

PROFESSIONAL STANDARDS BOARD
For the Planning Profession in Canada (PSB)

**Professional Education and
Examination Committee (PEEC)**

REQUEST FOR PROPOSALS

**Professional Examination
Question Bank Development**

November 9, 2020

KEY INFORMATION

| | |
|----------------------------------|---|
| RFP TITLE | <p>The title of this Request for Proposal (RFP) is: RFP – PSB: Professional Examination Question Bank Development</p> <p>Please reference this title in all correspondence.</p> |
| CONTACT PERSON | <p>The Contact Person for this RFP is: Nzinga Brown, Operations Manager, Professional Standards Board (PSB).</p> <p>Email: operations@psb-planningcanada.ca</p> <p>Please direct all enquiries, by email, to the Professional Standards Board (PSB) via the above-named contact person.</p> |
| EVALUATION COMMITTEE | <p>Professional Education and Examination Committee (PEEC) of the Professional Standards Board (PSB)</p> |
| RECEIPT CONFIRMATION FORM | <p>The Addenda and any further information relating to this RFP will be directed only to parties who have completed and returned the Receipt Confirmation Form.</p> |
| CLOSING TIME | <p>The Closing Date & Time is: Friday, November 27, 2020 at 5:00 pm ET.</p> |

TABLE OF CONTENTS

1 Introduction

- 1.1 Purpose of RFP
- 1.2 Professional Standards Board (PSB)
- 1.3 Professional Education and Examination Committee (PEEC)
- 1.4 Eligibility

2 The Opportunity

- 2.1 Background
- 2.2 Qualifications
- 2.3 Scope of Work/Methodology
- 2.4 Project Objectives
- 2.5 Deliverables
- 2.6 Project Budget
- 2.7 PSB and PEEC Obligations
- 2.8 Anticipated Timelines

3 Selection Process

- 3.1 Submission Requirements
- 3.2 Evaluation

4 Submission Instructions

- 4.1 Submission
- 4.2 Receipt of Complete RFP
- 4.3 Receipt Confirmation Form
- 4.4 Inquiries
- 4.5 Unofficial Information
- 4.6 Addenda
- 4.7 Withdrawal

5 General Conditions

- 5.1 Acceptance of Proposals
- 5.2 Oral Presentation
- 5.3 No Contract
- 5.4 Respondents' Costs and Expenses
- 5.5 No Claims
- 5.6 Insurance
- 5.7 Accuracy of Information
- 5.8 Evaluation of Proposal
- 5.9 Irregularities
- 5.10 Reservation
- 5.11 Assignment
- 5.12 Agreement

5 Receipt Confirmation Form

1. INTRODUCTION

1.1 Purpose of RFP

The intent of this RFP is to describe the scope of work for the development of at least 30 new multiple-choice questions, and accompanying study materials to address emerging issues in planning for the Professional Examination.

1.2 Professional Standards Board (PSB)

The Professional Standards Board for the Planning Profession in Canada (PSB) operates the "Certification and Accreditation Administrative Services Program" (CAASP) for the Canadian Institute of Planners (CIP) and the Provincial/Territorial Institutes and Associations (PTIAs). The services provided to our clients under the program include certification of planners and the accreditation of university academic planning programs.

1.3 Professional Education and Examination Committee (PEEC)

The Professional Education and Examination Committee (PEEC), is a committee of the PSB, and oversees matters of certification, including the assessment of applications for PSB's processes and eligibility for Candidate membership in CIP and the PTIAs, verification of mentorship and sponsorship of work experience and the delivery of courses and examinations leading to credentialing as a professional planner.

1.4 Eligibility

PEEC invites interdisciplinary teams of consultants, educators, editors, educational consultants, test/examination developers and psychometricians to submit proposals for this project. Submissions will be accepted by individuals (i.e. leader of the team), corporations, joint ventures, partnerships or any other legal entities suitably able to fulfill the requirements of this work. This work is best suited to those with experience in education and editing, as well as significant knowledge of the planning industry in Canada. Insight into municipal or provincial planning context would be considered an asset.

