OCCUPATIONAL THERAPY LICENSURE COMPACT

REQUEST FOR PROPOSALS

for Strategic Planning Consultant

UPDATED NOVEMBER 17, 2026

OCCUPATIONAL THERAPY COMPACT COMMISSION (OTCC)
executivedirector@otcompact.gov

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Request for Proposals (RFP):

for Strategic Planning Consultant

Issued by: Occupational Therapy Compact Commission (the "OTCC")
RFP Number: OTCC-RFP-FY2027-1
Date Issued: October 30, 2026 | clarifying updates posted November 17, 2026
Questions Due: November 16, 2026 | 3:00p Central Time
Proposals Due: December 1, 2026 | 3:00p Central Time
Contact: Amanda Perry, OTCC Executive Director | executivedirector@otcompact.gov

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1. Introduction and Purpose

The Occupational Therapy Compact Commission (OTCC) is the joint governmental body created by member states that have enacted the Occupational Therapy Licensure Compact (OTC). The OTCC administers the Compact, which allows licensed occupational therapists and occupational therapy assistants to practice across member states under a privilege to practice, while preserving each state's authority to protect the public.

The Commission is seeking a qualified consultant or firm to design and facilitate a strategic planning process that will produce a clear, actionable multi-year strategic plan. The process will be led through the OTCC's Executive Committee, with input from Commissioners and key stakeholders as appropriate.

This RFP describes the OTCC's needs, the scope of work, proposal requirements, evaluation criteria, and the selection process.

2. Background

The OTCC is responsible for, among other duties, adopting rules and bylaws, overseeing operation of the OTC's data system, coordinating information sharing among member states, supporting state licensing boards, and promoting uniform compliance with OTC requirements. As the OTC moves through implementation and growth, the OTCC requires a shared strategic direction to guide priorities, resource allocation, governance, and stakeholder engagement.

The OTCC has 37 member states of which eleven (11) are operational, meaning they are meeting their lawful intents and purposes of the OTC legislation. The OTCC has one (1) full-time dedicated staff member through a secretariat agreement which also provides support services (ex: IT, accounting, etc.). The OTCC has 37 appointed delegates, and the Executive Committee – charged with conducting business on behalf of the OTCC – consists of nine (9) members of which seven (7) are voting members and two (2) are non-voting ex-officio members.

OTCC Mission Statement: To facilitate interstate occupational therapy practice through the implementation of a nationally recognized privilege-to-practice system that enhances public protection and consumer access.

OTCC Vision Statement: To be the premier national standard for interstate mobility in occupational therapy, expanding access to services through a simplified, ethically regulated, and sustainable framework with membership across all jurisdictions.

3. Goals of the Engagement

The strategic planning process should:

1. Reflect the OTCC's mission and vision.
2. Assess the OTCC's internal strengths and weaknesses and external opportunities and threats, including financial sustainability, stakeholder relationships, communications, and commissioner engagement.
3. Identify specific strategic priorities and long-term goals for the next three (3) years.
4. Develop measurable objectives, performance indicators, and timelines for each priority.
5. Define roles, responsibilities, and resource implications for implementing the plan.
6. Build consensus and shared ownership among Executive Committee members.
7. Provide a framework for ongoing monitoring, reporting, and periodic updating of the plan.

4. Scope of Work

The selected consultant will be expected to perform the following tasks. Proposers should adapt and refine this scope in their own Statement of Work.

4.1 Project Initiation and Planning

- Hold a kickoff call with the OTCC's Executive Director to confirm goals, timeline, decision-making authority, and communication protocols.
- Review background materials, including the Compact text, bylaws, rules, budgets, committee reports, meeting minutes, and any prior planning documents.
- Prepare a project work plan and timeline.

4.2 Environmental Scan and Stakeholder Input

- Design and conduct an environmental scan and needs assessment. Methods may include interviews with Executive Committee members, a brief survey of Commissioners, and input from stakeholders such as state licensing boards, funders, practitioners, and regulatory partners.
- Summarize findings in a written briefing for use at the first planning meeting.

4.3 Facilitation of Strategic Planning Meetings

- Plan, facilitate, and document **a minimum of two (2) strategic planning meetings** of the OTCC's Executive Committee. Additional sessions may be proposed if the consultant believes they would improve outcomes.
- Prepare agendas, pre-reading materials, facilitation guides, and exercises in advance of each meeting, in consultation with the Executive Director.
- Facilitate discussions to build consensus on priorities, goals, and objectives.

- Provide meeting summaries and capture decisions, open questions, and action items within three (3) business days of each meeting.
- Meetings will be held virtually.
- Meetings must comply with the OTCC's applicable open meetings, public records, and confidentiality requirements.

