

A photograph of two women in a professional setting, looking at a tablet together. The woman in the foreground is pointing at the screen, while the woman behind her looks on attentively. The background is softly blurred, showing a window and office furniture.

ANNUAL REPORT

2016/17

TOUCHSTONE

INSTITUTE

COMPETENCY EVALUATION EXPERTS



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Ontario

Touchstone Institute receives financial support from the Government of Ontario



About Touchstone Institute

Touchstone Institute is a non-profit corporation that offers expertise in evaluation and curriculum development to support excellence in Canada's health professions. Our services respond to the needs of regulators and health care industries to assess competency and support professional transitions, particularly for internationally educated health professionals. Assessments ensure candidates meet Canadian standards, while education programs for international medical graduates support a successful transition to residency training in Ontario.

We foster strong relationships with key stakeholders to share knowledge, promote dialogue and implement programs with cross-sectoral impacts.

Our Clients and Partners

- Educational institutions and bridging programs
- Employers
- Government
- Health professionals
- Language assessors
- Professional associations
- Regulatory bodies
- Researchers
- Settlement agencies
- Standardized clients

Assessments and Projects



A 360° View of Culture and Communication

A project that engages employers, immigrant serving organizations and internationally trained individuals in the development of a common framework for understanding and applying language, communication and cultural skills in the context of the Canadian workplace. *Initiated in 2016 with funding from the Ministry of Citizenship and Immigration.*

Alberta Registered Nurses Assessment Program

A Multiple Choice Exam (MCQ) and Objective Structured Clinical Exam (OSCE) delivered to internationally educated nurses (IENs) seeking registration in Alberta. This assessment evaluates the knowledge, skill and judgement of an IEN in comparison to recent graduates of Canadian nursing programs. *Developed by Touchstone Institute for launch in 2017.*

Canadian Medicine Primer (CMP)

Optional program offered to visiting fellows and to residents studying in Canada under visa arrangements. *Developed and administered by Touchstone Institute since 2014.*

The CELBAN Centre

National administrative centre for the Canadian English Language Benchmark Assessment for Nurses (CELBAN), a pan-Canadian occupation-specific language assessment for internationally educated nurses. *Test renewal, maintenance and administration managed by Touchstone Institute since 2014.*

CFAS ART Lab Professional Certification Assessment

A certification assessment for assistive reproductive technology lab professionals operating in a non-supervisory position (embryologists and andrologists). *Currently in development.*

Communication and Language Consulting Services

The Communication Program provides consulting services to regulators and professional associations on issues associated with communication competency and its impact on professional competence to help inform their policies and practices.



Internationally Educated Nurses Competency Assessment Program (IENCAP)

An assessment consisting of an MCQ and OSCE that evaluates the knowledge, skill and judgement of internationally educated nurses seeking registration in Ontario as compared to recent graduates of Canadian nursing programs. *Developed by Touchstone Institute; administered since 2013.*

Internationally Graduated Optometrists Evaluating Exam (IGOEE)

An assessment consisting of an MCQ and OSCE that evaluates the knowledge, skills, attitudes and values of internationally graduated optometrists as compared to recent graduates of Canadian optometric programs. *Developed by Touchstone Institute; administered since 2015.*

Knowledge and Competency Assessment Tool (KCAT) for Internationally Educated Dietitians

Tablet-based exam that is part of the College of Dietitians of Ontario (CDO) Prior Learning assessment. *Developed by Touchstone Institute; administered since 2016.*

National Assessment Collaboration Objective Structured Clinical Exam (NAC OSCE)

OSCE that assesses the readiness of an international medical graduate (IMG) for entrance into a Canadian residency program. *Developed by the Medical Council of Canada; administered by Touchstone Institute since 2011.*

Nurse Practitioner Practice Assessment (NPPA)

Assessment that is part of a quality assurance program for nurse practitioners in Ontario. *Redeveloped by Touchstone Institute for 2017.*

Optometric English Language Proficiency Assessment (OELPE)

