Ontario Council on Articulation and Transfer

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www.oncat.ca

REQUEST FOR QUOTE

IT Service Provider

CLOSING DATE:
March 16th 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

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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 quote to provide general IT services including help desk support, establishing an independent network for file storage, disaster recovery, antivirus, VPN 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 transition from our current IT provider and expand our reach to stakeholders and improve internal and external operational efficiency.

Project Overview

ONCAT was established in 2011 as a provincial not-for-profit organization and is primarily funded by the Ministry of Colleges and Universities (MCU). As ONCAT has matured and grown as an organization we require an IT Infrastructure to ensure operational effectiveness and successful future administrative system integration. ONCAT is currently completing an evaluation of our IT infrastructure and have an immediate need to establish our own network and IT capacity.

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

ONCAT is currently using mostly up to date software, with good practices for security of the environment across all areas including the network, workstations and servers; however we need to transition from our current IT Services provider. 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 was supported by the Council of Ontario Universities (COU) who are also located at 180 Dundas West in Toronto. COU will support the transition of IT Services to the selected IT vendor. In 2018, COU hired a third-party consultant to conduct a network vulnerability assessment and penetration testing. Moving forward COU will no longer be able to provide IT services due to staffing changes.

RFQ Responsibilities and Deliverables

ONCAT requires IT Services for a 6 (six) month period with the possibility to extend to an annual contract..

The main responsibilities of the selected IT provider will include:

Immediate needs:

- Work with the current IT service provider (COU) over a 30 day transition period to implement the transfer of IT responsibilities and services
- Through the transition:
    - Manage admin/user accounts and restrict access to regular accounts per industry standards.
    - Troubleshoot any issues with hardware or software.
    - Troubleshoot phone system and any anti-virus issues and train staff on best practices.
    - Troubleshoot first level network issues and escalate with ISP (Internet Service Provider) as needed.
    - Setup and troubleshoot any printer issues.
    - Setup, maintain and troubleshoot WIFI access points issues.
    - Coordinate and oversee the installation of cabling.
    - Oversee the purchasing and installation of hardware.
    - Help install/uninstall software.
    - Ensure new access accounts are created for all onboarding staff.
    - Train new and existing staff on the new technologies as needed.
- Manage and prepare computers for new staff, including installing necessary standard software like Office Suite, Endpoint protection and Directory services.
- Help procure any accessories, software or hardware needed in the future.
- Repair hardware if possible or engage in securing new hardware.

- Procure and oversee the installation of new internet services (Rogers, Bell, Telus).
- Procure and oversee secure server hosting and VPN services.

Upcoming needs:

- Provide ongoing recommendations on the procurement of computers from qualified vendors.
- Office 365 for OneDrive (Files) and to migrate from Intermedia emails.
- Support ONCAT through a full migration to MS Office 365.
- Assist ONCAT with establishing an onsite server for highly confidential files and data.
- Develop additional IT protocols as needed.

COU's Transitional Responsibilities

Prior to transitioning to the new IT Service Provider, COU will provide the following support:

- Uninstall antivirus software from desktops and laptops.
- Unjoin all computers from COU's network.
- Remove 2 wireless access points from firewall and make standalone.
- Uninstall VPN client.
- Disconnect 2 network cables (Internet and Network access) from ONCAT to firewall.
- Remove Windows Update centralized configuration.
- Migrate Shared Files to OneDrive or other service provider of choice.

IT Service Provider Quote Requirements

Quotes must at a minimum contain the following:

1. **A detailed budget** covering "immediate" and "upcoming" needs described above. These two quotes should be separate.

2. **Key Contacts.** Include applicants 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.

3. **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.

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

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

6. **Technical definitions** if required.

Communication

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

> All such RFP related inquiries must be received no later than March 16th 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: communications@oncat.ca

> Please ensure the subject line reads as follows: "IT Service Provider: [Company Name]". ONCAT will accept Proposals on or before the closing date and time of March 16th 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.

