



Canadian Alliance of Regulatory Bodies of Traditional
Chinese Medicine Practitioners and Acupuncturists

REQUEST FOR PROPOSALS

Psychometric Services

Issued by:

Canadian Alliance of Regulatory Bodies of
Traditional Chinese Medicine
Practitioners and Acupuncturists
900, 200 Granville Street
Vancouver, BC, V6C 1S4
<https://carb-tcmpa.org>

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TABLE OF CONTENTS

- 1. About CARB-TCMPA3
- 2. The Pan-Canadian Examinations3
- 3. PCE Program Activities.....4
- 4. Primary Purpose6
- 5. Term of Contract7
- 6. Inquiries and Submission of Proposal7
- 7. Key Dates7
- 8. Respondent Qualifications7
- 9. Service Requirements8
- 10. Budget.....9
- 12. Proposal Contents and Format of the Response9
- 13. Basis of Awarding the Contract.....10
- 14. Respondent Confidentiality.....11
- 15. Client Confidentiality.....11
- 16. Intellectual Property11
- 17. Accuracy of Information12
- 18. Termination of Contract12
- 19. Acceptance of Provisions.....12

1. ABOUT CARB-TCMPA

The Canadian Alliance of Regulatory Bodies of Traditional Chinese Medicine Practitioners and Acupuncturists (CARB-TCMPA) is the national forum and voice of provincial regulatory authorities that are established by their respective provincial legislation. The founding members comprise the regulatory bodies of Traditional Chinese Medicine Practitioners and Acupuncturists (TCM/A) of British Columbia, Alberta, Ontario, Quebec, and Newfoundland and Labrador.

CARB-TCMPA's members govern individuals who practice Traditional Chinese Medicine and Acupuncture and use the titles authorized by provincial legislation to ensure that patients receive safe, quality, and ethical health care services. Through collaborative activities, CARB-TCMPA promotes quality practice and labour mobility across Canada. We serve as a resource to members, governments, and the public. We work collaboratively on identified issues and act on opportunities that could have an impact on the regulation, quality, education, and training of TCM professionals to ensure public protection. Its primary activities include developing and administering a national examination program for admission to the profession.

2. THE PAN-CANADIAN EXAMINATIONS

The Pan-Canadian Examinations (PCE) assess occupational competencies of entry-level Traditional Chinese Medicine professionals and Acupuncturists that are required for safe, competent, and ethical practice as outlined in the *Entry-Level Occupational Competencies for the Practice of Traditional Chinese Medicine in Canada* (2018). The purpose of the PCE Program is to assist the regulatory bodies in determining minimum entry-level competency for practice as a TCM Practitioner, Acupuncturist, and/or TCM Herbalist.

Successful completion of the PCE is required for registration as an Acupuncturist, TCM Herbalist, or TCM Practitioner along with any other registration requirements imposed by the participating regulatory bodies in Canada. Registration requirements vary from province to province; in general, they include completion of a post-secondary program of study in Acupuncture or as a TCM Herbalist, and/or TCM Practitioner, and relevant clinical experience under the supervision of a qualified professional.

The PCE Program includes three core examinations:

1. Pan-Canadian Entry-level Examinations for Acupuncturists (the "Acupuncturists Examination"; Acupuncturists),

2. Pan-Canadian Entry-level Examinations for TCM Herbalists (the “TCM Herbalists Examination”; TCM-H), and
3. Pan-Canadian Entry-level Examinations for TCM Practitioners (the “TCM Practitioners Examination”; TCM-P).

As outlined in the PCE Blueprint, each examination (Acupuncturists, TCM-H, and TCM-P) consists of two parts: a multiple-choice question (MCQ) component that includes independent multiple-choice questions and a clinical case question (CCQ) component that includes case-based multiple-choice and multiple-select questions. A candidate’s total score is derived from the combined performance on the MCQ and CCQ components, of which each component is worth 50% of their total score.

The PCE are delivered twice annually in April and October. Examination windows are booked in advance and allow two days per exam for the MCQ and CCQ components. The examinations were originally administered in a paper-based format. From October 2020 to April 2023, examinations were delivered virtually through online proctoring. Starting with the October 2023 administration, the examinations will be delivered at secure in-person testing centers.

The PCE are also offered in Traditional Chinese and Simplified Chinese for those jurisdictions that wish to make the translated exams available to their candidates.