Occupation-specific language assessment for the University of Waterloo International Optometric Bridging Program to identify readiness of internationally educated who require language training as part of their bridging to practice in Canada. *Currently undergoing renewal and development with Touchstone Institute.*

Perspectives Symposium

An annual one-day symposium that brings together thought-leaders and practitioners from health care, education and research to explore emerging issues in communication, assessment and education. *Programmed and hosted by Touchstone Institute since 2015.*

Pre-Residency Program (PRP)

Mandatory orientation program for IMGs who have been accepted into an Ontario specialty residency program. *Developed and administered by Touchstone Institute since 2009.*

Pre-Residency Program – Family Medicine (PRPFM)

Mandatory orientation program for IMGs who have been accepted into an Ontario family medicine residency program. *Developed and administered by Touchstone Institute since 2007.*

A Message from Ken Harris

This year, the Touchstone Institute board embarked on a process of discovery and discussion to develop a shared vision for the future. The result was a renewed focus on growth and a clarified sense of purpose for us all. In concrete terms, we crafted new vision and mission statements to guide the organization:

Our vision: Public confidence in professional competence

Our mission: To excel in providing competency assessment and education services that meet professional and societal needs

We are a responsive organization, with in-house expertise in competency assessment, simulation, education, research and analysis, and infrastructure to administer large-scale clinical exams and classroom learning. Our trusted relationships with regulators, educators, employers and policy makers allow us to share knowledge and implement programs with valuable cross-sectoral impacts.

With our eye toward this renewed vision and mission, we will seek out opportunities to apply these valuable resources where they are most needed – to promote more competent, better prepared and safer health care professionals for the Canadian public.

Dr. Kenneth Harris, Chair, Board of Directors, Touchstone Institute



A Message from Sten Ardal

Our move to Wellington Street has yielded significant benefit for our operations and for staff. Our larger classrooms better accommodate our education programming, and can be combined to create an event space where we have held large consultations as well as our 2017 Perspectives Symposium. We also have easier access to assessment rooms and can stage all of our candidates, simulated clients, examiners and support staff from the same floor.

While the new location is wonderful, my utmost pride is in the accomplishments of the staff who demonstrate their value to the organization and our clients every day. For many this has resulted in advancement to positions as coordinators, managers, and directors. One of our first employees, Alex Tran, is now the Director of Exam Administration, a new position required to oversee our expanding range of assessments. Also advancing to an executive role is our psychometrician Sandra Monteiro, who as Director of Research and Analysis now has a small team that is having a big impact, as evidenced by our increased psychometric range, quality assurance initiatives, and presence at national and international conferences.

This year marks the launch of a new and promising chapter for Touchstone Institute.

Sten Ardal, CEO, Touchstone Institute



Assessment Program

Our Assessment Program develops and administers large-scale written and clinical exams that reliably assess the competencies of health professionals and their readiness to practice in Ontario.

Exams are constructed and validated by our in-house experts, who work in collaboration with practising health professionals and experts in health care from universities, professional colleges and regulatory bodies. Our standardized processes reflect our commitment to quality assurance at every stage – from program development, administration and reporting to review, maintenance and renewal.

Strong relationships with practising health professionals and experts in health care

PROFESSIONAL LEADERSHIP



ENGAGED DESIGN LIFECYCLE



Proven process includes blueprinting, item writing, field testing, pilot testing, launch and review

Psychometrics evaluate and validate the accuracy of procedures and results

VALIDITY & REPORTING



COMPREHENSIVE TRAINING



Supportive training for profession-specific assessors

Our Team: Alex Tran – *Director, Exam Administration* • Jannine Vicari – *Exam Coordinator* • Samantha Foreman – *Exam Coordinator* • Simon Nguyen – *Exam Technologist* • Debra Sibbald – *Executive Director, Assessment Programs* • Shawn Chisholm – *Exam Coordinator* • Rae-Ann Iacucci – *Project Coordinator* • Will Truong – *Manager, Exam Unit* • Tana Tugendhat – *Exam Coordinator*



Communication Program

The Communication Program provides language and communication resources, along with tools and services for regulators, government, employers, and educators to support safe and effective practice in Canada's health professions.