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	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	March 9th, 2020
Proposal Deadline	March 16th
Evaluation	March 17th
Selection and Negotiation	March 18th
Notice of Award	March 19th

Appendix: ONCAT's Current IT Infrastructure & Administrative Software Overview

ONCAT's Staff

Under 20 employees (full-time, part-time, short-term contract / internships)

Email Provider

Provided by Intermedia. Has a 10GB limit per mailbox. Email could contain sensitive and private information, and a Canadian equivalent service may be preferable.

Operating System

ONCAT has all monitored systems running a combination of Windows 8 and 10. This ensures easy supports and good knowledge sharing.

Productivity Suite

ONCAT is standardized on Microsoft Office 2016 (18 workstations) with a few Office 2010 and 2013. Having most users on the same version of office helps troubleshooting and knowledge sharing.

Windows Updates

Council of Ontario Universities (COU) monitors desktops and laptops and ensures operating system security and Microsoft Office patches and are installed in a timely fashion.

COU implements best practices for pushing updates to workstations on a timely basis

File Server

COU provides space on a network drive that is accessible to all ONCAT employees. Limited access folders are also available for sensitive financial and HR-related information. Off-site access to network files is available via VPN.

Files on the network drive are backed up 4 times per hour and backup files are also stored off site.

A disaster recovery plan is in place using remote servers. Once a year, the remote backup site is tested.

Anti-virus

Sophos is deployed on all ONCAT workstations and laptops and is centrally managed by COU's server.

Helpdesk

Helpdesk software (SolarWinds Web Help Desk) is used by COU to track calls and incidents

Networking

A 1 Gbps internet connection is available for COU and ONCAT. COU has implemented bandwidth usage and monitoring, as well as prioritization for video-conferencing. Additionally, COU manages ONCAT's WIFI that runs throughout the office using two wireless Access Points.

Firewall

A firewall (Dell SonicWall) with Intrusion Protection (IPS), anti-malware, anti-virus, and more is deployed to secure the ONCAT and COU networks, deployed on different subnets.

Sage

Sage 300cloud is the accounting software used to process the AP, AR, EFT, Bank & GL. The software is hosted by a third-party (Equation Technologies). ONCAT uses the AP module for processing invoices and EFT Module for remitting payments to the bank. The AR is not used frequently due to the nature of ONCAT's business. The Bank module is used to enter bank transactions (which are few) and bank reconciliation while the GL module is used for updating the sub ledgers and monthly entries.

ONCAT purchased three Sage licenses but every year ONCAT pays for the EFT update module to Sage group and also pays annual hosting fees to Equation Technologies.

Payworks

Payworks is the third-party software we use to process payroll. We have an account rep who is attached to our file and helps us when we encounter issues. ONCAT only uses pay works for payroll, T4 and ROE processing plus statutory deduction remittance. ONCAT is interested in expanding Payworks in 2020 to include absence management.

Survey Monkey Teams and Mail Chimp

ONCAT conducts dozens of surveys annually and uses Mail Chimp to distribute a quarterly e-newsletter.

Grants Management Software - Survey Monkey Apply to Foundant

ONCAT has used Survey Monkey apply and in 2019 is transitioning to a new Grant Portal, offered through Foundant (https://grantmakers.foundant.com). Foundant appears to be easier to navigate and will hold organizational contacts and project lead contacts, all documents related to a project (proposal, signed contracts, reports). Foundant will replace some of our shared drive filing processes and hard files, as everything will be accessible in the portal. Foundant does not currently integrate with Sage which was not a requirement of the system.

Additional Administrative Software

CRM is desirable (Customer/Client/Partner Relationship Management system) to provide efficiencies in maintaining mailing lists, creating campaigns, managing user consent and preferences. Individual emails and lists are being managed by different individuals today in various systems (grants, MailChimp, Excel). It is difficult to ensure accuracy and time consuming. It would be desirable for all staff to access the CRM.

No HR software is currently being utilized with under 20 full-time and contract staff. Staff absences and time are currently tracked manually through Excel spreadsheets.