



**REQUEST FOR PROPOSALS NO: MR2024**

**PHASE ONE POST- SECONDARY EDUCATION STRATEGIC INSIGHT RESEARCH**

**ISSUED: APRIL 15, 2024**

**PROPOSAL SUBMISSION DEADLINE: MAY 6, 2024 BY NOON**

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## **PURPOSE**

Ontario's 24 Public Colleges are the province's most affordable and accessible avenue to post-secondary education and training. They operate in 200 locations serving local and regional labour markets across Ontario – in many small communities, these Colleges are the only access point for further education and training for thousands of Ontarians. Public Colleges are purpose-built to prepare students for the labour market.

College students in Ontario are also very different from University students – average age is 23, 70% of students are not directly from High School, at Colleges outside Toronto, 60% of students are local to their community college.

For Ontarians, the average domestic diploma tuition in Ontario is the second lowest in Canada at just \$2,700 annually. In contrast, Ontario Universities have the third highest tuition in the country, roughly averaging \$8,100 per year. Ontario has the absolute lowest level of domestic per-student College funding in Canada and is the only jurisdiction that operates with less than \$10,000 in average tuition and government funding, which is significantly below the cost of delivery.

Despite this affordability and access, domestic enrollment has been in decline for a decade, and Colleges have lost market share to Universities. Ontario Colleges, via their member association Colleges Ontario, are undertaking an RFP to select a research firm that it can ideally partner with long-term, to implement a multi-phased research process. Colleges Ontario envisages that Phase One of this process will start with quantitative research designed to understand the Ontario public's needs and wants in terms of post-secondary education and, to assess perceptions of its Brand within this highly competitive sector. These consumer insights will inform the direction that Colleges Ontario requires to innovate and to optimize the value proposition it delivers to those Consumer groups who provide potential for growth. Strategies will be tested before being integrated into any marketing and recruitment campaigns implemented by Colleges Ontario and its members to increase domestic student enrollment. Insights can also be leveraged and as appropriate, incorporated into advocacy initiatives that Colleges Ontario leads on behalf of its members with its government partners to ensure the sustainability of the Public College system. As we launch a new public affairs strategy, Colleges Ontario sees opportunities for synergies between consumer insights and public opinion polling.

## **PART 1 – INTRODUCTION**

### **1.1 Invitation to Proponents**

This Request for Proposal (“RFP”) is an open invitation to prospective Proponents to submit proposals for the provision of research services to provide the first phase of what is anticipated to be a multi-year research initiative. The overall goal of the research is to provide Colleges Ontario <https://www.collegesontario.org/en> and its members with the foundational strategic insights they require to identify opportunities to innovate and to support marketing and recruitment strategies and advocacy aimed at increasing domestic student enrollment in the provinces 24 Public Colleges.

Colleges Ontario is seeking to establish a relationship with a research firm to address short-term deliverables (“The Deliverables”) described in Part 2. Colleges Ontario will enter into a written agreement with the selected Proponent for the provision of Phase One of the Deliverables. The term of the agreement will be determined by the timeline required for Phase One.

### **1.2 RFP Process Overview**

This RFP will be undertaken in two steps. The first step will require that all Proponents submit a written response to the questions outlined in Part 6 – Proposal Requirements and Guidelines. Colleges Ontario will review all written proposals and will use the information contained in each submission to select a short-list of 2-3 Proponents who will be interviewed in-person by Colleges Ontario. A standard list of questions will be prepared and asked of all short-listed Proponents to guide each 90-minute interview.

### **1.3 Definitions**

Unless otherwise specified in this RFP, capitalized words and phrases have the following meaning:

**“Brand”** is used to describe the unique benefit(s) that Consumers and Potential Consumers (see below) can consistently expect to receive when they consider applying to one or more of Ontario’s Public Colleges. In sum, these benefits will differentiate Public Colleges from competitors and compel more Consumers to apply.

**“Colleges Ontario”** means the Association representing the twenty-four (24) public Colleges of Applied Arts and Technology in Ontario which includes two French-speaking institutions.

**“Conflict of interest”** means the Respondent affirms that under contract they can perform their duties impartially and objectively free from other interests or obligations.

**“Consumer or Potential Consumer”** means all those persons or groups who may consider post-secondary education as a life choice and that may be audiences of interest to Colleges Ontario in terms of the execution of The Deliverables.

**“Days”** means calendar days and **“days”** has the same meaning.

**“Direct Student** is a Consumer or Potential Consumer who is 18 or 19 years of age and may enroll in a post-secondary education directly after graduating from High School; where as **“Non-Direct Students”** are 20+ years of age and are Consumers or Potential Consumers who have chosen to take one or more years away from post-secondary education post High School.

**“Deliverables”** means the tangible or intangible goods or services produced as an output from this project, see Phase One as outlined in Part 2.

**“Domestic Students”** refer to those students from the province of Ontario.

**“HALO Brand Leadership or HALO”** is the third-party independent entity tasked with project management, monitoring, evaluating the selected Proponent ensuring compliance with agreed standards and who will report findings to the relevant Colleges Ontario stakeholders.

