within a scheduled window of time and the individual's book, they did in the last administration they did have an option. They had three choices where they could write the exam, whether we'll continue with that exactly, give them that many choices this next time, we're not sure.

Female: Okay, thank you.

Mary: Sorry Janetta just pointed to me, the annual continuing competence review, that's not a proctored exam. The only exam that is proctored is the continuing competence exam. So the ACCR, the short form of that or the acronym for that they write in the comfort of their workplace or their home.

Male: One of the things that you mentioned going over this particular section was Appendix B, I have a specific question in regard to why that and Appendix A, concerning the step-over requirements. *Would your College be open for us using AWS to meet those requirements?*

Janetta: Sorry can you repeat your question?

Male: So in the step of requirements it mentions that the personal information is stored access used and disclosed inside Canada only, we are a US based company and we have worked with other clients up in Canada, whether it was in Alberta, BC, whichever Province we were in, *we usually made sure that we met those requirements using an AWS system allowing us to put everything remotely up on their server to meet a lot of international clients' need. Would your data be opposed to that? In that section it mentions exceptions, so I didn't know if that would meet those requirements using AWS system to meet that?*

Mary: That would meet the requirement. Yes.

Male: That would work?

Janetta: That would work.

Male: Just double checking. Thank you.

Janetta: Good question, thank you.

Janetta: Are there any other questions for this part? Okay so we're at section seven which is proposal format. What we've done is we've set up a response from using simple survey, so all our fees are to come in through that form. It essentially replicates the section we just went over and provides you with the opportunity to answer all those questions and where needed upload documents. Are there any questions about that?

Male: No.

Janetta: Moving on to evaluation, so it basically outlines who will be doing the evaluation, evaluating the mandatory and the weighted criteria, basic use and demonstration and then the final evaluation. So it basically goes through the process of how proponents' proposals will be evaluated by the RFP panel. So they are not just evaluated by the working group, it is by the panel and how that process will be done. Are there questions about this?

Male: No.

Janetta: Were there any more questions about the SISA assessment form? And Appendix B, which is all of the detail of the function and requirements or questions about Appendix B? Okay hearing none and then the final part is, oh sorry, yes?

Male: No, no, it's okay.

Janetta: Are you sure?

Male: No questions.

Janetta: And then schedule A is basically is more about privacy protection rather than it's different than the attestation form. It's just basically the outline, the legalism about it. That is the proposal. So I'll pass it back to you Miss Cindy.

Cindy: I think there are two other elements, one being the interviews and the demonstrations which is eight point three. Any queries with respect to eight point three, the interviews and the demonstrations? Okay hearing none,

Male: *Yeah just one question.* ==*Can the demonstration) be done remotely or?*==

Janetta: Yes definitely. Absolutely.

Cindy: Any other queries under eight point three, interviews and demonstration? Then on to eight point four, the final evaluation. Okay, I think we've done our overview run through and Jeannetta very briefly touched on Appendix A, the assessment form. Any additional questions with respect to that assessment form? Appendix B, function and service requirements. We've touched on that one as well. The privacy protection we've also touched on that. So that is in essence the actual proposal and also we have spoken to the online submission required for that proposal. I now would like to open it up to any questions from the floor that we have not addressed or that you may still be wondering about. In terms of timing, it's ten thirty, we have indicated that we would keep the lines open until eleven thirty, so we have time remaining but I do not wish to take up people's valuable time if we have addressed all of your questions. So please if there is any other outstanding questions, please raise them now.

Male: *One question,* ==*do you have a specific budget in mind or do you have an upper limit?*==

Cindy: You know that's a good question and thank you for asking it. I will share with you that this was an element that received some very animated discussion at our advisory panel meeting

and the RFP purposely does not speak to a budget amount because we wanted you, the experts, in this area, the proponents, to sharpen your pencils and to present for our consideration your best price for the expertise and the resources that you feel are required to meet the needs of the College as we have presented in the RFP.

Male: Okay.

Cindy: Okay?

Male: Yes, fair.

Cindy: Thank you. That may not be the definitive response that you wanted, but that's where we have landed on that important element of budget and price.

Male: Okay, thank you.

Cindy: Any other additional queries?

Female: *I did have a question, I was wondering if you could share what your current item banking technology is and if you will still be moving forward with that technology or if you were looking for it to be possibly in with new technology that would be bid in the [inaudible 0:35:23]?*

Mary: It's Mary speaking. I can share a little bit, but that's proprietary, so I have to be careful with that. The case creation system allows for both writers and reviewers, so there are two roles there and individuals who are our case or item writers are able to create spaces and our approach is a key features approach so they are able to note their cases and their questions and the correctness of those answers and reviewers are able to look at those. There also is a tagging and blueprint process there.

Cindy: Thank you for that response Mary. Any other questions from anyone on the call? Again the silence is golden. Go ahead.

Male: It's all clear for me at least. Thank you.

Cindy: Okay. I was just going to say the silence is either golden if you want a quick wrap up or it's, I really hope that folks are not feeling too much reluctance to ask your questions because this is the opportunity.

Male: *Maybe one question following there will be announced a second questioning round?*

Mary: It's Mary speaking. I think that there may be another round of questions particularly if some individuals may not have known of the RFP or you may have further questions as you look at it. We didn't say that in our RFP necessarily, but I think in fairness so that the RFP's are as detailed and meaningful as possible, we would entertain that. But our goal in having the proponents meeting maybe I should let Cindy take over on this, but it is to make sure that whatever additional information is gleaned from questions that everybody has that information who might be putting forward an RFP.

Cindy: I think what Mary has alluded to is the potential best format for us to address any additional questions that may come in and I think that that very good question needs to be left with the working group in terms of how many additional questions we are presented with, whether those can be answered on the website such as the question that we indicated we would do some further work or whether it's necessary to offer another opportunity like this one. So I'm going to ask one more time, I feel like I'm a bit like raising the gavel at an auction here. Any more additional questions coming forward at this time?

Male: No it's fine, thank you.

Cindy: Okay. Well again thank you very much for attending, for participating, and for considering this request for proposal opportunity. Any addendums such as a more fulsome answer to the query that was posed earlier this morning, will be posted on the College website. Just a reminder, online submissions using the online form and format that is noted in the RFP must be received by the College before two p.m. pacific time on January fifteenth twenty

nineteen. So at this time I'm going to close the teleconference with a wish for a happy holiday upcoming and good wishes for twenty nineteen. Thank you.