With an emphasis on inter-professional collaboration and practice, the Communication Program explores issues associated with occupation-specific language competence and its impact on professional communication competencies. Our work focuses on IEHPs as they traverse the pathway from registration to employment.

We maintain relationships with a range of stakeholders – regulators, trainers, academics – who benefit from greater knowledge in this area to inform their policies and practices.

Resources and tools for regulators, government, educators and employers



COLLABORATION & KNOWLEDGE SHARING

LANGUAGE & COMMUNICATION ASSESSMENT



Administration of occupation-specific communication assessments

Proven methods for development, renewal and validation of test content and procedures



EXAM REVIEW & DEVELOPMENT

STANDARDS & BENCHMARKS



Fair, defensible language proficiency and communication competency standards

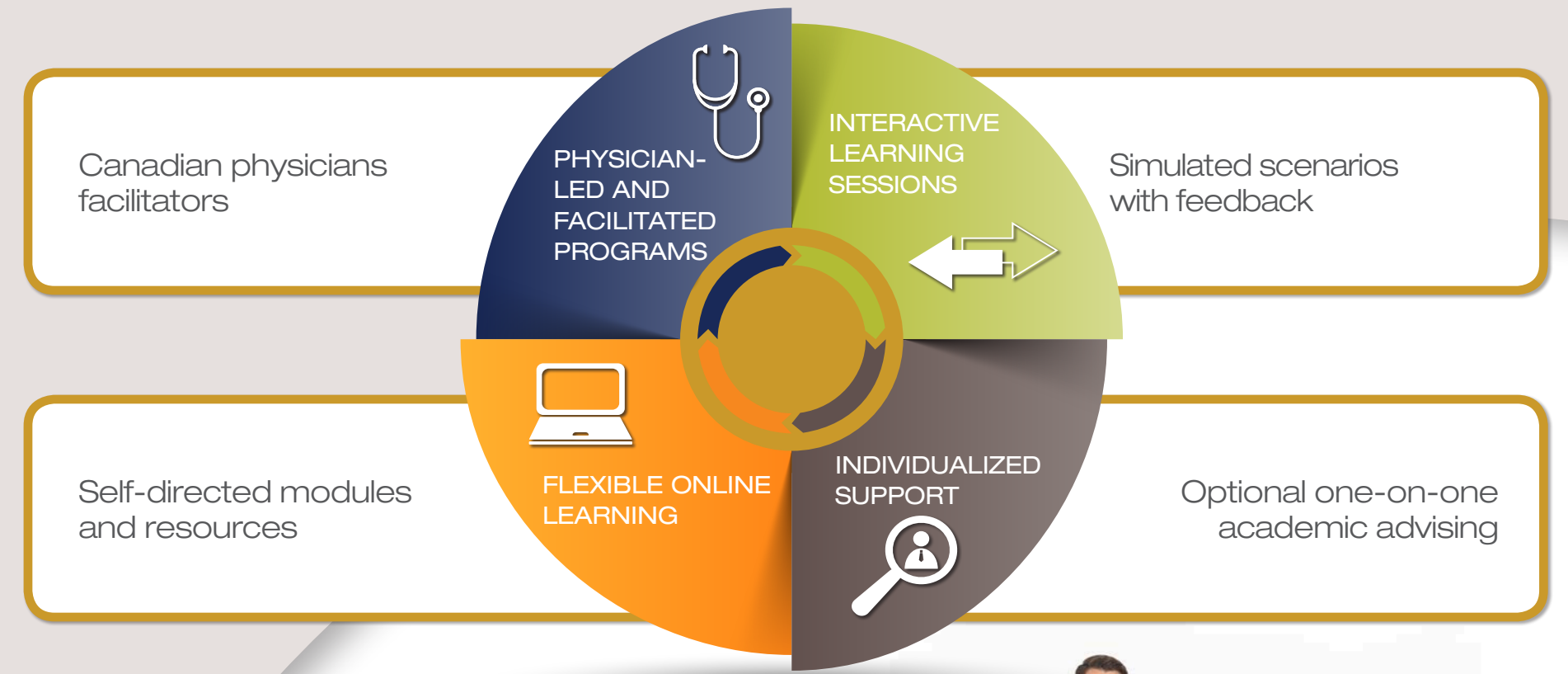
Our Team: Luxshi Amirthalingam – Exam Coordinator, The CELBAN Centre • Yzelle Duran – Exam Coordinator, The CELBAN Centre • Claudia Aldecoa – Project Coordinator • Andrea Strachan – Director, Communication Program • Dan Grossutti – Manager, The CELBAN Centre • Karina Smith – Exam Coordinator, The CELBAN Centre • Lysa Le – Exam Coordinator, The CELBAN Centre • Julie Gallo – Project Coordinator