**“Member”** – one of the 24 Public Colleges that is a member of Colleges Ontario, the provincial member association.

**“Must,” “mandatory” or “required”** means a requirement be met for the proposal to receive consideration.

**“OCAS” or “Ontario College Application System’** is a sector related entity to Colleges Ontario and where its applicant database could be used in the research design for this initiative.

**“Proponent”** means an individual or company that submits, or intends to submit, a proposal in response to this Request for Proposal.

**“Public”** is used interchangeably with Consumer and Potential Consumer of post-secondary education.

**“Trading Area”** means the local region that each of the member Colleges primarily recruit students from.

## 1.4 Contact

**Name:** Cameron Clairmont  
**Title:** Chief Administrative Officer  
**Email:** [clairmont@collegesontario.org](mailto:clairmont@collegesontario.org)

**Colleges Ontario**  
**130 Queens Quay East**  
**West Tower, Suite 606**  
**Toronto, Ontario M5A 0P6**

## **PART 2 – THE DELIVERABLES**

### **2.1 Project Title**

Post-Secondary Education Strategic Insight Research

### **2.2 Overview**

The purpose of the research and the role of the selected Proponent in Phase One is to augment Colleges Ontario and HALO Brand Leadership by providing the information and data required to understand the critical dynamics that are currently shaping the post-secondary education sector. Upon receiving the key findings of the research, Colleges Ontario and HALO working jointly with the selected Proponent will identify the actionable insights that will provide the Public College system as a whole and each of its 24 members with the foundation required to begin to inform strategic decision-making regarding possible future sector innovations, marketing and recruitment campaigns and, advocacy strategies recognizing Colleges Ontario's role with both provincial and federal governments. As well, Phase One will serve to provide Colleges Ontario with a path forward as additional research will likely be required to both prioritize and optimize future strategic initiatives to effectively address Colleges Ontario's goal of increasing domestic student enrollment in Public Colleges and building public reputation.

The most important objective of Phase One research is to provide actionable insights for members to support their recruitment and enrollment and retention.

Colleges Ontario is initially seeking proposals from interested Proponents for Phase One as outlined above. Prospective proponents will need to demonstrate the ability to provide the specific project Deliverables noted below in Part 2.3 as well as address other service expectations that Colleges Ontario has of its selected research partner in Part 2.4. Based on the quality of submissions, a short-list of Proponents will be selected to participate in the second stage of the RFP which will include in-person meetings with Colleges Ontario.

### **2.3 Project Deliverables**

- Recommend and implement the optimal research design for Phase One.
- Access and survey quantitative samples of 8-10 (and possibly more) unique Consumer or Potential Consumer groups from its own sources and from those of Ontario Colleges Application Services (OCAS), <https://www.ocas.ca>.
- Supplement quantitative surveys with qualitative research of select samples, if/as required.
- Address the specific regional interests of each of the 24 Public Colleges – to the extent possible.
- Develop custom questionnaires that will enable Colleges Ontario to explore common and unique areas of interest with each Consumer or Potential Consumer group.

- Undertake all field work and gather all technical data required for statistical analysis and for preparation of tables for presentations.
- Demonstrate how any proprietary tools that your research company may have could deepen understanding of the data and information sourced in Phase One.
- Demonstrate measures that show how your research company is cost-effective.
- Bring relevant/sector expertise to the table to improve the research design being considered for Phase One.
- Demonstrate the strategic implications of key findings as they relate to member's goals of increasing domestic enrollment.
- Bring broader knowledge of environmental, lifestyle, generational, etc., trends to the table that may influence the interpretation of the research findings.
- Identify additional research that Colleges Ontario may wish to consider after Phase One to address information gaps and/or better assess specific dynamics and/or optimize strategies going forward.

## **2.4 Service Expectations**

In addition to the Project Deliverables that pertain to the research, Colleges Ontario is seeking to select a Proponent who:

- Recognizes HALO Brand Leadership's role as the primary point of contact throughout the process and is prepared to use HALO as a sounding board if/as issues arise that may impact the research deliverables and may require College Ontario's input and/or approval. Note that Colleges Ontario has convened an internal steering committee reporting to the President & CEO of Colleges Ontario comprised of senior College marketers from the 24 Colleges to work with HALO.
- Recognizes the potential that OCAS may provide data to cost-effectively source some of the samples required for this research initiative and Proponent agrees to treat any information and data that OCAS provides with the strictest confidence.
- Works as a true collaborator to support Colleges Ontario in meeting the needs of its 24 members. Importantly, this will involve helping individual Colleges understand if there are limitations to the extent to which the data can be cost-effectively sourced while ensuring the validity and reliability of the findings for each College's local Trading Area.
- Brings value-added services and strategic insights to the table to improve the quality of the research design and processes.
- Keeps HALO and Colleges Ontario regularly informed of the research process through systematic and formalized reports such that it provides Colleges Ontario with opportunities to pro-actively seek the input of members so that they are more likely to buy-in to the results of the research.
- Assigns staff that have the technical expertise required to execute the research and who understand and appreciate how to deliver a high level of customer service.