Additional information about the examinations is available on the CARB-TCMPA website:

- [About the PCE](#)
- [Results of past administrations of the PCE](#)
- [The PCE Candidate Handbook](#)

3. PCE PROGRAM ACTIVITIES

The PCE Program follows a rigorous process for development and administration using an evidence-based approach that adheres to professional guidelines for establishing a test’s reliability and validity. Steps in the process include careful examination construction, appropriate selection of content experts, data cleaning and integrity checks, item analysis, validation, defensible pass mark derivation, accurate scoring and reporting, and application of appropriate security measures.

The examination forms are constructed to align to the PCE Blueprint, which is approved by the PCE Steering Committee. For all three disciplines, the examinations align to the blueprint parameters in terms of practice area and cognitive level.

CARB-TCMPA contracts with external vendors to support development, administration, and delivery of the PCE and works closely with TCM/A regulatory bodies to manage the registration of candidates for the examinations.

The following summarizes current roles and responsibilities in relation to the PCE Program:

Board of Directors

The CARB-TCMPA Board of Directors approves the competency profile for the profession, approves the terms of reference for all committees, and appoints representatives to the PCE Steering Committee.

PCE Steering Committee

The PCE Steering Committee oversees the PCE Program, subject to budget approval and regular reporting on its activities to the Board of Directors. The Steering Committee approves appointments to the Examinations Committee, Chinese Examinations Committee, and Appeals and Accommodations Committee, and is responsible for blueprint approval, pass mark approval, and candidate handbook approval. The Steering Committee also makes recommendations on the PCE Program, competency profile, and committee terms of reference to the Board of Directors.

Examination Committees

The Examinations Committee and Chinese Examinations Committee are comprised of subject matter experts. The Examinations Committee contributes to blueprint development, pass mark review, candidate handbook review, item review, and competency profile review. The Examinations Committee also approves each exam form. The Chinese Examinations Committee supports the translation of the examinations into Traditional Chinese and Simplified Chinese.

Appeals and Accommodation Committee

The Appeals and Accommodations Committee reviews special accommodation applications and requests for nullification of examination results based on illness, personal emergency, or procedural irregularities.

Executive Director

CARB-TCMPA's Executive Director works with the Board of Directors and PCE Steering Committee to support their activities. The Executive Director also oversees agreements with external vendors, supports stakeholder engagement and

communication activities, and will work closely with the Examinations Director to monitor and report on program outcomes.

Examinations Director

CARB-TCMPA's Examinations Director will work with external vendors to coordinate development, administration, and delivery activities, recruit subject matter experts, support committee meetings, manage translation requirements, maintain open channels of communication with all parties, and ensure completion and distribution of deliverables as appropriate. *Note: CARB-TCMPA is growing. This is a new position expected to be in place prior to the April 2024 administration of the examinations.*

Regulatory Body Staff

Regulatory body staff play a key role in the administration of the PCE Program by managing candidate registration and collection of examination fees. CARB-TCMPA liaises with regulatory body staff via an informal administrative working group.

Examination Administration Vendor

CARB-TCMPA works with an external vendor to administer the PCE, with services provided as outlined in this RFP.

Examination Delivery Vendor

CARB-TCMPA works with an external vendor to deliver the PCE at computer-based testing centers. CARB-TCMPA also uses the vendor's software for the management of the examination item banks, exam forms, and exam delivery.

Examination Development Vendor

CARB-TCMPA works with external vendors to support periodic exam development activities, such as competency profile and blueprint review.

4. PRIMARY PURPOSE

This document constitutes a Request for Proposal (RFP) by the Board of Directors of CARB-TCMPA. The primary purpose of this RFP process is to select a psychometric/assessment firm to provide examination administration services for CARB-TCMPA for the best overall value in terms of experience, quality, and price.

5. TERM OF CONTRACT

The anticipated term of the contract is a three-year (3) term commencing with administration activities for the April 2024 Pan-Canadian Examinations (as outlined in s. 9) and running to administration activities for the April 2027 Pan-Canadian Examinations. The contract expiry date will be July 31, 2027.

6. INQUIRIES AND SUBMISSION OF PROPOSAL

Any inquiries regarding this RFP and submission of proposals should be directed to:

Jennifer Bertrand
Executive Director
CARB-TCMPA
Email: jennifer@carb-tcmpa.org
Phone: 825-901-0618

Please submit your proposal by **5:00 pm EST on October 20, 2023**. All submitted proposals will become the property of CARB-TCMPA and will not be returned to the respondents. Late proposals will not be considered. Proposals must be submitted in English.

CARB-TCMPA will not be liable for any costs incurred by the respondents in the preparation and/or presentation of their response to this RFP. By submitting a proposal, the respondent authorizes the collection of information by CARB-TCMPA as outlined in s. 13.