Education Program

Our education programs orient international medical graduates to the Canadian health care context.

Programs were developed with the support of Ontario's postgraduate medical programs and in consultation with physicians from various specialties, medical schools and communities throughout Ontario. Sessions are delivered by consulting physicians and medical educators from across Ontario and often include scenarios using our simulated clients to enrich the learning experience.



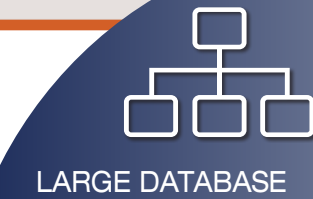
Our Team: Adrian Frisina – *Manager, Education & Program Support* • Hannah McLean – *Education Program Coordinator* • Jessica Wood – *Administrative Assistant, Education Program* • Tania Gamage – *Education Program Coordinator*



Simulation Program

Our Simulation team trains actors for high-stakes assessments and formative learning contexts. Our database of simulated client actors includes over 1,000 men and women of all ages (16 to 75), physical types, ethnic groups, and backgrounds. Acting as patients, colleagues, or in other key roles, these simulated clients recreate real-world situations that allow participants to practice their skills or demonstrate their expertise.

Recruitment and screening of diverse simulated clients



CUSTOMIZED SCENARIOS



Case development for Canadian health professions

Built-in checks and balances to ensure valid, fair assessments and authentic learning experiences



COMPREHENSIVE TRAINING



Standardization for high-stakes assessments and simulation for educational contexts



Our Team: Emma Marcon – *Standardized Client Trainer* • Helina Shebeshe – *Simulation Program Assistant* • Emily Theobald – *Standardized Client Trainer* • Karen Huszar – *Standardized Client Trainer*

Research and Analysis

Our Research and Analysis team provides psychometric support to all our programs. Through rigorous, evidence-based processes, they guide the development of fair, reliable assessments and ensure defensible results. They work alongside our clients to deliver reports that meet their needs and requirements. Data is also used to evaluate and evolve our programs to ensure their continuing validity.



Our Team: Sandra Monteiro – *Director, Research & Analysis* • Karen Coetzee – *Psychometrician* • Tabasom Eftekari – *Test Analyst*



Knowledge Sharing



We continually seek out opportunities to connect with others in the field of competency assessment and medical education to share our research, experience and learning.

In 2016/17, we participated in the following events in Canada and internationally.

