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| HEQCO 24/25-RFP-001 RESPONSE TEMPLATE |

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|  **RFP Number** |  24/25-RFP-001 |
|  **RFP Title** | Consortium on Generative Artificial Intelligence (AI) |
| **Proposed Budget Range of RFP** | To be completed by applicant |
| **Issue Date of RFP** | June 19, 2024 |
| **Deadline for Questions or Clarifications to RFP** | August 15, 2024, 5:00 p.m. EST |
| **Proposal Submission Deadline/Time** | September 20, 2024, 5:00 p.m. ESTLate applications will not be accepted.  |
| **HEQCO Contact for Enquiries Regarding RFP** | rfp@heqco.ca |
| **Title of Proposed Project** | To be completed by applicant |
| **Description of Proposed Project** | To be completed by applicant |

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| CONTACT INFORMATION |
| **Organization/Company/Institution** |  |
| **Primary Contact – Name and Title** |  |
| **Primary Contact – Mailing Address** |  |
| **Primary Contact – Phone Number** |  | **Email** |  |
| **Name(s)/Title(s)/Contact Information of Project Co-Leads** (if applicable) |  |

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| Assignment Description |

### *1. About HEQCO*

The Higher Education Quality Council of Ontario (HEQCO) is an independent agency of the Government of Ontario that conducts research and provides evidence-based recommendations to government to improve the accessibility, quality and sustainability of Ontario’s publicly assisted colleges and universities. HEQCO employs a multifaceted research approach to inform the implementation of meaningful policies that improve postsecondary education in Ontario, Canada and around the world.

### *2. Description of Assignment*

**Background**

The emergence of ChatGPT in November 2022 marked a pivotal moment in higher education. Its rapid rise and use [resulted in mixed reactions](https://evolllution.com/facing-higher-educations-ai-future) within the postsecondary sector — from fear and skepticism to interest and enthusiasm — regarding the potential uses and impacts of generative artificial intelligence (AI). As this technology continues to evolve, it will become impossible to avoid and will yield long-term impacts across sectors, as signaled through the Federal Government’s [$2.4 billion investment](https://budget.canada.ca/2024/report-rapport/chap4-en.html) in AI-related initiatives in its 2024 budget.

Generative AI is here to stay, and postsecondary institutions need to consider how they can leverage its potential to support access, quality and sustainability in higher education. Institutions in Canada have already begun developing AI guidelines and exploring the possible roles and impacts of this fast-growing technology. As institutions consider the opportunities that generative AI presents, further research and knowledge sharing are needed to inform the development and implementation of AI-related practices at Ontario postsecondary institutions.

**Purpose and Expectations**

The purpose of this RFP is to select education/training providers and other stakeholders to join a newly established HEQCO Consortium on generative AI. The Consortium will provide evidence-based research to inform policies and practices around generative AI in Ontario by addressing the following questions:

* How can generative AI be used to promote access, quality and sustainability in postsecondary education in Ontario?
* How can postsecondary institutions use generative AI in effective and ethical ways to support learning and operations?

HEQCO is interested in supporting projects and innovations that focus on constructively using generative AI across a number of topics outlined below. Proposals will be evaluated in groups organized by topic to ensure the Consortium addresses an adequate breadth and range of issues. Proposals should focus on the use and/or impact of AI in one or more of the following areas:

* Accessibility (e.g., tools used to support inclusive learning)
* Institutional operations (e.g., using AI in student services)
* Legal implications (e.g., aligning law, policy and practice to maximize AI opportunities and mitigate risks)
* Preparation for labour market (e.g., using AI in experiential learning activities)
* Teaching and learning (e.g., tools used to support curriculum design)
* Other issues related to the use and/or impact of AI in higher education

Projects may last anywhere from six months to two years and may include a variety of approaches, including but not limited to case studies, evaluations of widely available AI tools or literature reviews.

Specifically, we seek partners that are prepared to:

* commit to sharing research insights through up to four deliverables (three interim and one final report over a two-year period) that HEQCO may convert into blogs, webinars and/or shared resources. Projects should be designed so that new findings can be shared in six-month intervals.
* collaborate with HEQCO and other consortium members on various knowledge mobilization strategies, such as co-authoring reports, blogs and/or resources; organizing or presenting at conferences and events; and participating in HEQCO conferences and webinars to share their approaches and learnings with other Consortium members and the broader postsecondary community.

Projects should commence no later than February 1, 2025 and may continue until February 28, 2027. HEQCO will cover research costs up to a maximum of $70,000 per project, per year. For the 2024 intake, we expect to fund between four and eight projects (each led by a unique partner), depending on the quality and appropriateness of the proposals we receive. Preference will be given to Ontario postsecondary institutions, though other organizations (e.g., community organizations and research institutes) and agencies and institutions in other jurisdictions are encouraged to apply.

