REQUEST FOR INFORMATION

The Council of Ontario Universities is seeking information on solutions for the development of a COU Data Hub.

ISSUE DATE: July 26, 2021
CLOSING DATE: October 8, 2021 at 5:00 PM (EDT)
TENDERING ORGANIZATION: COU Holding Association Inc.

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1. GENERAL OVERVIEW

What is an RFI?

An RFI is a formal, non-competition, request for general information from Vendors in a targeted industry. Typically, it is used to help an organization develop the scope of work requirements of a competitive bid, such as a Request for Proposal (RFP).

RFIs are non-binding and submission to one is not a requirement for submitting to an RFP. It does, however, give the Vendors an opportunity to showcase their wares or services and become part of the conversation through their submission. That conversation will help provide information for a potential subsequent RFP with a refined scope of work to better reflect the industry and help avoid any common scope pitfalls Vendors may have witnessed in the past.

1.1 Summary of Requirement

COU Holding Association Inc., on behalf of the Council of Ontario Universities (COU), is seeking information on the commercial off-the-shelf and/or custom solutions available to create a COU Data Hub. COU wishes to better understand:

- The Suppliers in the marketplace;
- The fit with COU’s existing infrastructure;
- General costing of the solution (both initial and ongoing); and
- Guidance on Product/Service considerations when drafting a Request for Proposal (“RFP”).

COU is looking to modernize its existing online data holdings, including:

- Common University Data Ontario (CUDO) (https://cudo.ouac.on.ca/); and

For many years, COU has used the CUDO platform to collect and organize sector-wide and institution-specific data both for public and sector consumption. CUDO offers key data, in a common format, about Ontario’s universities, including, but not limited to:

- Number of degrees awarded, student enrolment and entering averages – all by program;
- Number of students living on campus and activities offered;
- Student satisfaction;
- First-year tuition and ancillary fees by program;
- Number of teaching faculty;
• Undergraduate class size, by year level;
• Research awards granted; and
• Graduation rates and employment rates by program.

The Multi-Year Data includes tables such as:

• Applications and Applicants;
• Degrees Awarded;
• Enrolment;
• Faculty;
• Funding;
• Graduate Employment Outcomes; and
• Student Financial Assistance.

However, CUDO’s limited functionality no longer meets the needs of neither the public nor of COU and the sector, who rely heavily on data for advocacy, strategic planning, decision-making, and public relations. A COU Data Hub would serve the interests of the sector by acting as a centralized hub for data collection, visualization, and analysis. It would have tiered access, with the first tier offering public-facing data and the second tier offering data only accessible to specific users through a secure log-in.

The solution should provide functionality that both replaces and enhances existing CUDO capabilities, including, but not limited to:

• Data modelling;
• Database design;
• Data transfer (the ability for member institutions to easily upload their data);
• Automation;
• Authorization and access management;
• Analytics and visualization tools;
• Self-serve functionality (password resets, enrollment, administration, etc.);
and
• Logging, audit, and reporting.

In addition to the functionality involved, COU is also looking for implementation services to assist with the deployment of such a platform. COU recognizes this website will likely have to be developed incrementally, and is seeking advice on the best way to build a solid platform that can be adapted as we better understand users’ needs.
Background
The Council of Ontario Universities (COU) promotes universities' education, research, and their role in preparing both undergraduate and graduate students for success in life and careers. A membership organization consisting of Ontario’s 20 publicly assisted universities and one associate member, the Royal Military College of Canada, COU works with members to find consensus on a wide range of issues and advances them with government and other stakeholders. More information about COU is available on our website: www.cou.ca.

Information Sought
COU is inviting Proponents to share information that will inform the upcoming procurement process for developing a COU Data Hub to meet the following requirements:

- **Database development**: Model our data in a way that is accessible, clear, allows linking data, and has functionality for users at varying skill levels.

- **Data Catalogue**: Create an easy to use and understand catalogue listing data and meta data for use by member universities.

- **Platform integration**: The COU Data Hub should be able to function on our existing server.

- **Automation**: COU is seeking to automate and improve our data-sharing and uploading processes.

- **Flexibility to support three user types and their accounts**: Public, members (i.e., university staff), and administrators (i.e., COU staff).

- **Authentication**: Allowing multiple types of authentication methods, including user/password, identity federation, and multi-factor.
  - For COU member organizations, their login should be tied to other existing COU platforms such as the COU member portal.

- **Self-service**: Self-handling of various CUDO tasks, such as account and access requests and attestations, including initial account setup.

- **Modular**: Supporting extension with new data sources and requirements.

- **Resiliency**: Protecting itself from data quality, code, and configuration issues.
• **High availability**: Ensuring the system is fully redundant to reduce outage.

• **Audit and reports**: Ensuring compliance with existing laws and regulations, and flexibility to support emergent/future requirements with natively built-in features such as audits, access reviews/certifications, and reports.

• **Implementation services**: Professional services to work with the COU team and appropriate stakeholders to implement and deploy the solution.

• **Maintenance**: COU would like to explore the cost and resourcing required for both in-house maintenance and third-party platform management.