- Can be flexible to meet with Colleges Ontario on as needed/urgent basis so that information it receives that may impact the research design/process can be shared in real time.
- Attends and participates in meetings with both College Presidents and their VP level marketing personnel. Both audiences are keenly aware of the need for this foundational research study but are not likely to all be fully conversant with the technical nature of some aspects of the research process. This, in some instances, may require the selected Proponent to incorporate an informative approach to aspects of its work especially in the presentations it makes to these wider audiences.
- Provides the services required in both English and French recognizing that Colleges Ontario consists of 22 predominantly English-speaking colleges and two predominantly French-speaking members.

## **PART 3 - Background and Post-Secondary Education Landscape**

### **3.1 Colleges Ontario Mission**

Colleges Ontario's purpose is to advance the important role that its network of 24 member Colleges delivers in preparing qualified students to enter the workforce. In this regard, Colleges Ontario is an integral part of our growing and vibrant provincial economy. In its role, College Ontario serves as the 'voice' of Public Colleges advocating on behalf of the system to provincial and federal governments. Also, Colleges Ontario creates and executes marketing and advertising campaigns that raise public awareness of the benefits associated with the Public College Brand and, to build interest amongst Potential Students and their parents to apply to a College. In turn, each of the 24 member Colleges undertake marketing and advertising campaigns to build demand for their own Brand in their local Trading Area and increasingly, outside of their Trading Area.

### **3.2 2023 Internal Partner Audit**

Colleges Ontario decided to suspend its advertising initiative following the 2022 campaign to review its strategy. In 2023 Colleges Ontario undertook an objective audit of its partners led by HALO to assess perspectives including the role of Colleges Ontario in system-wide marketing to the public. The audit found that the effectiveness of past advertising was questionable, and HALO concluded that there was no clear consensus as to the way forward. Most participants had developed a preferred strategic approach to marketing based on their own experiences in their local Trading Area. HALO identified that important information was missing about the Consumer for post-secondary education and, until that information was known and understood, decisions regarding future strategy and innovation should not be made. In November 2023, Colleges Ontario approved the recommendation to undertake Consumer insight research to provide the foundation required to base future strategy and innovation upon. Quantitative research was recommended as the next phase to answer questions fundamental to building successful marketing and recruitment campaigns, and advocacy strategies including:

- What does the public care about when it comes to post-secondary education?
- Where does the public currently think Public Colleges 'fit' in the post-secondary education landscape in relation to Universities, For-Profit Colleges?
- What does the public know about Public Colleges and what they can offer that is unique and differentiates Colleges from Universities and For-Profit Colleges?
- What does the public think about the potential value of what Public Colleges can offer?
- Is there a specific Consumer or Potential Consumer group or groups that is more likely to consider what Public Colleges can offer? If so, what messages and/or changes in the way Colleges currently operate would compel them to apply for enrollment at one of Ontario's 24 Colleges?

In February 2024, the Federal government put a cap on the number of international students, significantly reducing the percentage enrolled in Ontario. After many years of decline, the challenge to grow domestic enrollments has now become even more urgent. Without domestic student growth, the sustainability of some programs and some Public Colleges could be jeopardized.

### **3.3 Key Domestic Enrollment Facts**

#### Direct Student Enrollment Trends (High School Graduates)

- Data provided by OCAS for the 20-year period 2003-2023 shows that the two-year 18/19 age cohort in Ontario grew +12% from 342,000 to 389,000. The potential pool of direct students who apply after high school graduation to any post-secondary institution increased by 47,000 (+13%)
- Modest growth is reported over the same period when enrollment to Universities and Public Colleges are combined (134,500 to 141,000). However, when expressed as a percentage of all 18/19's, total enrollment in Public Colleges and Universities declined from 39.3% (2004) to 34.6% (2023).
- OCAS data for the same period shows enrollment in Ontario's Public Colleges declined by 13,000 direct students ages 18/19 (61,500 to 48,500) while Universities increased enrollments by almost +20,000 from 73,000 to 92,300.
- The data shows that in addition to fewer 18/19 year olds enrolling directly in Public Colleges from High School over the past 20 years, Public Colleges have lost 10.5 share points to Universities amongst this group; that is roughly equal to the increase in students attending University (20,000) combined with the decline reported in Public College enrollment (10,000).
- While data for For-Profit Colleges does not readily exist, it is assumed that this post-secondary education option is growing in popularity amongst domestic direct students as For-Profit Colleges promise potential students a faster track to job employment than is available for similar programs offered by Public Colleges. This hypothesis needs to be tested.

#### Potential Impact of Influencers on Direct Enrollment

- While research is not available to assess the role that Influencers may have in affecting the post-secondary choices of High School students, Colleges Ontario and participants in the audit were split on their impact. Without research, many question if influencers should be the primary target of marketing campaigns aimed at High School students.
- Those who influence High School students may include some or all of the following Consumer or Potential Consumer groups:
  - Parents/Guardians including new Canadian parents who many say have a known preference for University over College.
  - High School Teachers and Guidance counsellors.

- Employers who both,
  - Directly support Public Colleges in the delivery of applied/co-op programming, and
  - Those who hire students post-High School and may provide on-the-job training and/or certification instead of requiring a diploma/degree.

