

<b>RFP Title:</b>	13-14 RFP – RESEARCH 3 – EXCESS CREDITS – OCTOBER 31, 2013
<b>Assignment Summary:</b>	ONCAT is looking to fund research on assessing the value of the excess credits transfer students carry upon graduation. This is a multi-phase study involving administrative (student-level) data.
<b>Issue Date of RFP:</b>	OCTOBER 31, 2013
<b>Proposal Submission Deadline/Time:</b>	NOVEMBER 29, 2013
<b>ONCAT Contact for Enquiries Regarding RFP:</b>	Glenn Craney, Executive Director Ontario Council on Articulation and Transfer 180 Dundas Street West, Suite 1902 Toronto, ON M5G 1Z8  (416) 640-6951, Ext. 301 email - gcraney@oncat.ca
<b>Title of Proposed Project:</b>	Max. 15 words
<b>Description of Proposed Project:</b>	Max. 50 words

<b>CONTACT INFORMATION:</b>	
<b>Organization/Company/Institution:</b>	
<b>Primary Contact – Name and Title:</b>	
<b>Primary Contact – Full Mailing Address &amp; Email Address:</b>	
<b>Primary Contact – Phone Number and Extension:</b>	
<b>Name(s)/Title(s)/Contact Information of Project Co-Leads: (if applicable)</b>	

### **A.1 About ONCAT**

Established in 2011, the Ontario Council on Articulation and Transfer (ONCAT) was created to enhance student pathways and reduce barriers for students looking to transfer among Ontario's 44 publicly funded postsecondary institutions. ONCAT works with its members – all publicly funded postsecondary institutions – to enable the system to develop as rapidly as possible, while also respecting institutional autonomy.

The following is the provincial government of Ontario's vision for credit transfer:

*Ontario will have a comprehensive, transparent and consistently applied credit transfer system that will improve student pathways and mobility, support student success and make Ontario a postsecondary education destination of choice. The credit transfer system will assist qualified students to move between postsecondary institutions or programs without repeating prior, relevant learning.*

The government believes realizing this vision will make it easier for students to navigate the postsecondary education system, reach their preferred educational destination faster and enter or re-enter the labour market sooner.

As of July 2013, ONCAT and its member institutions has already accomplished much: Ontario boasts approximately 630 student transfer pathways in six broad program clusters (Applied Arts, Liberal Arts & Humanities, Business & Commerce, Health Sciences & Applied Health, Engineering & Technology, Social Sciences & Services, and Sciences & Applied Sciences); a greater understanding of the student transfer experience through funded research initiatives; enhanced information for students; and better data collection mechanisms. These are all critical to helping achieve enhanced transparency, accountability and greater mobility for students seeking to move between institutions.

### **A.2 Description/Background of Assignment**

The establishment of ONCAT represents the provincial government's very strong commitment to creating a more comprehensive and transparent system of credit transfer and pathways for students in the province's colleges and universities.

As college and university enrolment grows and the need for Ontario's future workforce to obtain post-secondary education continues to be of pressing concern, so too does increases in cost, both to government and to students. It has emerged as a key government priority to contain and 'bend' the postsecondary education cost curve and encourage both colleges and universities to seek out efficiencies and productivity gains.

A central part of ONCAT's work is to better understand the nature of the costs and benefits associated with developing a more robust system of transfer, benefits that would accrue to students, their parents, the government as well as Ontarians in general. As part of that understanding, ONCAT is interested in determining the magnitude of excess credits accumulated upon graduation, in both the transfer and non-transfer learner student populations.

The perceived problem relating to duplicative academic work generated by inconsistent institutional transfer policies and practices – and the related matter of what this costs the system – has led to the impression in some quarters that transfer students carry more excess credits to graduation than do their non-transfer counterparts. This work would seek to begin the process of testing that hypothesis.

### **Guiding Research Questions (overall):**

1. Is the value of excess credits students carry to graduation in the transfer student population, in comparison to their non-transfer counterparts (or in the system on average)?
  - a. Are the differences appreciable? Are there any repercussions with respect to productivity losses in the system? What does this represent in terms of costs to government and students, if any?
  - b. What are the trends in terms of the programs and courses where this accumulation most often occurred?
  - c. What constitute some of the contributing factors to the accumulation of excess credits, if applicable?
2. On the other hand, is there a value to providing students with the opportunity to transfer from one institution to another, and/or from program to program and potentially carry forward excess credits upon graduation, if such a switch and the resulting accumulation of extra credits has increased the likelihood of the learner completing their program?
  - a. How do policy makers value those extra 'costs'?

### **A DESCRIPTION OF THE STUDY**

Ideally, this study would be carried out in several stages, with the notion that the proponent of the first stage of work has successfully completed Phase I would be eligible for support to carry out the work associated with Phase II.

#### **PHASE I:**

**PURPOSE:** To assess the policy discussions that have taken place in other jurisdictions and critically examine how they have resolved the challenge through a literature review and environmental policy scan.

#### **PHASE II:**

**PURPOSE:** To ascertain the average amount of excess credit accumulated at graduation among transfer students in comparison to their non-transfer counterparts; to determine what academic program they are enrolled in as well as credential type.

### **PHASE III:**

**PURPOSE:** To further identify the characteristics of those transfer students who have carried excess credit to graduation; are there any trends in the types of excess course-work?

