Request for Proposal

For the Extracurricular Programming and Appointment Booking Management System at the Center for International Students

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INTENT TO BID FORM

RFP Number: 000234WWSC889

Due February 14th, 2020

Upon reviewing the RFP, we: Plan_____Do not Plan_____ to submit a proposal.

1. Bidder_____

2. Name of Contact_____

   Mailing Address_____

   _____

   _____

   _____

3. Phone Number_____

4. Email Address_____

5. Title_____

Signature of Contact_____

Date_____

1. Description of the Organization

The post-secondary education sector is booming in North America as more and more parents not only see the benefit of sending their children abroad but now are able to afford to. This is big news for Post-secondary institutions like the Scarborough College whose revenue from domestic students are being affected by government-induced budget cuts. In order to retain and invite more international students, universities must work hard to provide the support that these students need. University is difficult to navigate through for native speakers; it can be even harder for students whose first language is not English. This is where places like the Center for international students at Scarborough College play a big role.

The Center for International Students (CIS) at the Scarborough College is an office under the Department of Student Affairs that offers programs and services for international students and internationally minded local students. The CIS supports close to 3500 international students who make up 20% of the college's total student body. Services offered by the CIS include assistance with study permit applications, return visas, post-graduation work permits, health insurance claims, information on exchange programs, and transition advising (See Figure 1).

The center as a whole is expanding every year to keep up with the ever-growing number of international students being admitted. Last year an additional immigration advisor was hired to add to the existing team of three advisors along with 4 additional Work-Study student staff to help manage the influx of immigration related appointments and transition related events. The staff are very passionate in helping to provide students with a positive extracurricular experience and are very skilled in recognizing students' needs. They work tirelessly in planning workshops and events that can cater to those needs. However, passion and dedication can only take an organization so far; a strong information management system is needed to run services quickly and efficiently so as to satisfy as many clients as possible. International students are paying close to three times the tuition as domestic students and staff members strongly feel that the services for these students should be reflective of their investment.
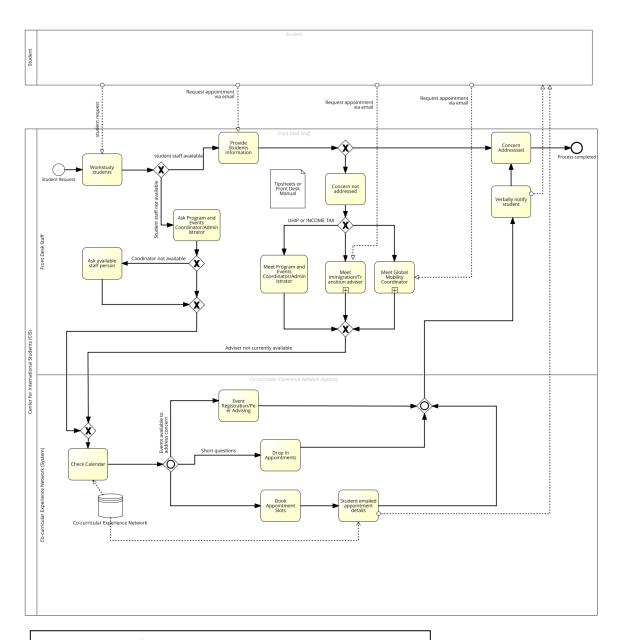
Figure 1: Center for International Students Business Process

2. Problem Statement

The Scarborough College's centralized extracurricular management platform, Co-curricular experience Network (CEN) will be the focus of this request for proposal. As a centralized system, it is used by all departments within the Scarborough College appointment booking and event registration management. The Center for International Student books approximately 3000 appointments and hosts 250 events in a single academic year (8 months). Appointments are booked when students come to the front desk with questions that cannot be answered by front desk staff. Questions on health insurance claims or study permit expiry are immediately booked with the first available advisor. Appointments can also be booked by advisors themselves when the advisors plan their monthly check in with students or when students email them with specific questions. Once date, time and appointment type are confirmed, students are sent a confirmation email via their official college webmail. A reminder email is also sent to them 24 hours before the time of the appointment.