2. THE OPPORTUNITY

2.1 Background

The Professional Standards Board (PSB) was founded in October 2012. The Board administers the certification process for planners, and began administering the Professional Examination on behalf of the Provincial/Territorial Institutes and Associations (PTIA) in 2013. The PSB administered a long-answer format examination twice a year (once in March, once in September) from 2013-2015. The Examination consisted of three sections (Public Interest, Professional Responsibility and Ethics), with three questions in each section (candidates were required to answer at least two in each section), evaluating the candidate's knowledge and understanding of the enabling competencies of the planning profession. Examiners marked the written examinations based on a rubric of criteria and an Examiners Guide for each question. Candidates must achieve an 80% in order to pass the Professional Examination, and have three attempts to pass the Examination. Examinations were marked by two examiners, and sometimes three (if the marks varied between examiners). Staff provided the results of the Examination to candidates and to the PTIA.

Challenges with the Long-Answer Format

There were several challenges in administering the Professional Examination in long-answer format. Firstly, evaluating the Examinations was very subjective, and examiners often had highly contrasting assessments of a candidate's Examination, making it difficult to truly assess whether the candidate had demonstrated knowledge and understanding of the enabling competencies. Secondly, due to the length of time it takes to review long-answer questions and obtain assessments from multiple examiners, candidates often did not receive their results for three to six months. The subjectivity of the Examination results was also a source of complaints from candidates and examiners.

Transition to the Multiple-Choice Format

Upon consideration of the challenges to the long-answer format, the PSB decided to launch a multiple-choice format Professional Examination. The first sitting under the new format took place on Monday, September 26, 2016, and was administered by the new association management company, Redstone Agency. The Examination was administered online using an online testing software (ExamBuilder), which provided efficiencies to its administration and marking. Due to the format of the Examination, sittings were administered all across the country, with locations in Toronto, Vancouver, Calgary, and remotely using invigilators. All candidates were required to sit the Examination at the same time (exact times would vary across time zones), and the Examination continued to be administered twice a year.

Questions were developed for the new multiple-choice examination through the forming of a Professional Exam Subcommittee (PES). The subcommittee included representation from the PSB and PTIA members. The committee reviewed questions that were developed by former examiners, and presented them to PEEC for final approval before being deployed into the Professional Examination. The work of the PES resulted in 90 questions developed for the first sittings of the multiple-choice format of the Professional Examination. The questions continued to evaluate the candidate's knowledge and understanding of the enabling competencies, and were categorized into the same three sections as the long-answer format (Public Interest, Professional Responsibility and Ethics).

Current Professional Examination

The PSB continues to administer the multiple-choice Examination and PEEC continues to collect feedback in order to make improvements. A few changes have been made to the administration of the Professional Examination since 2016. Firstly, in 2017, an additional set of questions were added to the question bank in order to maintain the rigour of the Examination. A call for volunteers went out in the summer of 2017 to obtain additional questions for the question bank. Volunteers were asked to provide 7-10 questions based on the format and requirements set out for the multiple-choice format, and as a result, 70 new questions were added to the question bank. The new questions were reviewed and vetted by PEEC before being deployed in the Examination.

Another change to the Professional Examination implemented in 2018 was the development of a new Professional Examination Preparation Package. The guide was developed in response to candidate and PTIA concerns regarding the lack of preparation materials appropriate for a multiple-choice format Examination made available to candidates. The new Professional Examination Preparation Package, which includes sample questions, study tips, suggested readings, and important Examination information was developed by PEEC and launched for candidates sitting the September 2017 sitting of the Professional Examination. A subsequent revised Study Guide was made available in 2019.

Furthermore, as part of the PSB's Bilingualism initiative, the Professional Examination (and all preparation materials), were translated into both official languages at the end of 2018, with the first bilingual Professional Examination sitting occurring in March 2019.

An RFP was published to revise the existing 160 questions and develop new questions in order fulfill

the 320 question bank. The proposal and contract was fulfilled in 2019 and now the PSB is ready to continue the development and refining of the Professional Examination.

2.2 Qualifications

The successful team of consultants/educators/psychometricians selected to conduct this comprehensive review will:

- Demonstrate experience developing educational content and/or testing materials in a professional context
- Demonstrate of experience working directly or indirectly within the planning profession in Canada
- Demonstrate a range of relevant expertise to conduct the proposed scope of work
- Represent the diversity of our communities in the planning profession

2.3 Scope of Work and Methodology

The scope of work for the question bank development includes reviewing the Professional Examination Preparation Package, reference materials and additional readings for context on the Professional Examination; writing a variety of multiple-choice questions in the three different categories of the question bank ensuring consistent language and no regional bias, in order to contribute to a cohesive, rigorous bank of questions.