To answer the questions that are part of Phase II, the successful proponent would identify college and university transfer students, potentially through access to the data owned by the application centres (OUAC and OCAS), and follow up on the administrative records and secure the involvement of a number of interested institutions, who could also ideally commit to annual data pulls to update the data. ONCAT would assist in developing the partnerships and would potentially make available additional funds required on the part of institutions to support IT and data management costs associated with the project, although the successful proponent must demonstrate the extent to which they could ensure the security of the data.

#### ***A.3 Deliverables***

The deliverables would include:

1. An environmental scan.
2. The data points for both the transfer students identified in the analysis of the application data sets and the data pulls provided by the institutional partners.
3. An analysis of the data for the purposes of providing public policy makers with the tools they need to guide the evolving productivity discussions and initiatives.

#### ***A.4 Agreement Terms and Conditions***

Successful proponents will also be expected to enter into a formal agreement with ONCAT, which will outline the terms and conditions of funding.

# PROPOSAL:

## 1) METHODOLOGY:

- Provide a clear and comprehensive explanation of all steps that will be required to complete the project

PROPONENT TO RESPOND

SUGGESTED # OF WORDS: 500-1000

## 2) TOPIC EXPERIENCE:

- Explain how the academic training, qualifications and past experience of the research team are relevant to the research topic of this RFP;
- Include CVs of research team members as an addendum

PROPONENT TO RESPOND

SUGGESTED # OF WORDS: 300-600

## 3) PROJECT MANAGEMENT:

- Outline your plan for ongoing communication and collaboration between the research team, ONCAT and any other partners or collaborators;
- In the Milestones section include due dates, descriptions and payment amounts for your project deliverables. Ensure the timelines, milestones and planned overall approach are realistic for this project

PROPONENT TO RESPOND

SUGGESTED # OF WORDS: 300-600

### DELIVERABLES:

Due Date	Deliverable Description	\$
Due Date	Deliverable Description	\$
Due Date	Deliverable Description	\$

## 4) RESEARCH BUDGET:

Using the information you provide in the *Budget* section, your budget will be evaluated against the following criteria:

- Is the overall budget for this research project realistic?
- Are the various budget components in line with ONCAT policy and past experience?
- Is the proposed work likely to be successfully accomplished within the budget proposed?

TO BE COMPLETED BY ONCAT EVALUATOR

## 5) QUALITY OF RESPONSE:

*Your proposal will be evaluated against the following criteria:*

- Is it clear that the proponents have understood the objective of the original RFP and responded accordingly?
- Is the proposal written in a way that is easy to comprehend and evaluate?

TO BE COMPLETED BY ONCAT EVALUATOR

**RESEARCH BUDGET:**

Please include ALL anticipated costs for the project, including in-kind\* and other costs (*in italics and without bold*) for which ONCAT funding is being requested.

- We recommend, where applicable, that proposals include estimates of the per day/semester costs for faculty/senior administrators that are providing “in-kind” support to the research project, as well as any other contributions being made to the research by your institution. This will allow us to have a better sense of the “true cost” of the overall research project, and the contribution that is being made by the college/university and their personnel.

**PERSONNEL:**

Name of Proposed Team Members (insert additional rows if necessary)	Title/Position	# of Days/ Semesters	Per Day/ Semester Rate	Total: # x Rate
			\$	\$
			\$	\$
			\$	\$
<b>Personnel Costs Subtotal</b>				\$

**DIRECT COSTS:**

Detailed Description of Direct Costs (if applicable) (insert additional rows if necessary)	Cost
	\$
	\$
	\$
<b>Direct Costs Subtotal</b>	\$

**TRAVEL AND ACCOMMODATION:**

Detailed Description of Travel and Accommodation (if applicable) (insert additional rows if necessary)	Cost
	\$
	\$
	\$
<b>Travel and Accommodation Subtotal</b>	\$

<b>OVERHEAD:</b>	
<b>A detailed description of what constitutes overhead must be provided (if applicable)</b> <i>(insert additional rows if necessary)</i>	<b>Cost</b>
	\$
	\$
	\$
<b>Overhead Subtotal</b>	\$

<b>FUNDING:</b>	
<b>Personnel Costs Subtotal</b>	\$
<b>Direct Costs Subtotal (if applicable)</b>	\$
<b>Travel and Accommodation Subtotal (if applicable)</b>	\$
<b>10% of Overhead Total (if applicable)</b>	\$
<b>Firm Fixed Price (ONCAT Funding)</b>	\$
<b>HST (13%) (if applicable)</b>	\$
<b>Total ONCAT Funding (Firm fixed price + HST)</b>	\$
<b>In Kind Contribution</b>	\$
<b>Total Project Cost (Total ONCAT Funding + In Kind)</b>	\$

<b>SIGNATURES:</b>	
<p><b>Conflict of Interest:</b></p> <p>Affirmation that neither the vendor nor the staff have any real life or perceived conflict of interest in performing the assignment</p>	<hr/> <p>Signature of Principal Investigator or Official Representative of Vendor Institution/Organization</p>
<p><b>Vendor's Signature of Offer:</b></p> <p>Affirmation by an individual with the authority to bind the "supplier" institution/organization</p>	<hr/> <p>Signature of Official Representative of Vendor Institution/Organization</p> <hr/> <p><i>Name, Title and Legal Name of Vendor Institution/Organization</i></p>