REQUEST FOR QUOTE

SharePoint Phase 2

CLOSING DATE:
December 13th 2021 5:00PM (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:
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dchan@oncat.ca

MAIN (CORPORATE) WEBSITE:
www.ONCAT.ca

STUDENT-FACING WEBSITE:
www.ONTransfer.ca

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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. As a provincial not-for-profit organization, primarily funded by the Ministry of Colleges and Universities (MCU), ONCAT works alongside our members and stakeholders, 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

For general information about ONCAT, please visit www.ONCAT.ca. For more information on the student portal, visit www.ONTransfer.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 quote to provide general SharePoint and Microsoft 365 services including implementation support, training of ONCAT's SharePoint administrators in establishing best practices and additional support as outlined in the "RFQ - Responsibilities and Deliverables" section.
- ONCAT's goal is to ensure the most efficient and secure technology, and support is in place as we continue developing SharePoint and Microsoft 365 to expand our engagement to stakeholders and improve internal and external operational efficiency.
- Our intent is to fulfill our immediate needs and to have further projects which will be defined through Follow-On Agreements or Scopes of Work in the future.

Project Overview

As ONCAT has matured and grown as an organization we require a SharePoint Community to ensure operational effectiveness and successful future engagement with stakeholders.

ONCAT worked with a SharePoint provider on Phase 1 implementation to develop four SharePoint Online sites. web part. The scope of Phase 1 included designing and configuring a template for internal/external SharePoint sites, adding users to the SharePoint sites, configuring customized groups and permissions for internal and external users, training ONCAT staff to be administrators, design of libraries and their metadata, PowerShell scripting, and supporting web part implementation. This SharePoint implementation replaced a Facebook Workplace solution that supported internal and external collaboration.

ONCAT SharePoint Online implementation includes one hub and three spoke sites. They are accessed by internal ONCAT users and external partner users (Azure Active Directory guests). Users have been assigned library access and permission levels based on customized SharePoint security groups. ONCAT is not currently supported by a SharePoint developer.

ONCAT is supported by a third-party IT service provider, Asurtec Technology Solutions, who manages and supports ONCAT's Microsoft 365 tenant, file server, firewall, networking, and help desk needs. We use Microsoft 365 Business Standard licenses. ONCAT has less than 25 employees and collaborates with 50+ postsecondary education sector partners across Ontario.

RFQ Responsibilities and Deliverables

ONCAT requires SharePoint Services for a 3 (three) month period with the possibility to extend to an annual contract. ONCAT reserves the right to terminate this agreement after giving 30 days notice if needed.

The main responsibilities of the selected SharePoint developer will include:

Immediate needs: (_aim to be completed within the initial 3 (three) month work period)_

- Configure one Yammer instance in ONCAT's Microsoft 365 environment.
- Setup and configure Yammer web part for one SharePoint spoke site.
- Populate internal (members) and external (guest) users for the SharePoint web part for Yammer.
- Provide training for the ONCAT administrators in implementing Yammer:
    - What decisions we may have to make to configure Yammer to our needs.
    - How to populate users onto this web part.
    - How to set up Yammer with a group of users.
    - The best practices to adding Yammer to future SharePoint sites as needed.

Future needs:

- Ongoing troubleshooting and maintenance support.
- Provide ongoing recommendations on the implementation of additional SharePoint spoke sites and web parts to complement our current SharePoint Hub and spokes.
- Provide ongoing recommendations for streamlined and efficient processes to support account management for our sector collaborators.

- Assist ONCAT with setting up internal ONCAT intranet SharePoint site.
- Support ONCAT throughout their Phase 2 SharePoint implementation of adding additional spoke sites, libraries, user database management and other SharePoint features for 50+ sector partners.
- Develop additional SharePoint IT data and cybersecurity protocols as needed.

SharePoint Phase 2 Quote Requirements

Quotes must at a minimum contain the following:

1. **A detailed project plan** for the "immediate" needs described above, including training, user stories implementation, QA, and proposed implementation timeline.

2. **A detailed budget** covering "immediate" needs described above.

3. **Key Contacts.** Include applicant's 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.

4. **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.

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

6. A **description of the outcome monitoring** including a list of tools to track progress, to ensure a success IT transition.

7. **Technical definitions** if required.

Communication

All communication such as 1) requests for additional information, 2) clarification, 3) request for a French version, please direct in writing by email to: dchan@oncat.ca

> All such RFQ related inquiries must be received no later than December 13th at 5:00 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 vendors.

Submission Process

1. Please review all sections of this RFQ carefully and follow all instructions. Incomplete submissions will be not be considered.
2. All costs associated with developing or submitting a quote (including an interview) in response to this RFQ and/or in providing any additional information, which ONCAT considers necessary to evaluate the Proposal shall be borne by the IT Service Provider. ONCAT assumes no responsibility for such costs.
3. All pricing submitted will be considered fixed unless otherwise indicated herein.
4. All proposals should identify the IT Service Provider 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.

Service Providers are required to submit one (1) electronic copies of their RFQ Submission to: dchan@oncat.ca

Please ensure the subject line reads as follows: "SharePoint Phase 2: [Company Name]".
ONCAT will accept Proposals on or before the closing date and time of December 13th at 5:00 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 RFQ 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.   One evaluation criteria is that considerations will be given to organizations who have experience working with non-profit government organizations.

Stage 1 - Mandatory Requirements
Proposals will be reviewed for mandatory requirements and general compliance with the submission 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 IT Services Provider 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 IT Services Provider 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 IT Service Provider.

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

Stage 5 - Notice of Award
The successful IT Service Provider will be notified in writing. All unsuccessful IT Service Provider submission will be notified after a final agreement has been executed.

Evaluation Criteria Weighting

OVERALL EXPERIENCE OF IT SERVICE PROVIDER & DEMONSTRATED RESULTS Our evaluation will include an assessment of your experience as it relates to the requirements within this RFQ, evidence of past performance, quality and relevance of past work, references, and related areas. Consideration will be given to organizations with experience working with non-profit government organizations.	50%
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.	30%
QUALIFICATIONS OF PERSONNEL Our evaluation will include an assessment of the qualifications and experience of your managerial team, staff, subcontractors, and related personnel.	20%

Timelines & Awards

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

Project Timelines	
RFQ Release Date	November 24th, 2021
Proposal Deadline	December 13th
Evaluation and Selection	Week of December 13th
Notice of Award	Early week of December 20th