The project team will develop questions within the non-technical areas the PSB Professional Examination covers: Public Interest, Professional Responsibility, and Ethics and Decision-making. Note that the Professional Examination links back to the CIP Code of Professional Conduct and the enabling competencies.

The scope of work also includes developing 1-2 pages of study materials to include in the Study Guide to address the emerging issues included in the new questions.

Question Type Definitions:

Multiple-Choice

Multiple-Choice questions are composed of one question (stem) with multiple possible answers (choices), including the correct answer and three incorrect answers (distractors).

Case Study Multiple-Choice

Case Study Multiple-Choice questions are composed of a scenario ending in one question (stem) with multiple possible answers (choices), including the correct answer and three incorrect answers (distractors).

Case studies often present a problem, scenario, or reading upon which the candidates reflect to answer the question.

True/false

True/false questions are only composed of a statement. Candidates respond to the questions by indicating whether the statement is true or false.

The following number of questions should be created in the following question styles, with even representation (10 questions each) between the three non-technical areas of planning (Public Interest, Professional Responsibility and Ethics and Decision-Making):

| Question Type | Required # of Questions |
|----------------------------|-------------------------|
| Multiple Choice | 10 |
| Case Study Multiple Choice | 12 |
| True/false | 8 |

The project team will use the current question bank as a template for the style of questions, and will ensure that no direct repetition or “cues” are found within the question bank in its entirety.

Questions should examine the candidates’ level of professionalism in a variety of planning roles and duties and should focus on emerging issues in planning, including but not limited to: climate change, technological innovation, diversity and inclusion, demographic shifts, indigenous planning and the Canadian government’s Truth and Reconciliation findings.

The project team may use any resources at their disposal (online resources, interviews, academic papers, etc.) to conduct research into real-world scenarios within the planning profession in order to develop relevant and timely questions for the Professional Examination as well as the study materials.

The project team will be provided with a confidential copy of the full bank of questions in order to ensure the new questions fit cohesively with the full question bank.

2.4 Project Objectives

The objective of the project is to increase the amount of questions in the question bank over the in order to have a relevant and timely set of questions. A comprehensive question bank will enable the PSB to administer unique combinations of questions for each sitting. Furthermore, all of the English questions will be translated into French to enable the delivery of the Professional Examination in both official languages.

2.5 Deliverables

The final deliverable for this project is a document including 30 questions for the Professional Examination, which includes the question stem, correct answer (clearly indicated in bold) and distractors (order of distractors and the correct answers should be varied). PEEC will review the document and provide any initial feedback to the project team in order to make any final changes to the questions before they are approved for the Professional Examination.

The project team will also provide a document containing content to assist candidates with studying for the questions they have developed.

2.6 Project Budget

The PSB has secured funding for the completion of Professional Examination Question Bank Development project. The project team is required to provide details on the proposed fees for completion of this budget with their submission.

Intellectual Property Note: All documents, materials, information, data, and research findings produced, compiled, or collected through the conduct of this project are, and shall remain, the

property of the Professional Standards Board (PSB) and such may not be otherwise retained, copied, shared, published or distributed without the express written permission of PSB.

2.7 PSB/PEEC Obligations

The PSB or PEEC will provide to the project team all applicable background information, materials and historical records as appropriate and contact information for key stakeholders as required for the conduct of the project.

2.8 Anticipated Work Plan Summary & Timelines

The following is the estimated timeline for the competitive selection process and the project:

| Activity | Timeline |
|---|---------------------------------|
| Part 1 – RFP and Selection Process | |
| RFP Closing and Submission Deadline | November 27, 2020 |
| PEEC Proposal Review and Board Approval | November 27 – December 15, 2020 |
| Contract Awarded | December 15, 2020 |
| Part 2 – Project Work Plan | |
| Project Call with PEEC Chair | December 2020 |
| Submission of Initial Questions to PEEC | January 22, 2021 |
| PEEC Review of Submission | By January 29, 2021 |
| Part 3 – Final Steps & Wrap-Up | |
| Project Team Edits Submission as Needed | February 2021 |
| Final Submission Deadline | February 26, 2021 |
| Anticipated Implementation of New Question Bank | March 2021 |

All dates in the above timeline are estimates and subject to change by the PSB in consultation with the successful project team.

3. SELECTION PROCESS

3.1 Submission Requirements

The PSB requests the proposal be organized as outlined below in order to facilitate the evaluation and review process. If the project team wishes to include additional or supporting information, this should be placed in an appendix and referenced in the main body of the proposal.