CARB-TCMPA expects to notify the successful respondent following a Board of Director's meeting on **December 8, 2023**.

7. KEY DATES

| | |
|--|------------------------------|
| RFP Issued | September 18, 2023 |
| Deadline to Submit Questions | September 25, 2023 17:00 EST |
| Deadline to Email re: Intent to Submit | September 26, 2023 17:00 EST |
| Deadline to Submit Proposals | October 20, 2023 17:00 EST |
| Anticipated Notice to Award Contract | December 11, 2023 |
| Anticipated Contract Start Date* | April 1, 2024 |

*Contract start date may be adjusted following discussion with the successful respondent regarding scheduling of activities.

8. RESPONDENT QUALIFICATIONS

The minimum requirement for initial consideration as a candidate under this RFP includes being a psychometric/assessment firm experienced and knowledgeable in the administration of high-stakes examinations used for professional licensure.

Additional qualifications that would be considered an asset include demonstrating knowledge of the health regulation landscape in Canada and the Traditional Chinese Medicine and Acupuncture (TCM/A) profession in Canada, experience working with diverse stakeholder groups at the provincial and/or national level, and experience with the administration of multilingual high-stakes examinations.

CARB-TCMPA welcomes all qualified respondents to submit without regard to race, national or ethnic origin, colour, religion, age, sex, sexual orientation, gender identity or expression, disability, and other protected grounds under human rights legislation.

9. SERVICE REQUIREMENTS

CARB-TCMPA's current psychometric services vendor is contracted to complete administrative activities up to and including the approval of examination forms for the April 2024 administration of the Acupuncturists, TCM-H, and TCM-P Examinations.

The services required by CARB-TCMPA include the following:

- 1) Provision of post-examination delivery analysis, validation, equating, pass mark approval, and scoring activities starting with the April 2024 administration of the Acupuncturists, TCM-H, and TCM-P Examinations:
 - a) Score the examinations using a rigorous quality assurance process to ensure the defensibility and reliability of the results.
 - b) Provide candidate results data, performance reports for failing candidates, provincial and national statistics, school statistics, and a technical report for the administration.

- 2) Provision of pre-examination delivery activities for each examination starting with the October 2024 administration of the Acupuncturists, TCM-H, and TCM-P Examinations:
 - a) Assemble and validate examination forms to ensure alignment with the examination blueprint and overall quality assurance.
 - b) Support preparation of exam forms for delivery of translated versions of the examinations including analysis and validation.

- 3) Provision of recommendations for streamlining our current approach to administration and building our item bank for the Acupuncturists, TCM-H, and TCM-P Examinations in a manner that optimizes efficiency, improves cost effectiveness, ensures the security of examination content, and supports CARB-TCMPA to build internal capacity for examination administration.

10. BUDGET

The budget allocated for the provision of psychometric services for the CARB-TCMPA examination program is \$185,000 for fiscal year 2024/25. This includes two administrations of the Acupuncturists, TCM-H, and TCM-P examinations in April and October. CARB-TCMPA may accept submission of proposals that fall outside of this budget.

11. PROPOSAL CONTENTS AND FORMAT OF THE RESPONSE

Please include the following in your submission to the RFP:

- 1) Executive Summary
- 2) Introduction to the firm, including the firm's experience with administering high-stakes licensing examinations.
- 3) Qualifications of the service team that will be directly responsible for administration activities, including resumes provided as an appendix.
- 4) Description of the firms' approach to examination administration, including in relation to those activities outlined in s. 9 (Service Requirements).
- 5) Proposed workplan and deliverables for psychometric services, starting with post-examination delivery activities for the April 2024 administration of the Acupuncturists, TCM-H, and TCM-P Examinations.
- 6) Any anticipated challenges with meeting the service requirements set out in s.9 and proposed solutions.
- 7) Any anticipated risks and related risk mitigation strategies.
- 8) A fee structure (CDN funds with GST/PST/HST shown separately, as applicable) for:
 - a. Services as outlined in s. 9 (Service Requirements),
 - b. Any out-of-scope psychometric services that may arise, and
 - c. An estimate of out-of-pocket expenses, if applicable.
- 9) Three references, including name, title, and contact information, preferably from provincial or national organizations administering high-stakes licensing examinations for whom the firm has provided services in the past five years.

- 10) Disclosure of any actual or perceived conflict of interest that may compromise the integrity of the services being provided to CARB-TCMPA.
- 11) Contact information for correspondence.

Any additional services not noted in this RFP may also be presented in a separate appendix for the consideration of CARB-TCMPA.

Proposals must be submitted in a digital format to facilitate the review process. Hard copies should not be mailed to the CARB-TCMPA office.

