ONCAT caton

Ontario Council on Articulation and Transfer

180 Dundas Street West, Suite 1902
Toronto, Ontario M5G 1Z8

Tel: (416) 640-6951

Fax: (416) 640-6959

www.oncat.ca

REQUEST FOR PROPOSAL

TECHNOLOGY CONSULTANT/ CONSULTANCY

REVIEW OF ONCAT's INFORMATION TECHNOLOGY SERVICES

CLOSING DATE:
September 25, 2019 11:00PM (Eastern Standard Time)

CLOSING LOCATION:
Ontario Council on Articulation and Transfer (ONCAT)
Suite 1902, 180 Dundas Street West
Toronto, ON M5G 1Z8

PREPARED BY:
Ontario Council on Articulation and Transfer

CONTACT:
Shauna Love
slove@oncat.ca

Operations Director
416.640.6951 ext. 302

MAIN (CORPORATE) WEBSITE:
www.ONCAT.ca

STUDENT-FACING WEBSITE:
www.ONTransfer.ca

Contents

ONCAT Overview

Established in 2011, the Ontario Council on Articulation and Transfer (ONCAT) was created to enhance academic pathways and reduce barriers for students looking to transfer among Ontario's 45 public colleges and universities, and Indigenous institutes. Alongside our members and stakeholders, we do this by:

- Supporting projects aimed at creating and expanding credit transfer pathways and improving our understanding of student mobility and the student transfer experience;

- Engaging Ontario's regions and communities through facilitated groups;

- Collecting credit transfer data and sharing resources;

- Hosting events that brings together credit transfer experts from across the province; and,

- Connecting students to transfer opportunities through ONTransfer.ca and stakeholders through our corporate website ONCAT.ca

Invitation

- As ONCAT continues to work with students and stakeholders, its IT environment has evolved to support dozens of projects, organizational communication and administrative needs, relationship management, grant making, human resources and more.
- ONCAT invites qualified individuals/ organizations to submit a proposal for a contract to conduct a strategic review of ONCAT's information technology infrastructure.
- ONCAT's goal is to ensure the most efficient technology, software and support is in place as we expand our reach to stakeholders and improve internal and external operational efficiency.

Project Overview

ONCAT was established in 2011 as a not-for-profit organization and is primarily funded by the Ministry of Training, Colleges and Universities (MTCU). As ONCAT has matured and grown as an organization we require a strategic review of our current IT Infrastructure to ensure operational effectiveness and successful future administrative system integration. The focus of the IT review will be an evaluation of our current general IT support, current financial administrative systems (payroll and accounting) and recommendations for adopting a CRM tool to support increased collaboration with multiple stakeholder groups. Additionally, ONCAT plans to provide system-wide training through webinars and e-learning opportunities in collaboration with our stakeholders and is looking for a roadmap to achieve successful implementation of these tools.

ONCAT has two websites, ONCAT.ca and ONTransfer.ca.

ONCAT.ca is the "corporate" site, which for the most part serves government, administration at colleges and universities, and other stakeholders who have a vested interest in postsecondary education in Ontario. It is the site where information about projects, research, staff, events etc. can be found. ONCAT staff administer content on this website through a content management system. ONCAT works with one digital service agency and a hosting company to support this specific website.

The ONTransfer.ca website is a complex portal designed to help students search and compare potential transfer opportunities within postsecondary education in Ontario. Each of ONCAT's 45 member institutions has administrator access to the portal so they can publish their transfer information for students to search for transfer opportunities to their school. The portal consists of two different administrative systems managed by two different vendors and a separate hosting company.

ONCAT plans to begin redeveloping the ONTransfer.ca website in 2020 with enhanced functionality and administrative efficiencies for students and stakeholders. As the two websites are a key part of ONCAT's technology portfolio they should be considered to inform system integration plans in the future. The goal of this Request for Proposal is not to select a vendor for the redevelopment of ONTransfer.ca or ONCAT.ca.

For general information about ONCAT, please visit www.ONCAT.ca. For more information on the student portal, visit www.ONTransfer.ca.

ONCAT is using mostly up to date software, with good practices for security of the environment across all areas including the network, workstations and servers. A recent upgrade of the Microsoft Office suite has been completed and best practices are deployed for backups, including regular recovery testing.

ONCAT's IT environment is supported by the Council of Ontario Universities (COU) who are also located at 180 Dundas West in Toronto. In 2018, COU hired a third-party consultant to conduct a network vulnerability assessment and penetration testing.

Applicants can request a basic overview of ONCAT's current IT infrastructure and administrative software by emailing Natalie Isber, ONCAT's Operations Coordinator, at nisber@oncat.ca.

Project Objectives

The main objectives of the project include:

- Capture ONCAT's vision to integrate and optimize systems where possible and devise an appropriate roadmap for the future.
- Conduct an assessment of ONCAT's technology infrastructure including ONTransfer.ca and ONCAT.ca
- Review all components of current technology infrastructure.

- Provide technology infrastructure recommendations based on the current assessment and vision, factoring in human resource support/ administrative needs.

Proposal Requirements

Proposals must at a minimum contain the following:

1. **Contact information for the respondent.**

2. **Description of the proposed approach**. This should include a description of the organization's business principles and approach to developing an architectural vision, principles and roadmap.