#### Public College Incompletes (Do not graduate)

- OCAS data shows that upwards of 35% of students who enroll in Public College leave before they graduate with their diploma or degree. Some data for 'Incompletes' has recently become available through OCAS student surveys, but the absolute size of this group warrants additional investigation and analysis, as do the reasons underlying this persistent trend.

#### Non-Direct Student Enrollment Trends (Do not pursue Post-Secondary Education after High School)

- Non-directs are defined as those who did not attend a post-secondary education institute of any kind following graduation from High School. OCAS data shows that non-directs account for about 80,000 applicants per term or roughly two-thirds of all applicants. This makes them a larger source of volume than direct students who apply after graduating from High School (approx. 60,000 direct applicants per term)
- Like direct enrollment, non-direct enrollment at Public Colleges is also in decline. As measured by OCAS, non-direct applicants have declined approximately 15% between 2016 and 2022.
- Non-direct students are a potentially large source of new students given the Ontario 20-29 age group alone accounts for about 2.3 million people.
- When non-direct Public College applicants ages 20-29 are expressed as a percentage of all Ontarians 20-29 the participation rate is however very low at approximately 3.5%
- There is evidence to suggest that within the non-direct segment, applications from older/mature students\_26+ are on the rise, however, this group is small accounting for less than 15% of all non-direct applicants.

## **PART 4 – RESEARCH OVERVIEW & REQUIREMENTS**

### **4.1 Overview**

To provide Colleges Ontario with the depth and breadth of understanding that it will need to develop strategic plans, the following represents an initial outline of the process and approach that Colleges Ontario envisages for this initiative. Once the Proponent has been selected, Colleges Ontario would fully engage its research partner in all aspects of the initiative to ensure the research design for Phase One is fulsome and is based on sound practices.

### **4.2 Budget**

Colleges Ontario is committed to undertake a research process that addresses its specific needs for information and data in full recognizing the scope of work outlined herein is substantial.

While Colleges Ontario will not request Proponents who choose to make an RFP submission to provide a budget estimate for the work outlined in Phase One, it reserves the right to request candidates who are selected for stage two of the RFP to respond to specific questions that relate to budget as costs will be one of the criteria used to compare short-listed Proponents.

Following selection, the Proponent will provide a detailed budget for the final Phase One research design that encompasses all necessary expenses, including but not limited to personnel salaries, equipment, travel, and overhead costs. The budget will also clearly articulate the allocation of funds across the various elements of the project, ensuring a transparent and efficient use of resources. Additionally, we expect a justification for each budget line item, demonstrating how the proposed costs directly contribute to the achievement of the project's objectives. The selected Proponent will be encouraged to leverage their expertise and innovative approaches to optimize the budget for maximum value without compromising the quality and scope of the research.

### **4.3 Phased Approach**

To optimize the learning and insights from this consumer research, a phased approach is being considered:

#### **In Scope for Phase One**

- Deepen understanding of who goes to Colleges, to University and who does not.
- Identify insights that will lead to strategy and innovation.
- Examine consumer and general perceptions of the brand, value proposition, and differentiators of Public College.
- Provide early actionable insights for members to use in marketing where possible as early as Fall/Winter 2024
- Identify insights that will lead to strategy and innovation.

- Determine if perceptions need to be altered and/or enhanced.
- Determine what other changes/innovations may be required.
- Prioritize which Consumer and Potential Consumer group will yield the most new students.

#### Out of Scope – Future Considerations for Phase Two

- Test hypotheses underlying Consumer insights identified in Phase One.
- Assess how Colleges can motivate high potential Consumer prospect groups to change their past perceptions/behaviours and apply to Public Colleges through OCAS.
- Optimize Colleges most compelling value proposition to high potential Consumer prospect groups.

#### 4.4 Research Objectives

For each of the Consumer and Potential Consumer groups listed below (See Sampling Criteria 4.5), the objectives of the research are:

- Establish a baseline of current levels of Brand awareness, attitudes, perceptions and interest in Ontario Public Colleges and Universities and For-Profit College systems and each of the 24 members of Colleges Ontario\*.
- Determine the key factors that are influencing current awareness, attitudes, perceptions, and interest in Ontario Public Colleges.
- Identify the unique benefits (values/strengths) that Public Colleges offer vs. those offered by Universities and For-Profit Colleges.
- Determine which of these Public College benefits generates greatest interest from each Consumer or Potential Consumer group.
- Rank in relative terms (highest to lowest) the potential that each of the Consumer and Potential Consumer groups could offer Ontario Public Colleges - if targeted to attract potential new students.
- Identify any weaknesses/shortfalls within the current Public College offering/system that may need to be addressed for future success.

**Note: \* Colleges Ontario will need to understand the feasibility of measuring awareness, attitudes, perceptions, and interest of individual college members within each of their Trading Areas.**

#### 4.5 Sampling Criteria

The following are the Consumer and Potential Consumer groups that are initially being considered for inclusion in the Phase One research initiative. Colleges Ontario would expect that the selected Proponent will recommend the sampling criteria for the final research design.