- Assessing clinical competencies with confidence: Fundamental approaches, blueprinting and multiple choice question writing for nurse educators, University of Toronto – Debra Sibbald
- A systematic approach to customizing and improving examiner training and standardization, part of the International Advanced Assessment Course (London, England) – Debra Sibbald
- Communication competency assessment for nurses, CNO Registration Committee – Andrea Strachan
- Competencies are context dependent: Evaluating the reliability of competency-based OSCEs for internationally trained health professionals, AMEE (Barcelona) – Sandra Monteiro, Megan McConnell, Debra Sibbald and Geoff Norman
- Customized standard setting for internationally trained health professionals, Canadian Network of Agencies for Regulation (CNAR) Conference (Toronto) – Sandra Monteiro and Debra Sibbald
- Designing and implementing structured examiner training, workshop at the International Advanced Assessment Course (London, England) – Debra Sibbald
- Does the medium change the message? Research in Medical Education Conference (Düsseldorf, Germany) – Sten Ardal
- Everything I need to know I learned in ... SP training, Association of Standardized Patient Educators (ASPE) Conference – Amy Myers
- Experiences with CELBAN and other specific-purpose communication assessments, Council of Ministers of Education (Toronto) – Andrea Strachan
- i-Assess: Introducing tablet-based assessment impacts OSCE ratings, Canadian Medical Education (CCME) Conference (Montreal) – Sandra Monteiro, Alex Tran, Debra Sibbald, Darko Giacomini
- Introducing tablet-based assessment with OSCE ratings, International Meeting of UCAN (Düsseldorf, Germany) – Alex Tran

- Introduction to the Optometric English Language Proficiency Assessment (OELPA), presented to the Federation of Optometric Regulatory Authorities of Canada (FORAC) Board Meeting (Montreal) – Andrea Strachan
- Launching a “fit-for-purpose” competency screening examination for international graduated optometrists (IGOs), AMEE (Barcelona) – Debra Sibbald, Sandra Monteiro, Sten Ardal, Sarah MacIver and Ralph Chou
- Measuring outcomes in transition programs, Touchstone Institute Perspectives Symposium (Toronto) – Sandra Monteiro and David Rojas
- Osceology workshop, Continuing Professional Development, Faculty of Pharmacy, University of Toronto – Zubin Austin and Debra Sibbald
- Preparing and evaluating standardized patients for use in high-stakes examinations, CCME Conference (Montreal) – Fergus O’Connor and Karen Huszar
- “Prick up your SP ears!” The importance of really listening in order to provide correct responses in an assessment or training encounter, ASPE Conference (Tampa, FL) – Karen Huszar
- Script retention and memorization in senior/elderly standardized patients, ASPE (Tampa, FL) – Sarah Kaff
- Masterclass OSCE workshops, Singapore Ministry of Health – Katharine Boursicot and Debra Sibbald
- Talk Isn’t Cheap, CNAR webinar series – Andrea Strachan
- Towards defensible language proficiency standards, Council on Licensure, Enforcement and Regulation (CLEAR) Annual Conference (Portland, Oregon) – Andrea Strachan

- Validating a “fit-for-purpose” competency screening examination for international graduated optometrists (IGOS), CCME Conference (Montreal) – Debra Sibbald, Arthur Rothman, Sandra Monteiro, Sten Ardal, Martin McDowell, Sarah MacIver and Ralph Chou. Winner of the best faculty poster award.
- What makes an occupation-specific language assessment successful – The example of CELBAN, CNAR Conference (Toronto) – Daniel Grossutti and Andrea Strachan

Perspectives Symposium

Our third annual symposium was held March 2 at our own facility with 130 participants. This year, we explored the development of transition programming for IEHPs in Ontario.



Program Support

The staff providing program support are specialists critical to the success of the organization. They provide administrative support, executive assistance, project management and communications for all program areas.



Our Team: Cameo Allan – *Project Manager* • Jocelyn Dilworth – *Executive Assistant to the CEO* • Sandra Braun – *Corporate Communications Specialist* • Meagan Bowie – *Administrative Assistant, Special Projects* • Umayangga Yogalingam – *Project Coordinator*

Finance and Operations

Touchstone Institute programs run smoothly and efficiently thanks to our finance and operations teams. They ensure our organization's technical and financial systems function optimally and manage staff, procedures, and facilities in a professional and seamless manner.