12. BASIS OF AWARDING THE CONTRACT

CARB-TCMPA will award the contract to a firm that, based on an evaluation of all responses and applying all criteria, is determined by the Board of Directors of CARB-TCMPA to be the best qualified to perform the services and at the best value.

CARB-TCMPA's evaluation process will include a review of the following in relation to each submitted proposal:

- 1) Understanding of CARB-TCMPA's service requirements.
- 2) Experience with the administration of high-stakes licensing examinations, including multi-lingual high-stakes examinations.
- 3) Qualifications of the service team.
- 4) Knowledge/awareness of health regulation in Canada and the TCM/A profession.
- 5) Experience working with diverse stakeholder groups.
- 6) Suitability of proposed methods/approach, timelines, and costs.
- 7) Identification of challenges/risks and feasibility of proposed solutions/strategies.
- 8) Information provided by references.
- 9) Past performance in relation to other contracts/clients.
- 10) Any information provided by the respondent as part of this RFP process.
- 11) Any other relevant information that may arise during the RFP process.

CARB-TCMPA reserves the right to:

- 1) Request further information and clarification from any respondent and consider this information in the evaluation of the respondent's proposal,
- 2) Negotiate with any or all respondents,
- 3) Accept any proposal, in whole or in part, considered to be in CARB-TCMPA's best interest in meeting standards of quality, experience, price, and overall value,

- 4) Verify with any respondent or with third parties any information set out in submitted proposals,
- 5) Check references in addition to those provided by any respondent,
- 6) Determine, in CARB-TCMPA's sole discretion, whether any situation or circumstance constitutes a conflict of interest,
- 7) Make changes to this RFP with appropriate notification,
- 8) Cancel the RFP process at any stage and issue a new RFP for the same or similar deliverables,
- 9) Reject any or all proposals, including but not limited to, proposals that contain misrepresentations or any other inaccurate or misleading information, and
- 10) Disqualify any respondent that engages in conduct contrary to the provisions of this RFP.

The rejection or disqualification of any or all proposals and any or all respondents shall not render CARB-TCMPA liable for any expenses, costs, losses, or any direct or indirect damages incurred or suffered by any respondent or third party.

13. RESPONDENT CONFIDENTIALITY

CARB-TCMPA will consider all proposals submitted in response to this RFP as confidential. The submission of a proposal will be deemed to be consent by the respondent to disclose the proposal to CARB-TCMPA's Board of Directors.

14. CLIENT CONFIDENTIALITY

All information provided by or obtained from CARB-TCMPA in any form associated with this RFP either before or after the issuance of this RFP ("Client Information") is the sole property of CARB-TCMPA and must be treated as confidential.

Client Information must not be used for any purpose other than replying to this RFP and the performance of any subsequent services for CARB-TCMPA and must not be disclosed without prior written authorization from CARB-TCMPA.

Client Information shall be returned to CARB-TCMPA immediately upon the request of CARB-TCMPA.

15. INTELLECTUAL PROPERTY

CARB-TCMPA retains all rights, title, and interest in and all intellectual property rights in any materials provided or made available in connection with the service requirements outlined in this RFP ("Examination Materials"). Examination Materials include without limitation any

data and documentation (technical data, organizational data, end-user data, operational data, survey data, competency profile, examination blueprint, examination content, examination reports) provided by or for CARB-TCMPA.

16. ACCURACY OF INFORMATION

CARB-TCMPA has made every effort to ensure the information in this RFP accurately reflects the administration process for the Pan-Canadian Examinations. However, as this information is based on CARB-TCMPA's understanding of services provided by our current psychometric services vendor, CARB-TCMPA makes no representation, warranty, or guarantee as to the accuracy of information in this RFP.

17. TERMINATION OF CONTRACT

CARB-TCMPA reserves the right to terminate any contract awarded without compensation if CARB-TCMPA determines that the selected firm submitted any inaccurate or incomplete information to CARB-TCMPA as part of this RFP.

Written notice of ninety (90) days must be provided if either party seeks to terminate any contract awarded prior to the contract's expiry date of July 31, 2027, to facilitate the transition of administration services to another provider and ensure continuity of service for CARB-TCMPA's examination candidates.

CARB-TCMPA shall have the right to terminate any contract awarded at any time and for any reason upon providing ninety (90) days written notice to the selected firm and CARB-TCMPA will compensate the firm for any deliverables provided up to the date of the notice of termination.

18. ACCEPTANCE OF PROVISIONS

The provisions of this RFP are deemed to be accepted by each firm submitting a response to this RFP.