## Direct Consumer and Potential Consumer Groups

- **Direct** students 18/19 who upon graduation from High school selected University over Public College.
- **Direct** students ages 18/19 who upon graduation from High School selected For-Profit College over Public College.
- **Direct\*** students ages 18/19 who selected Public College. This group could serve as a 'control' for comparative purposes and used to identify values and strengths that could serve as leverageable assets to compel more direct applicants.
- **Parent/Guardians Influencers** Parents/Guardians whose beliefs/perceptions/opinions could affect the decisions made by their Grade 11/12 High School children. (Note: Parent sample should give consideration to new Canadians given their perceived bias toward University).
- **Teacher/Guidance Counsellor Influencers** whose beliefs/perceptions/opinions could affect decisions made by their Grade 11/12 High School students.
- **Incompletes\*** Public College students who directly enroll after Grade 12 but leave without completing their field of study.

**\*Note - Potentially can be sourced from OCAS database.**

## Non-Direct Consumer and Potential Consumer Groups

- **Non-direct Young Adults** 19-24 who chose not to pursue higher education of any kind after Grade 12 and have been working or not working for 1-5 years.
- **Non-direct Mature Adults** non-directs (25+) who have been working 5+ years and may consider College/University as 'last option' if they feel they've reached a dead-end with their career/employment. This group should be split into two sub-samples; 25 – 30 and 31 – 40 years of age.
- **Influencers\*** Business leaders who may a) co-operate directly with Public Colleges in the delivery of applied programs to prepare students for employment in specific fields and b) Employers who hire non-directs (and directs) and, in some cases, provide on-the-job training and/or certification instead of requiring a diploma/degree.
- **Current Public College Students\*\*** This group would serve as a 'control' for comparative purposes and used to identify values and strengths that could serve as leverageable assets to compel more non-direct applicants.
- **Incompletes\*** Public College students who enroll after taking at least one year away from post-secondary education but leave without completing their field of study.

**\*Note - Potentially can be sourced from Colleges Ontario**

**\*\*Note - Potentially can be sourced from OCAS database.**

#### 4.6 Sample Sizes

Quantitative samples of each Consumer and Potential Consumer group are required in Phase One to ensure the validity and reliability of the data. Samples will be sourced by the selected Proponent or from the OCAS database and/or from Colleges Ontario. Colleges Ontario expects that the selected Proponent would recommend actual sample sizes for each group based on its expertise and costing\*.

**\*Note - Once the Proponent has been selected Colleges Ontario will need to determine the feasibility of providing all or some of the data that is collected for each of the Trading Areas of its 24 member colleges.**

#### 4.7 Sample Composition

Each of the Consumer and Potential Consumer groups included in the research will be representative of the demography of each group in terms of gender, age, ethnicity, language and importantly, regionality.

#### 4.8 Custom Questionnaires

Colleges Ontario fully expects there will be common elements to the questionnaires used to gather the data to meet the objectives of the research that allow for comparative analysis. Given the diversity of the make-up of each Consumer and Potential Consumer group, the selected Proponent will need to prepare custom questions for each sample as well. While Colleges Ontario would look to the selected Proponent for its expertise in this area, some initial areas of interest to College Ontario for exploration include:

- Price-value perceptions of Public College vs. University vs Private College.
- GEN Z student unique needs/wants/desires and how they may be different from other generations.
- Post-secondary education vs. work trade-offs.
- Traditional full-time class setting vs. part-time/virtual learning.
- Value of diploma/degree vs. online badging vs. on-the-job training provided by employer.
- Awareness and perceptions of current College sector naming protocols including College and Polytechnic.
- Understanding of the advantages of applied learning vs. theoretical learning.
- International student perceptions.
- Other TBD.

#### 4.9 Phase One Initial High-Level Timeline

Colleges Ontario is planning on presenting the consumer insights drawn from Phase One research to its members this year. Below is an initial timeline that guides the process. Once selected the Proponent will be requested to provide detailed timelines for all deliverables.

- |   |                       |
|---|-----------------------|
| ○ RFP process                                       | April/May             |
| ○ Select Proponent                                  | May/June              |
| ○ Finalize Proponent research design/costs/contract | June                  |
| ○ Phase One research in-field                       | July/August/September |
| ○ Key Findings/Implications presentations           | September/October     |
| ○ Phase One Recommendations/Next Steps              | October/November      |

## **PART 5 – REPORTING**

### **5.1 Main Relationship**

The principals of HALO will oversee the relationship with the selected Proponent on behalf of Colleges Ontario reporting directly to the CEO of Colleges Ontario. From time-to-time the CEO of Colleges Ontario, or their designate, may attend meetings.

### **5.2 Other Parties**

HALO will be supported by an internal steering committee that is made up of senior Heads of Marketing from individual Colleges who have purposely been selected by Colleges Ontario to represent all 24 Colleges. From time-to-time, HALO may request the selected Proponent to meet with the steering committee directly. As well, the selected Proponent will be expected to present research findings and implications to several internal groups including Colleges Ontario executive team and its Government Relations agency, College Presidents, College Heads of Marketing.

