ONCAT ● caton

Ontario Council on Articulation and Transfer

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www.oncat.ca

REQUEST FOR PROPOSAL

POSTSECONDARY INSTITUTIONAL TRANSFER PROCESS MAPPING

CLOSING DATE:
September 18, 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 (ONCAT)

CONTACT:
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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 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.

View Principles for Credit Transfer

Project Overview

At some point in a student's academic career, they may decide to transfer out of their current post-secondary institution (PSI) to another. Students transfer for a variety of reasons including geographic relocation, personal or financial challenges, change in career trajectory and/or desired change in program or field of study. According to a recent study led by e-Campus Ontario's Student Mobility Design Lab [*see Student Mobility Final Report*] and supported by ONCAT, the student experience in transfer includes a number of stages categorized in three main areas: information seeking (realizing and researching), preparing (applying, transferring credits, accepting offer) and transferring (adapting).

ONCAT is interested in documenting the current state of transfer processes at PSIs (i.e. publicly assisted colleges, universities and Indigenous Institutes in Ontario) from the student perspective. We want to record the step-by-step process students have to take in order to transfer from one postsecondary institution to another, and have their credits/courses assessed and recognized as part of this transfer process (ie. credit transfer processes). We want to understand how these processes are similar and different across institutions.

Because PSIs are so unique in how they offer and deliver transfer activities, the more information we can gather on current processes helps ONCAT identify key gaps that create barriers for students as they move from one institution to another. Identifying these gaps can inform the development and sharing of interventions and best practices that reduce barriers and support the reality of the mobile student in the Ontario system.

Invitation

ONCAT's goal is **to define the current state of the student journey** in transferring in and out of a specific institution. This could include how prior courses and/or credentials are assessed by the institution a student is transferring to (receiving institution), whether they receive advanced standing or course exemptions, and when students find out the outcomes of their transfer request.

ONCAT is seeking an experienced Consultant/Consultancy to identity what is and is not currently working for transfer students in order to support a future state model that preserves what is working while reducing the duplication of existing issues. The intention is to develop a comprehensive resource with documented processes for the selected PSIs that can be used 1) document best practices so that learnings that can be replicated and implemented by other institutions across the sector; and 2) help inform future updates on ontransfer.ca.

Key questions for consideration may include:

1. How/when does a student apply for transfer credit?
2. Who/what are the student's first point of contact and what are their roles in the process?
3. How long is the process time for acceptance/non-acceptance?
4. What staff/departments are involved?
5. What information systems are involved?
6. What are the non-value added activities in this process that could be eliminated?
7. Where are the bottlenecks?
8. What fees, if any, do students pay?
9. What documents are students required to submit to institutions (course outline, etc.)
10. What are the baselines and metrics to measure improvement and success?

Scope of Work

The selected Consultant/Consultancy will undertake the following:

1. Leading **an introductory training/information session** of all participating institutions outlining the goals and expectations of the process and what the selected institutions will need to prepare
2. Planning and facilitating **process improvement sessions**. The sessions may be completed over multiple weeks; the Consultant/Consultancy in consultation with ONCAT will determine the schedule.
3. A **Current State Map** of the participating institutions showing what the process looks like today, including in-depth analysis of value-added and non-value added activities
4. A **Gap analysis** to identify action items and a timeline to move from the current state to the future state;
5. A **comprehensive documentation of the entire review process** of each participating institution including a listing of specific and measurable possible improvements (if applicable);

6. An **environmental scan** of best practices in transfer from other jurisdictions.

Please note: PSIs will submit proposals directly to ONCAT for these activities and depending on the size and scope of the institutions submitting proposals the number of institutions selected for the Pilot may differ. PSIs have not yet been selected.

Communication

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

cpoplak@oncat.ca

All such RFP related inquiries must be received no later than the September 6 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 Consultant/Consultancys.

Submission Process

1. Please review all sections of this RFP carefully and follow instructions. Incomplete submissions will be not be considered.
2. 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.
3. 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.
4. All pricing submitted will be considered fixed unless otherwise indicated herein.
5. 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.
6. Please advise if you are able to work in both English and French. This will be considered an asset.

Consultant/Consultancy is required to submit one (1) electronic copy of their Proposal to: cpoplak@oncat.ca

Please ensure the subject line reads as follows: "ONCAT Process Mapping Proposal: [Company Name]".
ONCAT will accept Proposals on or before the closing date and time of September 18 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.

Proposal Requirements

Proposals must at a minimum contain the following:

1. **Contact Information for the respondent**

2. **Description of the proposed approach and work plan**. Activities and timelines should be specific, measurable, achievable, realistic, and time-oriented. Include a timeline of major tasks and milestones.

3. **A detailed Budget.**

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

5. **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.

6. Provide **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 application

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 may be disqualified.

Stage 2 - Rank the Evaluation

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

Stage 3 - Selection
The Evaluation Committee will complete the evaluation template, rank the proposals and select the preferred Consultant/Consultancy(s). Consultant/Consultancys 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/Consultancys 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	30%
QUALIFICATIONS OF PERSONNEL Our evaluation will include an assessment of the qualifications and experience of your managerial team, staff, subcontractors, and related personal.	20%
APPROACH TO THE PILOT Overall approach and strategy described/outlined in the proposal and firm capacity to perform the engagement within the specified timeframe (prior experience of the firm in meeting timelines will be factored in here) as well as the quality and creativity of the proposed strategies	20%
POST-SECONDARY SECTOR KNOWLEDGE Assessment of Consultant/Consultancy's knowledge of the complexities and functioning of PSIs and the post-secondary landscape will be taken into consideration here.	10%
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%

Timelines & Awards

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

Project Timelines	
RFP Release Date	July 31, 2019
Written Questions Due	September 6 at 4:00 p.m. Eastern Standard Time
Proposal Deadline	September 18 at 11:00 p.m. Eastern Standard Time
Evaluation	September 18 to September 25
Selection and Negotiation	Week of October 1
Notice of Award	Week of October 1