Some questions students have can be answered by the front desk work-study students. However, some answers require more detailed explanations, and this is where the work-study staff often suggest that students sign up for specific workshops or events that will address the issue at hand. Work-study staff do not have the authority to sign students up for events, so it is left at the discretion of the student of whether they sign up for the recommended event or not. Like the appointments, if students sign up for the events and workshops, they receive a confirmation email and a reminder email, closer to the day of the event, confirming the date, time and location of the event.

While the number of appointments booked and events planned are impressive, the attendance rate of the appointments and the events are low and this is what motivated the analysis and evaluation of CEN. Students know about the center and its services (which is clear from the number of appointments booked) but why the turnout rate was low was a mystery. A systems evaluation was done on CEN which revealed a large time gap between the time a student booked an appointment or registered for the event to the time when the event or appointment actually took place. Between 2015 and 2017, the number of international students admitted to Scarborough college went up by 20%; that is 200 new students every year. The evaluation showed a slow decrease in the appointment and event turnout since 2015 which has been linked to pre-booking appointments 2-3 months in advance due to the increased demand for the advisors and their services. The confirmation and reminder emails were sent to the student's official college email which many of them never checked. Students not only miss their appointments, but they also fill up space that other students can't use. The event turnouts were low because many students couldn't find the event the work-study student was referring to or did not know how to navigate through CEN to find events specifically from the CIS.

Event and appointment attendance are key performance indicators at the CIS; funding for programs and services is heavily dependent on this factor. As post-secondary institutions face budget cuts, it will be more difficult to justify the CIS's budget if the attendance numbers do not look positive.

There are no paper-based elements to this system. The CEN portal is accessible on all web-browsers and only requires a working computer, a WIFI connection and the proper log in credentials.

The systems evaluation has highlighted the need for an add on platform specifically for the Center to optimize the services being offered. As CEN is used by different departments within Scarborough college, making changes to directly to the platform would affect the operations of other departments. After consulting students who use the services, staff members who provide such services and the IT personnel who maintain CEN, a conclusion has been reached to integrate an additional system that will be specific to the Center for international students.

3. Description of the Proposed System

The proposed system is an integration of two items, a software or platform for the CIS staff and an application programming interface (API) which communicates with the cloud servers of CEN and the academic records system to not only use the features already available on both platforms but also to retrieve information that may help track down students who are struggling to transition.

The software portion of the proposed system will only be used by CIS staff. It will include features to book appointments, post event registration information and sign students up for events. It will also link with the academic records system to flag students who are struggling academically so authorized advisors can check in on them as soon as possible. The advisors themselves won't have access to student grades but using logic that will be built into the software and the information from the academic records system, the proposed software will make it known to the advisors which students appear to be struggling. Front desk staff would be able to write individualized messages in the appointment confirmation emails highlighting special documents or tasks students need to bring in or complete before the appointment.

With students' consent, front desk staff will also have the option of signing students up for events that may be beneficial for them. Students will also have the option of signing up for mobile alerts and reminders along-side the current email reminders and those alerts will contain a link to cancel an event or an appointment if the student cannot make it. This text alert and cancellation through text will be an added feature of the software. The software will use CEN and Academic Records cloud servers to store and retrieve information and an API will be required to allow for unfettered communication and access between the new software and the two mainframes of CEN and Academic Records System. Unlike CEN which can run on all browsers and on all personal computers, the proposed software should only be accessible from within specific computers at the center for international students.

The software and API should be custom built as the information that will be handled by the software is very sensitive. Another reason for this is that CEN was designed by Corbis Communication and although our agreement with Corbis allows us to make modifications to the platform as we see fit, one of our limitations is that any modification must be custom built as Corbis will not share their the logic and code behind their platforms with any off- the-shelf products. As such, vendors will have to design their own unique interfaces for this project.

At the end, integration of the new software and the API should make it easier for staff members to individualize confirmation and reminder emails and have students receive text alerts on phones. The system is expected to be fully functional by **September 15th, 2020.**

4. System Stakeholders

Within the context of the center for international students, there are 2 major direct users, which include the full-time and work-study staff and the students who use the services. The work-study staff play a key role in delivering services to students. Advisors rely on CEN for their daily consultation and workshop schedules. The work-study student staff use CEN to help book appointments and consultations so the advisors can deliver the services. The work-study staff also help to facilitate many of the workshops and workshop attendance is dependent on how many students sign up for it. Students' roles as system stakeholder is obvious in that they receive the services because CEN is there to facilitate the timings and schedules of events.