Our Team: Bill Quinn – *Senior Finance Coordinator* • Meng To – *Technology & Facilities Coordinator* • Suzanne Ward – *Operations Assistant* • Milan Milanovic – *Manager, IT* • Suzanne Bambrick – *Director, Human Resources & Operations* • Venkata Marella – *Director, Finance*

Governance

Board of Directors: *Left to Right:* **Steve Watts** – Partner in Audit Services, KPMG LLP; Treasurer, Touchstone Institute

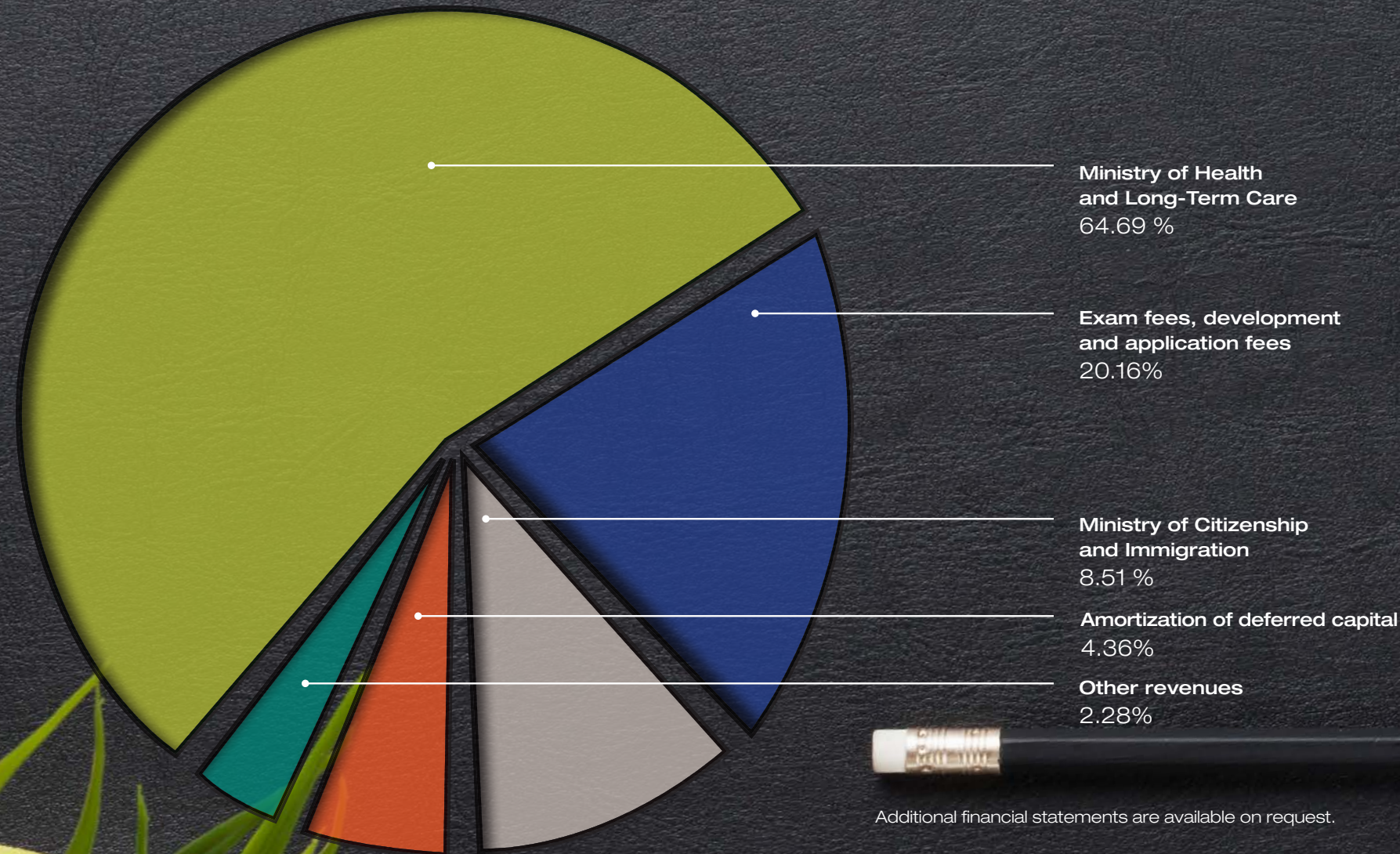
- **Ken Harris** – Board Chair, Touchstone Institute; Director of Education, Royal College of Physicians and Surgeons of Canada
- **Sten Ardal** – CEO, Touchstone Institute
- **Lianne Krakauer** – Career Coach & Leadership Consultant (joined June 2017)
- **John McKinley** – Principal, JMcKinley Consulting and CloudPHI
- **Ella Ferris** – Retired health care executive
- **Dan Faulkner** – Deputy Registrar, College of Physicians and Surgeons of Ontario