## **PART 6 – PROPOSAL REQUIREMENTS & GUIDELINES**

### **6.1 Mandatory Requirements - Proponent Information**

A one-page summary sheet containing the following information is required:

- i) Provide name, title and contact details of the person who is primarily responsible for the Proposal.
- ii) Provide Proponent's registered legal business name and any other name under which it operates, and the full address and telephone number.
- iii) Provide the type of business structure of the Proponent, such as an individual, sole proprietorship, corporation, partnership, joint venture, incorporated consortium, or other legally recognized entity.
- iv) Provide names and full details of any other parties whose services the Proponent intends to subcontract or use in connection with management of deliverables.
- v) Provide a statement confirming whether the Proponent is associated with another individual, sole proprietorship, corporation, partnership, joint venture, entity, or consortium that has as its business the provision of deliverables similar to those described in this RFP.
- vi) To significantly reduce reliability on email as a common modality of document delivery and collaboration, outline how the proponent will address and handle document delivery, document review and collaboration, and secure storage.

### **6.2 Other Requirements - Proponent Capabilities and Relevant Experience**

- i) List any post-secondary education sector experience your firm has that is relevant to the proposed deliverables for Phase One.
- ii) Provide the names, roles, and relevant experience of the person(s) who will manage implementation of the proposed deliverables day to day. Append bios of person(s) who will manage the work.
- iii) Include a maximum of two (2) case studies that are relevant to the proposed Deliverables for Phase One. Case studies should be no longer than two pages each and should include - Objectives/Research Design/Application of Results i.e., how the research findings were utilized/applied in terms of marketing, advocacy, public affairs etc.
- iv) Proponents should include on a separate page(s) demonstrated expertise and experience in the following:
  - Data collection assuming sampling criteria outlined in Part 4.5.
  - Data analysis.
  - Proprietary analytical techniques judged relevant for this research project.
  - Strategic planning.
- v) Proponents should include a complete outline of their French language capabilities.

### 6.3 Specific Questions

- i) List any current work that is underway in the post secondary education sector.
- ii) Provide your perspective of the scope of work outlined in Part 4 - Research Overview and Requirements. Feel free to comment on any aspects of the scope of work that your firm may have specific knowledge of, Also, feel free to comment on the soundness of the research design and any considerations that are worthy of attention.
- iii) Describe how your firm would source respondents for each of the samples identified in Part 4.5 excluding for the time being those samples that OCAS may be able to source from its database.
- iv) Based on past experience and/or knowledge are there Consumer and Potential Consumer groups (i.e. samples) that could be included in Phase One? If so which one(s) and why?
- v) Realistically which quantitative samples can be cost-effectively sourced for each of the individual 24-member Colleges Trading Areas and which samples would either be regional in scope or province-wide?
- vi) Provide your thoughts as to the reasons why Public Colleges have experienced a decline in domestic student enrollment and market share?
- vii) What makes your firm uniquely qualified to work on Phase One of the project with Colleges Ontario?
- viii) Based on what you know as of now, what subsequent research might you propose that Colleges Ontario consider in order to leverage the insights from Phase One?

### 6.4 Schedule of Fees

The Proponent must provide a detailed schedule of hourly fee rates for all the individuals and the roles/positions that each person assigned to this engagement. If the names of any individual cannot be provided at this time, provide a statement of hourly costs by position. Taxes must be itemized separately. All costs must be in Canadian dollars.

**Note: The Proponent shall not use funds for any HST costs for which it has or will receive a rebate, tax credit, input tax credit or refund.**

### 6.5 Additional Cost Considerations

Colleges Ontario understands that it is very difficult for Proponents at this stage to provide an estimate of costs (fees and hard costs) and/or an itemized break-out of costs for each of the deliverables. For the purposes of this RFP submission, outline from a cost perspective any of the advantages that Colleges Ontario could expect if your firm is selected for the deliverables outlined in Phase One.

## **6.6 References**

Proponents are required to provide two references from organizations for which the Proponent has successfully provided similar services in the past three-years. The name and telephone number of a contact person for each reference and a brief outline of the nature of the services provided must also be included. Colleges Ontario, in its sole discretion, may check the Proponent's references to confirm the Proponent's experience and/or ability to provide the Deliverables required and described in its proposal.

## **6.7 Conflict of Interest**

The Proponent must make a full and complete disclosure of any existing business or other relationships that would give rise to a Conflict of Interest in the performance of the work as described in its RFP. The Proponent, by submitting the proposal, confirms that, to its best knowledge and belief, no actual or potential Conflict of Interest exists with respect to the submission of the proposal or its work performance, except if/as disclosed. Where Colleges Ontario discovers a Proponent's failure to disclose all actual or potential Conflicts of Interest, Colleges Ontario may disqualify the Proponent or terminate immediately any contract awarded to that proponent. If, at the sole and absolute discretion of Colleges Ontario, the Proponent is found to be in a Conflict of Interest, Colleges Ontario may disqualify the proposal submitted by the Proponent.