The major non-user in this case would be the Manager of the CIS whose job it is to keep track of the key performance indicator of student attendance to events as the funding of the department relies heavily on this number. The funding committee requires that total attendance of events account for at least 30% of the number international students attending the college. Although this number is being met, it doesn't justify the need for more funding that is required to hire more work-study students and advisors to handle the growing body of international students. The actual numbers are not reflecting the current service demands.

5. Tender Process

The release date of this RFP is the **14th of December 2019** and the deadline for submissions is **14th of April 2020**. Please submit the Intent to Bid form by the **14th of February 2020**.

Vendors are permitted to submit questions on this Request for Proposal. Please legibly hand-write your questions deliver them by 9:00:00pm January 14th, 2020 in a sealed envelope to:

Anushay Chopra
Manager, Center for International Experience
Kirkland Hall, 2nd floor, Room 200
Scarborough College
1150 Ellesmere Rd
Scarborough, Ontario
M5S 3S6

Please note that a **pre-postage paid envelope that is already addressed to the vendor** must be included with questions in order for responses to be sent. Respondents can expect a response by **February 1st, 2020.**

Respondents must submit the Intent to bid Form found in this document to

Michael Jero
Senior Systems Analyst
Kirkland Hall, 7th floor, Room 722
Scarborough College
1150 Ellesmere Rd
Scarborough, Ontario
M5S 3S6

Forms received after 4:00:00pm eastern time on February 14th, 2020 **will not be accepted.**

The final proposal must be sent to

Anushay Chopra
Manager, Center for International Experience
Kirkland Hall, 2nd floor, Room 200
Scarborough College
1150 Ellesmere Rd
Scarborough, Ontario
M5S 3S6

Submissions received after 4:00:00pm eastern time on April 14th, 2020 **will not be accepted.**

Please submit an excel spreadsheet for the annual costs of the above-mentioned items within the proposal but in a section titled: Pricing for Service. Ensure that the cost breakdown is as detailed as possible with costs for hardware and professional services shown separately.

The following criteria will be used to evaluate the proposals:

Evaluation Criteria	Weighting	Points
Mandatory Requirements **-**integrate with CEN and Academic records system	35%	40
-user functionality	15%	
Technical Requirements -only accessible from CIS computers	15%	30
-accessible on all operating systems and web-browsers	5%	
	10%	

		15
-ability to incorporate verification and validation rules		
Implementation -Planning and organization -Ability to meet deadlines -Support for installation and set up **-**overall system design	2.5 5 5 2.5	15
Financial Evaluation	5%	5
References -Vendor References	5%	5
Total		100 points
Previous Experience (Bonus)	5%	5

We are looking for innovative solutions to our dilemma and so respondents with less than a few years of experience are still encouraged submit proposals

The evaluation team will consist of the manager for the center for international students, three full-time advisors (two immigration and transition advisors and one global education advisor), three work-study students two IT personnel from Scarborough College

Each shortlisted candidate is expected to deliver a presentation and undergo an interview process.

The respondents will be expected to deliver a 7-minute presentation of their ideas, which will be attended by the entire evaluation team.

Respondents then will undergo a 15-minute interview which will be conducted by a panel consisting of the manager, the IT personnel and the three advisors. Questions posed at the time will be on the content of the presentation as well as specific system requirements.

6. Functional Requirements

1. System Architecture (Critical)

- Provide a platform or software which can sync with existing platforms and software through a specially designed API
- Use student number and birthdate as private key access student record
- Control content access of different user groups to maintain privacy (work-study students and full-time staff both use the same software, but work-study students will not have access to student grades

2. User Alerts (critical)

- provide students SMS alerts for confirmed appointments as well as appointment reminders
- -enable alert to contain cancellation or rescheduling webpage link

3. Individualized Appointment Booking (critical)

Connects with CEN to

- Include specialized textbox for appointment booking page to allow for any additional comments or notes.
- Allows event registration on behalf of consent giving students

4. Vulnerability Flag:

- connects with Academic Record server to flag students currently not in 'good standing' or students whose grades have been dropping

7. Non-functional Requirements

(a) Look and Feel (Important)

- Provide a system that mirrors CEN and its functionalities

(b) Reliability/Availability (Important)

- Provide a system that is up and running 24/7
- allow students to cancel or change appointments 48 hours before the actual appointment

(c) Capacity/Scalability (Important)

- allow multiple users to book appointments and access the calendar at once

(d) Interoperability (Critical)

- must be able to sync with CEN and Academic Records cloud servers to retrieve and input information
- what other existing systems does this new system need to connect with? Is an open-source solution required or desirable?