The ‘Receipt Confirmation Form’ is to be received by the PSB to confirm a RFP submission is forthcoming.

1.0 – Cover Letter

2.0 – Table of Contents

3.0 – Executive Summary

4.0 – Experience

a. – Corporate Profile

- b. – Team Members Profiles and hourly rates
- c. – References

5.0 – Services

- d. – Project Understanding
- e. – Approach and Methodology
- f. – Project Execution
- g. – Project Schedule

6.0 – Fees

6.1 – Proposed Costs & Associated Fee(s) for Services

7.0 – Additional Features / Value Added

8.0 – Appendix (As deemed necessary to provide additional information)

3.2 Evaluation

Submissions will be assessed by PEEC. Applicants may be requested to submit additional information to clarify their proposal if required. Applicants may also be required to meet with PEEC, to provide additional information if required. Submissions will be evaluated based upon the following criteria:

| | Criteria | Weighting |
|---|---|-----------|
| 1 | Evaluation of relevant experience of the applicant and/or firm: relevant credentials; demonstrated experience working with other professional organizations on similar projects; demonstrated experience in successful engagement of stakeholders. Three references are required | 30% |
| 2 | Evaluation of proposed approach and methodology: creativity of the proposed strategy; evidence of the applicant’s understanding of the project requirements, constraints and risks; clear connection between the proposed approach and the highlighted scope of work and expected deliverables; evidence confirming that the project can be delivered effectively & successfully | 30% |
| 3 | Work plan and schedule: evidence confirming that the project will be completed by February 26, 2021. | 15% |
| 4 | Evaluation of proposed fees: a review of anticipated fees and ancillary costs; a value analysis | 25% |
| | Total | 100% |

Please be as specific as possible about the nature and scope of work to be performed, time required, and costs.

4. SUBMISSION INSTRUCTIONS

4.1 Submission

Responses to this RFP must be received at the mailing/email address before the closing time as stated on the inside cover of this RFP:

- (a) Responses received by mail or courier after the closing time (5pm on November 27, 2020) will not be considered and will be not be returned.
- (b) All times will be determined with reference to the clock used by the contact person for that purpose and the authors of late responses will be notified.
- (c) Email responses will be accepted and is preferred (please use subject line "PSB/PEEC RFP").

4.2 Receipt of Complete RFP

Respondents are solely responsible to ensure that they have received the complete RFP, as listed in the table of contents of this RFP, plus any addenda. Each and every response is deemed to be made on the basis of the complete RFP issued prior to the closing time. PSB accepts no responsibility for any respondent that does not receive all RFP information.

4.3 Receipt Confirmation Form

Any further information relating to this RFP will be directed only to parties who have completed and returned the Receipt Confirmation Form. This form must be completed, executed and delivered to the contact person via e-mail.

4.4 Inquiries

All inquiries regarding this RFP should be directed by email to:
Nzinga White, Operations Manager, Professional Standards Board
Email: operations@psb-planningcanada.ca

The following provisions shall apply to any communications with the contact person, or the delivery of documents to the contact person by email where such email communications or delivery is permitted by the terms of this RFP:

The PSB and PEEC do not assume any risk, responsibility or liability whatsoever to any respondent:

- (a) For ensuring that any electronic email system being operated for the PSB is in good working order, able to receive emails, or not engaged in receiving other emails such that a respondent's email cannot be received; and/or
- (b) If a permitted email communication or delivery is not received by PSB, or is received in less than its entirety, within any time limit specified by this RFP.

All permitted email communications with, or delivery of documents to, the contact person will be deemed as having been received by the contact person on the dates and times indicated on the contact person's electronic equipment or by the clock used by the contact person for that purpose.

4.5 Unofficial Information

Information offered to respondents in respect of this RFP from sources other than the contact person

is not official, may be inaccurate, and should not be relied on in any way, by any person for any purpose.

4.6 Addenda

The PSB and PEEC may, in its absolute discretion through the contact person, amend or clarify the terms or contents of this RFP at any time before the closing time by issuing a written Addendum.

Written Addenda are the only means of amending or clarifying this RFP, and no other form of communication whether written or oral, including written responses to enquiries as provided by section 4.4, will be included in or in any way amend or clarify this RFP. No other employee or agent of the PSB or PEEC is authorized to amend or clarify this RFP. The PSB will send via email a copy of any Addendum to all parties who have delivered a completed Receipt Confirmation Form.

