

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

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

REQUEST FOR PROPOSALS

**Professional Examination
Study Guide Redevelopment**

June 15, 2021

KEY INFORMATION

RFP TITLE	<p>The title of this Request for Proposal (RFP) is: RFP – PSB: Professional Examination Study Guide Redevelopment</p> <p>Please reference this title in all correspondence.</p>
CONTACT PERSON	<p>The Contact Person for this RFP is: Larissa Johnston, 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, July 16, 2021 at 5:00 pm ET.</p>

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1. INTRODUCTION

1.1 Purpose of RFP

The intent of this RFP is to describe the scope of work for the review redevelopment of the current Study Guide used to prepare candidates to prepare for the Professional Examination administered by the Professional Standards Board for the Planning Profession in Canada.

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 educational consultants or adult learning specialists 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 developing and reviewing multiple-choice professional examinations for small/medium or emerging certification bodies. Subject matter expertise in land use planning 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. More recently, the examination has been administered in a virtual format only.

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 and again in 2021 (January).

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 to fulfill the 320 question bank. The proposal and contract was fulfilled in 2019, with an additional contract granted to complete an additional 30 questions in emerging issues in 2021.

The Standards Committee for the Planning Profession in Canada is also undergoing a process to update the Competency Framework for the planning profession, including how candidates should be evaluated against these competencies in the Professional Examination. This process will be completed in 2021. The updated competencies are out of scope of this RFP.

2.2 Qualifications

The successful educational consultant(s)/adult learning specialist(s) selected to conduct the redevelopment of the Study Guide will:

- Demonstrate experience writing educational content in a professional context for adult learners
- Demonstrate experience developing content for multiple-choice examinations and assessments
- Demonstrate an understanding of document/publication design principles, including accessibility
- Demonstrate a range of relevant expertise to conduct the proposed scope of work
- Demonstrate experience working directly or indirectly within the planning profession in Canada and demonstrate experience with the subject matter to be included in the study guide
- Preferably have skills in graphic design (or works with a graphic designer) to create visually appealing publications

2.3 Scope of Work and Methodology

The scope of work for this project includes reviewing the current Study Guide and evaluating its effectiveness to prepare candidates for the Professional Examination based on the current question bank, planning competencies and the certification standards. Upon completion of the evaluation, the proponent will redevelop and re-write the Study Guide to cater to adult learners, using the existing content and additional content they will obtain from external resources, including other publications from organizations within the planning profession, information provided by subject-matter experts, and other content relevant to prepare for a multiple-choice examination. In preparation to complete this work, the consultant must review and take into account the responses from two candidate surveys along with two webinars held by the PSB.

2.4 Project Objectives

The objectives of this project are to create a comprehensive and relevant Study Guide that is geared towards adult learners who are candidates to become fully accredited professional planners and will effectively help prepare candidates for the PSB Professional Examination in its multiple choice format.

2.5 Deliverables

The final deliverables for this project are an easy-to-read, accessible Study Guide document that will be published electronically on the PSB website, and includes an interactive Table of Contents and Executive Summary describing the purpose and intent of the readings. The proponent will first

prepare an evaluation of the current Study Guide and a plan for the redevelopment of the new Study Guide as a touchpoint before the main deliverables are completed.

2.6 Project Budget

The PSB has secured funding for the completion of the redevelopment of the Study Guide. The educational consultant(s)/ adult learning specialist(s) is/are 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	July 16, 2021
PEEC Proposal Review and Board Approval	July 16 – August 25, 2021
Contract Awarded	August 25, 2021
Part 2 – Project Work Plan	
Project Call with PEEC Chair	August 2021
Review of Study Guide and Preparation of Proposed Plan for Redevelopment	By October 1, 2021
PEEC Review of Plan for Study Guide Redevelopment	By October 29, 2021
Part 3 – Development of new Study Guide	
Submission of Draft Study Guide	By November 26, 2021
PEEC Review of Draft Study Guide	By December 17, 2021
Edits to Final Review of Study Guide	By January 14, 2022
Final Approval of Study Guide	By January 21, 2022
Publication of Study Guide	February 1, 2022

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 land use planners or 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 January 21, 2022.	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 July 9, 2021) 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:
Larissa Johnston, 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 Study Guide Redevelopment

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