(e) Accessibility (Nice to Have)

- Large fonts for visually impaired fonts
- What needs are there for accommodating users with disabilities?

(f) Security/Privacy (Critical)

- Restrict access based on user group
- Software use only accessible on specified computers

- Successful login onto CEN required for access to new software or platform

(g) Audit (Nice to Have)

- Maintain logs for all users and what was accessed

(h) Technical Support (Important)

- Provide technical support for the first four months and keep open communication with Scarborough college IT personnel
- Provide detailed error messages
- Provide troubleshooting procedures

(i) Documentation (Important)

- Requirements Documentation: provide users with information on software's lifespan and complexities.
- Technical Documentation: provide information on how to change existing software to accommodate more users or more features
- End User Documentation: provide information to users on how to access different features

(j) Installation Process (Important)

- Installation will be managed by IT team at Scarborough College. Installation must occur between May and August.

(k) Training Provision (Important)

- Provide one-time in-house training to staff after installation
- Provide training videos for staff to refer to and for future staff members to use

8. Questions for the Vendor

Interested respondents should provide two references for the evaluation team to contact. Please include the following pieces of information for each reference

- Name
- Phone number
- Email address
- Name of organization
- Number of years worked
- Title
- Times available for contact
- Resume

Interested respondents are asked to provide answers to the following questions:

- What can you provide us with that no one else can, i.e what is your competitive advantage?

- What is the size of your company?
- Names and durations of previous projects?
- What is the longest time a company has used your product for?
- Future of your company?
- Hours of operation?

9. Appendices for "Internal Use Only"

(a) Appendix 1: candidate vendor list

A google search using the words "appointment booking system user alerts" resulted in many commercial off the shelf software names. Majority of the vendors found via this google search design software for the Medical Field.

The system currently in place at the CIS only requires additional features to be added which is why custom-made software is being requested. however, the following three Vendors sell products that sound similar to what the CIS is attempting to achieve:

- Reminder Services Inc: Their product Reminder Call allows for reminder texts and calls to be send just from data stored in a spreadsheet. This is advertised as a add-on feature to other appointment software.
- Wellness Living Systems: Their product Wellness Living is advertised as a all-in-one solution and has a desktop and mobile scheduler for both clients and staff to interact with
- 10to8 Inc: Their product 10to8 is advertised as a all-in-one appointment reminder and scheduling software trusted by 50,000 business worldwide. They have SMS and email reminders and let clients book appointments 24/7.

(b) Appendix 2: recommendation (and reasoning) as to whether to include a budget for this project in the RFP

It is good to include the budget in your RFP so the vendors know the numbers they have to work around. You can put the price as a criterion in your evaluation so that vendors are aware that if they ask for a price that is too high, they risk losing points on the overall evaluation of their proposal. They know a few points can be the difference between a win and a loss so applying a strategy like this can lead to a win-win situation for the vendor and the buyer. The annual allocated funds for the CIS is around $500,000 including the employee salaries. An additional $100,000 dollars was granted this year for the implementation of this project. If vendors offer a price around the $100,000 dollar margin, then we either save a little or spend exactly what we set aside. If the price is over 100,000 we need to find a way to cut costs from the operational budget which can include hiring less work-study students or hosting less events; both of which will negatively impact the student experience. It is better to include the price in this case and since we welcomed the proposals of less experienced vendors, there are more vendors who are likely to send in proposals which can result in a competitive pricing advantage for us.

(c) Appendix 3: a list of all sources you consulted

- Volere Requirements: functional and non-functional requirements
- CHEO request for proposal example: Intent to Bid form, RFP process, pricing summary
- Ijournal submission: UHN Request for Proposal by Shanthini Ratnakumarasuriyar: System stakeholders, tender process, Appendices