• **Accessibility**: The platform must meet WCAG 2.0 Level AA standards for accessibility, follow best practices and adhere to any relevant provincial or federal laws or regulations related to accessibility.

• **Optimized for mobile devices**: The website must be responsive and mobile-friendly for tablets and smartphone devices to meet the demands and digital usage of our members and staff.

• **Platform/browser**: The site must be compatible with Windows and Mac platforms and Chrome, Firefox, Safari, and Microsoft Edge browsers.

• **Data visualization**: Both the public-facing and members-only sites should have access to visualization tools (e.g., Tableau, Power BI) for dashboards.
  - The members-only site should have the added functionality for querying data and downloading complete data sets.

### Questions for Suppliers

1. **Company**
   a. Please provide a general overview of your company.
   b. How many institutions use your organization’s solutions in Canada?
   c. Please provide any suggestions to help COU conduct a successful RFP process for this project.
   d. Do you foresee any challenges meeting any specifications or standards required by COU, such as:
      i. Accessibility for Ontarians with Disabilities Act (AODA)

2. **Product**
   a. Describe the proposed solution that you currently offer and how the solution would support the activities listed in Appendix A.
b. Identify any mandatory requirements you consider problematic and offer alternative solutions to address their intent where possible.
c. Identify if any mandatory requirements should be reconsidered and offer justification for reconsideration.
d. Please describe how the solution can be delivered, for example:
   i. On premise;
   ii. Software as a Service (SaaS);
   iii. Hybrid; or
   iv. Externally managed.
e. If describing any of the options above from ii-iv, please indicate if the solution would use data centres located in Canada.
f. Please provide any lessons learned that will help COU be successful with the implementation of the COU Data Hub.
g. Please list and describe your out-of-the-box available solutions.
   i. Please include customization possibilities.
h. Please describe the solution’s workflows and how they can easily be configured to match business rules/needs.
i. Please describe the solution’s data integration capabilities.
j. Describe training and support options for COU.

3. Licensing
   a. Please describe the license model for the solution.
   b. Please provide an estimate for the implementation of the solution at COU (one-time costs and recurring costs).

4. Services
   a. Please describe the professional services available to implement and deploy the solution for COU.
   b. Please include cost model and example costing for typical implementation and deployment to the scale of a membership organization such as COU.
   c. Describe availability of resources and support in proximity to Toronto.

All RFI responses submitted to COU under this Bid Document become the property of COU. COU may need to share provided material with members who assist in decision-making, but will honour requests for portions of the material to be treated confidentially, e.g., pricing or product roadmap information. Selected Proponents may also be asked to present in person or by videoconference to COU staff and sector representatives in a session lasting up to ninety (90) minutes.

Subsequent to this Request for Information, a Request for Proposal may be issued should COU decide to continue with this project.
Submission Details

COU will accept RFI responses via email on or before the closing date and time of: **October 8, 2021 at 5pm local time**. COU accepts no responsibility or liability for misdirected, unreadable, or incomplete Proposals.

All RFI responses and accompanying documents must be emailed to Shelly Nixon (snixon@cou.ca).

COU will NOT accept hard copy responses. Proponents shall submit their documents as a single PDF.

For additional information relating to this RFI process, please contact Shelly Nixon, Director, Data and Policy (snixon@cou.ca). Thank you for your interest.
## APPENDIX A: MANDATORY REQUIREMENTS

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<tr>
<th>Functionality Goal</th>
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<tr>
<td><strong>Public-facing platform</strong></td>
<td>Ability to select, visualize, and manipulate publicly-available data sets; including customization by year, institution (or system-wide), and category.</td>
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<td>Ability to download publicly-available data sets in multiple formats (.xlsx, .csv, .tab, etc.).</td>
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<td>Ability to customize downloaded data (i.e., for all universities or for only those universities that have been selected by the user).</td>
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<td>Search bar to help users easily access specific data sets and information.</td>
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<td>User-friendly data visualization tools (such as Tableau or power BI).</td>
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<td>Links to individual university websites, the Ontario University Application Centre (OUAC), and Ontario’s Universities (OU).</td>
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<td><strong>Private platform</strong></td>
<td>Accessed through secure login process; ideally linked to the COU Members’ Portal accounts.</td>
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<td>Ability to upload and download data sets in multiple formats.</td>
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<td>Ability to control access and permissions to separate data sets by a COU administrator.</td>
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<td>Email notification system to alert users that new content has been posted.</td>
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<td>User-friendly data visualization and analytics tools (such as Tableau or Power BI).</td>
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<td><strong>File hosting</strong></td>
<td>Ability to host a variety of data files in multiple formats.</td>
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<td>Ability to control access and permissions to particular files and folders by a COU administrator.</td>
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<td>Automatic email notifications to users when new files are uploaded.</td>
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<td>Easy access and navigation to data sets.</td>
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<td>Ability to classify data sets with metadata to make them easier to search.</td>
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<td>Easy to upload/download from network drive.</td>
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<td>Different access levels depending on permission level.</td>
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