Absent:

- **Parveen Wasi** – Assistant Dean of Postgraduate Medical Education and Professor of Hematology, McMaster University;
- **Brian Hodges** (joined June 2017) – Executive Vice-President of Education, University Health Network, and Professor in the Faculty of Medicine and at the Ontario Institute for Studies in Education, University of Toronto;
- **Anne Coghlan, Rocco Gerace, Mark Walton** (terms completed); **George Thomson, Trudy Reid** (resigned)



Sources of Revenue 2016/17



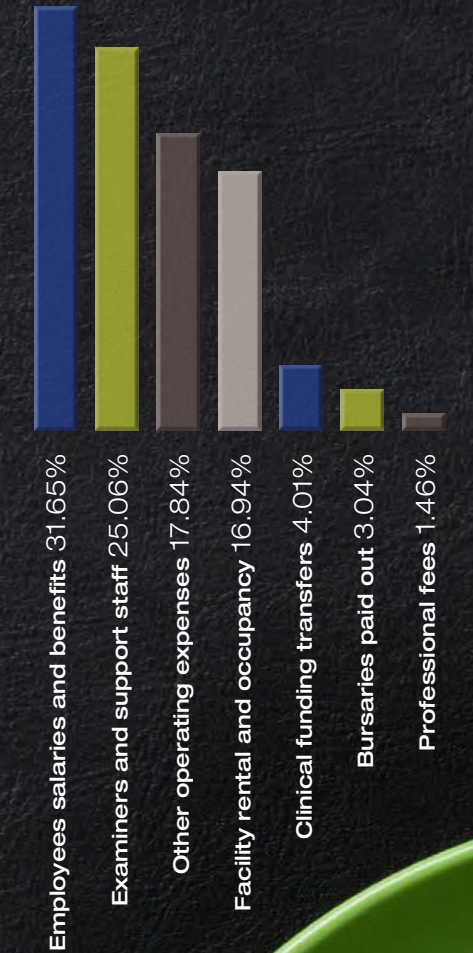
Additional financial statements are available on request.

Condensed Statement of Operations

Year Ended March 31	2017	2016
Revenues		
Ministry of Health and Long-Term Care	7,590,001	7,544,749
Ministry of Citizenship and Immigration	998,230	831,206
Exam fees, development and application fees	2,365,612	2,089,182
Other revenues*	267,163	1,362,614
Amortization of deferred capital funding	512,386	673,817
	11,733,392	12,501,568
Expenses		
Examiners and support staff	2,606,485	2,793,688
Employee salaries and benefits	3,291,387	3,225,443
Facility rental and occupancy	1,761,297	1,352,552
Bursaries paid out	315,750	270,000
Clinical funding transfers	416,700	516,708
Professional fees	152,524	369,408
Other operating expenses	1,855,760	2,277,117
	10,399,903	10,804,916
Excess of revenues over expenses	1,333,489	1,696,652
Repayable to Ministry of Health and Long-Term Care	(41,833)	(678,667)
Net excess of revenues over expenses	1,291,656	1,017,985

Other revenues for 2016 include a \$1,236,942 HST refund for 2016 and previous years.

Expenses 2016/17





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