4.4 Plan Development

- Draft the strategic plan based on Executive Committee decisions and input.
- Develop an implementation framework that includes owners, timelines, milestones, performance measures, and resource needs.
- Incorporate Executive Committee feedback through at least two (2) rounds of revisions.

4.5 Presentation and Adoption Support

- Present the draft plan to the Executive Committee
- Assist with revisions needed to support adoption by the Executive Committee on behalf of the OTCC.

4.6 Transition and Follow-Up

- Deliver a handoff session that explains how to implement, monitor, and update the plan.
- Depending on timing of the finalization of the Strategic Plan, the Executive Committee may request that the consultant present the final plan at the virtual spring 2027 OTCC meeting.

5. Deliverables

Proposers must describe how they will produce, at a minimum, the following deliverables:

#	***Deliverable***	***Description***	***Target Timing***
1	Project Work Plan	Detailed schedule, roles, communication plan, and assumptions	Within 2 weeks of contract execution
2	Environmental Scan Report	Summary of document review, interviews, survey, and stakeholder input, with key themes	Prior to Planning Meeting 1
3	Planning Meeting 1: Materials and Summary	Agenda, pre-read, facilitation guide, and written summary of outcomes priorities and strategic issues	January 2027
4	Planning Meeting 2: Materials and Summary	Agenda, facilitation guide, and written summary of outcomes (e.g., priorities, goals, objectives)	February 2027
5	Additional Meeting Materials (if proposed)	Materials and summaries for any further sessions	As proposed
6	Draft Strategic Plan	Complete draft including mission, vision, values, priorities, goals, objectives, and measures	February 2027
7	Implementation and Monitoring Framework	Action plan matrix with owners, timelines, metrics, and reporting cadence	With draft plan

8	Final Strategic Plan	Final plan in editable format and in a design-ready, shareable format	March 2027
9	Final Presentation	Presentation of the final plan to the Executive Committee	Upon completion
10	Status Reports	Brief written or verbal updates to the OTCC Executive Director.	Weekly

6. Action Items

Proposers must include an **Action Items** section that lays out the concrete steps the consultant will take, in sequence, from contract award through plan adoption and handoff. For each action item, identify the responsible party (consultant, Executive Committee, Executive Director, or all), the expected completion date or timeframe, and any dependencies. The action items should be consistent with the Statement of Work and Deliverables.

At a minimum, the action items should address:

1. Contract execution and kickoff.
2. Collection and review of Commission documents.
3. Design and launch of interviews and any survey.
4. Delivery of the environmental scan findings.
5. Scheduling and logistics for the two (or more) Executive Committee strategic planning meetings.
6. Preparation and delivery of meeting materials.
7. Post-meeting follow-up and distribution of summaries.
8. Drafting, review, and revision of the strategic plan.
9. Presentation, adoption support, and final delivery.
10. Handoff and follow-up.

Proposers should also list any action items they expect the OTCC to complete (ex: providing documents, etc.)

7. Proposed Timeline

The Commission anticipates the following timeline, which may be refined during contract negotiation:

Milestone	**Target Date**
RFP issued	October 30, 2026
Deadline for written questions	November 16, 2026
Answers to questions posted	November 18, 2026 by 3:00p Central Time
Proposals due	**December 1, 2026 by 3:00p Central Time**
Finalist interviews (if conducted)	December 2 – 11, 2026
Consultant selected by Executive Committee	December 14, 2026 (EC Meeting)
Contract executed	By December 28, 2026
Project kickoff	January 4, 2027
Planning Meeting 1	Mid – late January 2027

Planning Meeting 2	Early – mid February 2027
Draft plan delivered	February 21, 2027 (via email to Executive Director)
Draft plan edited via email	February 22 – March 1, 2027
Final plan adopted	March 8, 2027 (Executive Committee Meeting)
Tentative Final Plan Presentation	April – May 2027 (OTCC Commission Meeting – virtual)
***Dates are subject to change at the request of the OTCC Executive Committee or Executive Director.**	

8. Proposal Requirements

Proposals must be submitted electronically to executivedirector@otcompact.gov by the deadline above. Proposals should be clear, concise, and organized in the following order. Total length, excluding appendices, should not exceed 15 pages.

8.1 Cover Letter (required, included in 15 page maximum)

A signed letter, no longer than two pages, from an individual authorized to bind the proposer. The cover letter must:

- Identify the proposer (legal name, address, website, and primary contact with phone and email).
- Express interest in and understanding of the OTCC's needs.
- Summarize the proposer's qualifications and the key features of the proposed approach.
- Confirm that the proposal is valid for at least 180 days from the submission deadline.
- Disclose any actual or potential conflicts of interest, including any relationship with the OTCC, its members, or member states.