3. **Detailed work plan**. The work plan should describe activities that are specific, measurable, achievable and realistic. Include a timeline of major tasks and milestones.

4. **A detailed budget.**

5. **Qualifications of the respondent** to provide the requested services including capability, capacity, similarly complex projects and related experience and client references. Confirmation of availability of individuals in proposal.

6. **Applicants resume(s) or biographies** outlining relevant experiences. Include a listing of the staff to be assigned to this project and their respective qualifications, past experience on engagements of this scope including resumes, and their role in those past engagements.

7. **Two successful case studies** of technology reviews for organizations (ideally not-for-profit or provincially / federally funded organizations).

8. **A statement of understanding** on any confidential issues for this project and disclosure concerning any perceived or potential conflicts of interest.

9. A **description of the outcome monitoring and evaluation plan** including a list of tools to track process, output and outcome measures for each component of the review.

10. Technical definitions if required.

Communication

All communication such as 1) requests for additional information, 2) clarification, directed in writing by email to: slove@oncat.ca

All such RFP related inquiries must be received no later than the September 13 at 4:00 p.m. Eastern Standard Time. ONCAT will attempt to provide any assistance or additional information of a reasonable nature that may be requested by interested Consultants/Consultancies.

Submission Process

1. Please review all sections of this RFP carefully and follow all instructions. Incomplete submissions will be not be considered.
2. Applicants can request a basic overview of ONCAT's current IT infrastructure and administrative software by emailing Natalie Isber, ONCAT's Operations Coordinator, at nisber@oncat.ca between August 6th and September 24th, 2019.
3. Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals that depart from or materially alter the terms, requirements, or scope of work defined by this RFP will be rejected.
4. All costs associated with developing or submitting a proposal (including an interview) in response to this RFP and/or in providing any additional information, which ONCAT considers necessary to evaluate the Proposal shall be borne by the Consultant/Consultancy. ONCAT assumes no responsibility for such costs.
5. All pricing submitted will be considered fixed unless otherwise indicated herein.
6. All proposals should identify the Consultant/Consultancy proposed team of professionals, including those employed by subcontractors, if any, along with respective areas of expertise and relevant credentials. Agencies should also provide a delineation of the portion of the scope of work for which each of these professionals will be responsible.

Consultants/Consultancies are required to submit three (3) electronic copies of their Proposal to: slove@oncat.ca

Please ensure the subject line reads as follows: "ONCAT Review of Information Technology Services: [Company Name]".
ONCAT will accept Proposals on or before the closing date and time of September 25 at 11:00 p.m. Eastern Standard Time.

Proposals shall be irrevocable for any reason for a period of not less than sixty (60) calendar days following the closing date.

All Proposals submitted to ONCAT under this RFP document become the property of ONCAT. ONCAT can decide to not proceed with these activities.

Evaluation Process

The evaluation process will include several stages. ONCAT reserves the right in its sole discretion to defer presenting any award or to cancel this proposal process at any time without providing reasons for such cancellation.

Stage 1 - Mandatory Requirements
Proposals will be reviewed for mandatory requirements and general compliance with the submission proposal requirements. Submissions that do not meet the mandatory requirements will be disqualified.

Stage 2 - Rank the Evaluation

The Evaluation Committee will evaluate and rank the written Proposals, to identify the top-ranked Consultant/Consultancy(s) to be invited to the presentation stage.

Stage 3 - Selection

The Evaluation Committee will complete the evaluation template, rank the proposals and presentations then select the preferred Consultant/ Consultancy(s). Consultant/ Consultancy(s) may be called in for an interview.

Stage 4 – Negotiation

Prior to award, ONCAT may negotiate changes to the scope of services (including pricing to meet budget) with Consultant/ Consultancy(s) identified in Stage 3 for the "best value" option.

References may be contacted. Reference checks will be kept confidential.

Stage 5 - Notice of Award

The successful Consultant/Consultancy will be notified in writing. All unsuccessful Consultant/ Consultancy(s) will be notified after a final agreement has been executed.

Evaluation Criteria Weighting

OVERALL EXPERIENCE OF CONSULTANT/CONSULTANCY & DEMONSTRATED RESULTS Our evaluation will include an assessment of your experience as it relates to the requirements within this RFP, evidence of past performance, quality and relevance of past work, references, and related areas	40%
APPROACH TO THE REVIEW Overall approach and strategy described/outlined in the proposal and firm capacity to perform the engagement within the specified timeframe (prior experience in meeting timelines will be factored in here)	30%
BUDGET APPROACH/COST EFFECTIVENESS Effective and efficient delivery of quality services is demonstrated in relation to the budget allocation. The allocation is reasonable and appropriate.	20%
QUALIFICATIONS OF PERSONNEL Our evaluation will include an assessment of the qualifications and experience of your managerial team, staff, subcontractors, and related personnel.	10%

Timelines & Awards

The work is expected to begin as soon as the award is made.

Project Timelines	
RFP Release Date	August 6, 2019
Basic IT infrastructure document available upon request (email nisber@oncat.ca for more information)	August 6th to September 24th
Written Questions Due (email slove@oncat.ca)	September 13 at 4:00 p.m. Eastern Standard Time
Proposal Deadline	September 25 at 11:00 p.m. Eastern Standard Time
Evaluation	September 26 to October 11
Selection and Negotiation	Week of October 14
Notice of Award	Week of October 21