4.7 Withdrawal Prior to the Closing Time

A project team may withdraw their response at any time prior to the closing time by delivering written notice to the contact person at the delivery address or via email prior to the closing time.

5. GENERAL CONDITIONS

5.1 Acceptance of Proposals

All proposal submissions shall be valid for a period of thirty (30) days from the closing date. It is understood and agreed that the PSB and PEEC may have thirty (30) days to accept.

5.2 Oral Presentation

An oral presentation, by one or more respondents, may be required after written proposals are received by the PSB and PEEC. This will be arranged at a mutually convenient time. Each respondent should be prepared to discuss and substantiate any areas of their proposal submissions as well as discuss their own qualifications as a respondent that can provide services as described in this RFP.

5.3 No Contract

By submitting a proposal and participating in the process as outlined in this RFP, respondents expressly agree that no contract of any kind is formed under, or arises from, this RFP, and that no legal obligations arise. The PSB reserves the right to terminate this RFP process at any time.

The PSB and PEEC reserve the right, at its sole discretion, to reject any and all proposals, for any reason. The PSB is not under any obligation to provide, discuss or explain the reasons for the rejection of any proposal.

5.4 Respondents' Costs and Expenses

Respondents are solely responsible for their own costs and expenses in preparing and submitting a proposal and participating in this RFP.

5.5 No Claims

The PSB, and its officials, employees, agents, consultants and advisors will not be liable to any respondent, or any firm, corporation or individual member of a respondent, for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the respondent, or any firm, corporation or individual member of a respondent, in preparing and submitting a submission or any other activity related to or arising out of this RFP.

5.6 Insurance

The successful respondent shall obtain and maintain in force during the term a minimum of 1 million dollars liability insurance that is satisfactory to the PSB.

5.7 Accuracy of Information

The PSB and PEEC give no representation whatsoever as to the accuracy or completeness of any of the information set out in this RFP, or any other background or reference information or documents prepared by third parties and made available to the respondents. Respondents will make an independent assessment of the accuracy and completeness of such information and will have no claim whatsoever against the PSB, or its officials, employees, agents, consultants and advisors, with respect to such information.

5.8 Evaluation of Proposal

PEEC will evaluate each respondent's proposal to determine which proposal, (if any) is in the best interests of the PSB. The PSB and PEEC in their sole discretion, reserve the right to accept or reject proposals submitted, to waive formalities and minor irregularities, and to request additional information required to fully evaluate a proposal.

5.9 Irregularities

The PSB reserves the right, in its sole discretion, to waive any irregularities in any proposal submittal. The PSB reserves the right to reject outright any or all proposals found to be containing false, inaccurate, or misleading information.

5.10 Reservation

The PSB and PEEC reserve the right to amend the Scope of Work and reserves the right to negotiate with the most suitable respondent or to cancel this RFP without award or compensation to respondents, their officers, their directors, employees or agents. The PSB and PEEC reserve the right to conduct discussions with any respondent that submitted a proposal to assure a full understanding of the proposal submitted.

5.11 Assignment

The successful respondent will not assign, transfer, convey, or sublet this agreement without the prior consent of the PSB.

5.12 Agreement

A contract will be executed between the successful project team and the PSB once award is made final.

RECEIPT CONFIRMATION FORM

Request for Proposal For:

PROFESSIONAL STANDARDS BOARD For the Planning Profession in Canada (PSB) Professional Examination Question Bank Development

Return to:

Email: operations@psb-planningcanada.ca

RESPONDENT CONTACT INFORMATION

NAME OF RESPONDENT: _____

NAME OF COMPANY: _____

STREET ADDRESS: _____

CITY: _____ PROVINCE: _____

COUNTRY: _____

EMAIL ADDRESS: _____

TELEPHONE(S): _____

CONTACT PERSON: _____

ACKNOWLEDGMENT OF TERMS OF RFP AND CONFIDENTIALITY

The undersigned is a duly authorized representative of the Respondent and has the power to sign this Receipt Confirmation Form on behalf of such Respondent or other interested party.

The Respondent or other interested party hereby acknowledges receipt and review of the RFP and all of the terms and conditions contained therein, including without limitation, all appendices attached thereto and agrees to comply with all of the terms and conditions set out in the RFP.

Respondent Representative or other interested party:

Name of the Authorized Signatory

Title

Date