## **6.8 Right to Rescind**

Colleges Ontario has the right to rescind any Contract awarded to a Proponent in the event that Colleges Ontario, in its sole discretion, determines that the Proponent made a misrepresentation or submitted any inaccurate or incomplete information.

## **PART 7 - EVALUATION OF PROPOSALS**

Colleges Ontario will evaluate the overall quality of the proposals with attention to the following:

### **7.1 Experience and Qualifications**

- i) Experience planning, implementing & managing similar types of projects.
- ii) Post-secondary education qualifications & experience of individual team members.
- iii) Knowledge and experience in authoring research studies of similar scope and complexity.
- iv) Relevance and Proponents role in case studies provided.

### **7.2 Demonstrated Understanding of Project and Deliverables.**

- i) Responses to specific questions as per Section 6.3
- ii) Inclusion of value-added elements

### **7.3 Potential of Cost Efficiencies**

- i) Competitive fee schedule as per section 6.4
- ii) Inclusion of potential cost-saving measures as per section 6.5

**Note: Mandatory Requirements must be met before a proposal is evaluated. If, in the opinion of Colleges Ontario, a Proposal does not meet the Mandatory Requirements, it will be disqualified.**

## PART 8 – TERMS AND CONDITIONS OF THE RFP PROCESS

### 8.1 RFP Timetable

The following is the target schedule for this RFP:

|   |                          |
|---|--------------------------|
| Issue Date of RFP                               | April 15th, 2024         |
| Proponent's Deadline for Questions              | April 24th, 2024, at 5pm |
| Pre-Submission Information Session              | April 29th, 2024, TBD    |
| Proposal Submission Deadline                    | May 6, 2024, at Noon     |
| In-person meetings with short-listed Candidates | w/o May 20th             |
| Announcement of Selected Proponent              | w/o May 27th             |

**Notes: Period for which proposals are irrevocable after Proposal Submission Deadline is 90 days. At any time prior to the Proposal Submission Deadline, the RFP timetable is tentative only.**

### 8.2. General Instructions and Information

- i. Any quantities or data provided in the RFP or in response to questions is an estimate for the purpose of indicating the general size of the work, and Colleges Ontario does not guarantee its accuracy.
- ii. It is the Proponent's responsibility to avail itself of all the necessary information to prepare a proposal in response to this RFP.
- iii. Proponents are responsible for bearing all costs incurred in the preparation and presentation of its proposal including costs incurred for interviews or demonstrations.
- iv. **Colleges Ontario must receive a Proponent's expression of interest to participate in this RFP and any questions concerning the RFP in writing or by e-mail to Amy Dickson (dickson@collegesontario.org) on or before April 24, 2024 by 5pm.** No communications concerning this RFP are to be directed to anyone other than the listed Contacts. Colleges Ontario is under no obligation to provide additional information but may do so at its sole discretion.
- v. It is the responsibility of the Proponent to seek clarification on any matter it considers to be unclear. A Zoom link will be issued to all Proponents who express interest in participating in the RFP before the pre-submission information session on **April 29, 2024 (time TBD)**. Colleges Ontario will not be responsible for any misunderstanding on the part of the Proponent concerning the RFP or its process.
- vi. If Colleges Ontario, for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated to all proponents by addendum circulated to each Proponent. Each addendum will form an integral part of this RFP. Proponents are responsible for obtaining all addendum issued by Colleges Ontario.

- vii. In the event that a Proponent chooses to cancel the receipt of addendum or amendments, its proposal may be rejected.
- viii. If any addendum is issued after the deadline, Colleges Ontario may at its discretion extend the Proposal Submission Deadline for a reasonable amount of time.

### 8.3 Instruction for Submission of Proposals

Proposals must be submitted by the following method:

- i) A Proponent must submit one (1) PDF file copy of its proposal and a fully completed Proposal Submission Form (Appendix A) marked as CONFIDENTIAL. The RFP title must be clearly marked on the first page of the submission and on the email subject line.
- ii) Submit proposals in PDF document format **via email** to [clairmont@collegesontario.org](mailto:clairmont@collegesontario.org) **by Monday May 6, 2024 at NOON [12PM]**
- iii) Proposals submitted in any other manner or after the Proposal Submission Deadline cannot be accepted.
- iv) At any time before the Proposal Submission Deadline, a Proponent may amend or withdraw a submitted proposal. Any amendment should clearly indicate what part of the proposal the amendment is intending to replace. Any amendment or notice of withdrawal must be submitted in the same manner as set out in the above submission procedures.
- v) Proposals shall remain irrevocable in the form submitted by the Proponent for a period of ninety (90) days running from the date of the Proposal Submission Deadline.
- vi) Colleges Ontario reserves the right to seek clarification and supplementary information relating to the clarification from proponents after the Proposal Submission Deadline. Colleges Ontario also reserves the right to interview any or all Proponents to obtain information about or clarification of their proposals. In the event that Colleges Ontario receives new information from the Proponent that results in earlier information being deemed to be inaccurate, incomplete, or misleading, Colleges Ontario reserves the right to revisit the Proponent's compliance with the Mandatory Requirements and/or adjust the evaluation of Rated Criteria.
- vii) All the provisions of this RFP are deemed to be accepted by each Proponent and incorporated into each Proponent's proposal.
- viii) Colleges Ontario will not consider any web site content or any other external documents as a part of a Proponent's proposal.
- ix) Except where expressly set out to the contrary in this RFP or in the Proponent's proposal, the proposal and any accompanying documentation submitted by a proponent shall become the property of Colleges Ontario and shall not be returned.