8.2 Statement of Work (required, included in 15 page maximum)

A detailed description of how the proposer will accomplish the scope of work in Section 4, including:

- The proposed methodology and approach to each phase of the work.
- The proposed design and format of the strategic planning meetings, including sample agendas, facilitation techniques, and how the proposer will build consensus among committee members.
- The approach to stakeholder input and environmental scanning.
- Any proposed modifications, additions, or enhancements to the scope, with rationale.
- Assumptions about OTCC responsibilities and resources.
- Approach to project management, communication, and risk management.

8.3 Deliverables (required, included in 15 page maximum)

A list of all deliverables the proposer will provide, including those in Section 5, with a description of each, format, and the proposed delivery date. Proposers may propose additional deliverables.

8.4 Action Items (required, included in 15 page maximum)

A sequenced list or table of action items as described in Section 6, with responsible parties and timeframes.

8.5 Qualifications and Experience (included in 15 page maximum)

- A description of the proposer's experience facilitating strategic planning for regulatory bodies, interstate compacts, licensing boards, associations, nonprofits, private/for-profit, or public agencies.
- Experience with governing boards and executive committees and/or multi-state or multi-jurisdictional bodies.
- Biographies and roles of key personnel who will work on the engagement, including who will serve as lead facilitator.
- Any subcontractors and their roles.

8.6 References and Work Samples (included in 15 page maximum)

- At least two (2) references from comparable engagements completed in the past five (5) years, with contact names, titles, phone numbers, and emails.
- At least one sample strategic plan or comparable work product (redacted if necessary).

8.7 Budget and Fee Proposal (included in 15 page maximum)

- A total not-to-exceed price for the work described, broken down by phase or deliverable.
- Pricing for any optional services or additional meetings.
- Payment schedule proposal (the OTCC anticipates payment tied to deliverables).

Budget range: For this project, the OTCC has a maximum budget of $7,000.00.

8.8 Required Documents (submitted as appendices, not included in 15-page max)

- Certificate of insurance, W-9, and any other forms requested by the Executive Committee.
- W-9 is required to be submitted with proposal
- Certificate of Insurance is required by chosen consultant prior to executing an agreement with the OTCC.

9. Evaluation Criteria

Nothing herein shall require the OTCC to provide specific evaluation documents.
Proposals will be evaluated by a selection committee designated by the Executive Committee using the following criteria:

RFP Evaluation Criteria
Understanding of the Commission's needs and quality of the proposed approach (Statement of Work)
Qualifications and experience of the proposer and key personnel
Quality and completeness of the Deliverables and Action Items, including meeting facilitation design
Cost and value
References and work samples
Other criterion as determined by the Executive Committee

The Executive Committee may invite finalists to interview. The Executive Committee may request clarifications or best-and-final offers.

10. Terms and Conditions

- **Questions:** Submit written questions to the contact listed above by the question deadline. Responses will be shared with all prospective proposers. Proposers should not contact OTCC staff or commissioners/delegates about this RFP during the solicitation period, except to ask clarifying questions about the RFP.
- **Proposal costs:** The OTCC is not responsible for costs incurred in preparing proposals.
- **Right to reject:** The OTCC reserves the right to reject any or all proposals, waive minor irregularities, negotiate with one or more proposers, and cancel or modify this RFP at any time.
- **No guarantee of award:** Issuance of this RFP does not obligate the OTCC to award a contract.
- **Contract:** The selected proposer will be required to enter into a written agreement with the OTCC on terms acceptable to the OTCC. The OTCC's standard terms will govern, including provisions on independent contractor status, confidentiality, ownership of work product, insurance, indemnification, and termination.
- **Public records and confidentiality:** Proposals may be subject to public records laws. Proposers should clearly mark any proprietary or confidential information.
- **Conflicts of interest:** Proposers must disclose any actual or potential conflicts of interest. The OTCC may disqualify a proposer based on an undisclosed conflict.
- **Ownership of work product:** All deliverables produced under the contract will be the property of the OTCC.
- **Nondiscrimination:** The OTCC is committed to equal opportunity and encourages proposals from qualified firms of all sizes and backgrounds.

11. Submission Instructions

Submit proposals in PDF format to **executivedirector@otcompact.gov** by **December 1, 2026 at 3:00p Central Time**. The subject line should read: "OTCC Strategic Planning Proposal – [*Proposer Name*]." Late proposals will not be considered.