## 8.4 Selection of Proponent

Colleges Ontario anticipates that it will select a Proponent no later than **Friday May 31, 2024, by 5pm**. Notice of selection by Colleges Ontario to the selected Proponent will be in writing. The selected Proponent and Colleges Ontario will enter into a written agreement within fifteen (15) business days of notice of selection. This provision may be waived by Colleges Ontario at its sole discretion.

If Colleges Ontario and the selected Proponent fail to enter into an Agreement or satisfy any other applicable conditions within fifteen (15) days of notice of selection, Colleges Ontario may, in its sole and absolute discretion and without incurring any liability, rescind the selection of that Proponent and proceed with the selection of another Proponent.

Once the successful Proponent and Colleges Ontario enter into an Agreement, the other Proponents will be notified by Colleges Ontario of the outcome of the procurement process.

Proponents are advised that their proposals will, as necessary, be disclosed on a confidential basis, to Colleges Ontario's advisers retained for the purpose of evaluating or participating in the evaluation of this proposal.

Colleges Ontario reserves the right to:

- a) Make public the names of any or all Proponents.
- b) Request clarification or the submission of supplemental information in relation to the clarification request from any Proponent and incorporate a Proponent's response to that request into the Proponent's proposal.
- c) Adjust or reject a Proponent's proposal on the basis of:
  - i) a financial analysis determining the actual cost of the proposal when considering factors including quality, service, and price;
  - ii) information provided by references;
  - iii) the information provided by a Proponent resulting from Colleges Ontario exercising its clarification rights under this RFP process; or
  - iv) other relevant information that arises during this RFP process;
- d) Waive formalities and accept proposals which substantially comply with the requirements of this RFP.

- e) Verify with any proponent or with a third party any information set out in a proposal.
- f) Disqualify any Proponent whose proposal contains misrepresentations or any other inaccurate or misleading information.
- g) Disqualify any Proponent or the proposal of any Proponent who has engaged in conduct prohibited by this RFP.
- h) Make changes, including substantial changes, to this RFP provided that those changes are issued by way of addendum in the manner set out in this RFP.
- i) Select any Proponent other than the Proponent whose proposal reflects the lowest cost to Colleges Ontario or the highest overall score.
- j) Cancel this RFP process at any stage.
- k) Cancel this RFP process at any stage and issue a new RFP for the same or similar deliverables.
- l) Accept any proposal in whole or in part.
- m) Discuss with any Proponent different or additional terms to those contemplated in this RFP or in any Proponent's proposal.
- n) If a single proposal is received, reject the proposal of the sole Proponent, and cancel this RFP process or enter into direct negotiations with the sole Proponent.
- o) Reject any or all proposals in its absolute discretion.

These reserved rights are in addition to any other express rights or any other rights which may be implied in the circumstances and Colleges Ontario shall not be liable for any expenses, costs, losses or any direct or indirect damages incurred or suffered by any Proponent or any third party resulting from Colleges Ontario exercising any of its express or implied rights under this RFP. By submitting this proposal, the respondent consents to collection of the information as contemplated under this RFP for the uses contemplated under this RFP.

**APPENDIX A – PROPOSAL SUBMISSION FORM**

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Proponent’s Full Business Name and Address:

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Proponent’s E-mail and phone number:

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Contact name, email, and phone number of person primarily responsible for the Proposal:

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**Declaration of Proponent:**

By submitting the proposal, I/we agree and consent to the terms, conditions, and provisions of the RFP.

I/We have included references as required by Colleges Ontario and consent to Colleges Ontario performing checks with those references and with any other relevant references.

I/We understand that my/our submitted proposal is based upon the acceptance of the proposal, in whole or in part, within 90 days of the Proposal Submission Deadline and is irrevocable during that period.

**Conflict of Interest**

I/ We hereby confirm that there is not, nor was there ever, any actual or potential Conflict of Interest relating to the preparation of my/our submission, nor do I/we foresee any actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP.

[or if applicable, strike out the above and include the following:]

The following is a list of actual or potential Conflicts of Interest relating to the preparation of our submission or the performance of the contractual obligations contemplated in the RFP:

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In submitting the proposal, I/we have no knowledge of or ability to avail ourselves of confidential information (other than confidential information that may have been disclosed by Colleges Ontario to the proponents in the normal course of the RFP) which is relevant to the contemplated contract, its pricing, or the RFP evaluation process.

**Disclosure of Information to Evaluation Team**

I/We hereby consent to the disclosure, on a confidential basis, of this proposal by Colleges Ontario to the project evaluation team for the purpose of evaluating or participating in the evaluation of this proposal.

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Signature of Proponent representative:

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Name and Title:

I have authority to bind the proponent.

Dated at                    this                    day of                    , 2024