If successful in securing HEQCO funding, applicants will be expected to fine-tune project plans in collaboration with HEQCO researchers. Applicants should identify their real and in-kind contributions to their project, both of which are expected. Successful applicants will be required to enter into a contract with HEQCO, which will include standard terms and conditions of the agreement for project funding. They will also participate in regularly scheduled knowledge exchanges and report on the outcomes of their projects at regular intervals using a template, which HEQCO will provide. HEQCO will publish deliverables (e.g., blogs, resources) from some or all projects and may develop a report that draws from project insights and offers recommendations for enhancing AI-related practices in postsecondary education. HEQCO will support and cover all administrative and meeting costs for the Consortium.

If HEQCO determines that additional information (e.g., clarifications and/or addenda) relating to this RFP should be provided, such information will be sent to all vendors by email and/or posted on the HEQCO website. This information is considered part of the RFP and may modify certain terms and conditions of the original document.

### *3. Deliverables*

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| **RESEARCH PROPOSAL** |
| 1. **BACKGROUND**
* Outline how the proposed project addresses HEQCO’s research questions and topics of interest.
* Provide a thorough introduction and background that clearly outlines the issue to be explored and why it is important in the Ontario context.
* Synthesize recent literature and provide a conceptual framework for the project.

 **(15%)** | **PROPONENT TO RESPOND** |
| 1. **METHODOLOGY**
* Provide a clear and comprehensive explanation of all steps required to complete the project.
* Provide a list of the research questions you will be examining.
* Describe the data that will be collected or used to answer each research question.
* Outline the best-case outcomes for this project. How might government bodies, academics and/or policymakers take up or apply the findings?

**(20%)** | **PROPONENT TO RESPOND** |
| 1. **CHALLENGES**
* Identify and address how you will resolve any potential challenges in terms of your research approach.
* Consider challenges such as research ethics board delays, data availability, low survey response rates and/or recruitment challenges.

**(5%)**  | **PROPONENT TO RESPOND** |
| 1. **EXPERIENCE**

**General*** Summarize the past experience of the research team/organization, showing how this experience is relevant to PSE-related and HEQCO-funded research projects.

**RFP specific*** Explain how the academic training, qualifications and past experience of the research team are relevant to the research topic of this RFP.

**(10%)** | **PROPONENT TO RESPOND** |
| 1. **KNOWLEDGE MOBILIZATION**
* HEQCO reserves the first right to publish outcomes from the Research Consortium. Following that, Consortium members are encouraged to mobilize knowledge. Describe your intended knowledge mobilization strategies, e.g., journal articles, webinars, blog posts and/or conference presentations.

**(10%)** | **PROPONENT TO RESPOND** |
| 1. **PROJECT MANAGEMENT**
* Identify the roles and responsibilities of team members as appropriate (data collection, data analysis, writing, editing, etc.).
* Outline your plan for ongoing communication and collaboration between the research team, HEQCO and any other partners or collaborators.
* Provide expected due dates and descriptions for your project deliverables. Ensure the timelines, milestones and planned overall approach are realistic for this research project.

(**10%)** | **PROPONENT TO RESPOND**  |
| 1. **RESEARCH BUDGET**

Using the information provided in the *Research Budget* section, your budget will be evaluated against the following criteria:* Is the overall budget for this research project realistic?
* Are the various budget components in line with HEQCO policy?
* Is the proposed work likely to be successfully accomplished with the budget proposed?

**(10%)** | **TO BE COMPLETED BY HEQCO EVALUATOR**  |
| 1. **PRICING EVALUATION**
* Refer to pricing evaluation formula in RFP instructions for an explanation of how points are calculated.

**(10%)** | **TO BE COMPLETED BY HEQCO COORDINATOR** |
| 1. **QUALITY OF RESPONSE**
* Is it clear that the proponents have understood the objective of the original RFP and responded accordingly?
* Is the proposal written in a way that is easy to comprehend and evaluate?

**(10%)** | **TO BE COMPLETED BY HEQCO EVALUATOR** |

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| **RESEARCH BUDGET** |
| Please complete the project budget Excel template.Please include ALL anticipated costs for the project, including in-kind\* and other costs *(in italics and without bold)* for which HEQCO funding is not being requested.\* We recommend, where applicable, that proposals include estimates of the per-day/semester costs for faculty/senior administrators that are providing in-kind support to the research project, as well as any other contributions being made to the research by your institution. This will allow us to have a better sense of the true cost of the overall research project and the contribution that is being made by the partner and their personnel. |

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| **REFERENCES: PAST FUNDED RESEARCH WITH HEQCO** (IF APPLICABLE)*(insert additional rows if necessary)* |
| **HEQCO Project Lead** |  | **HEQCO Contract #** |  |
| **HEQCO Project Name** |  |
| **HEQCO Project Lead** |  | **HEQCO Contract #** |  |
| **HEQCO Project Name** |  |
| **HEQCO Project Lead** |  | **HEQCO Contract #** |  |
| **HEQCO Project Name** |  |

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| **REFERENCES: RELEVANT RESEARCH/EXPERIENCE (PROVIDE A MINIMUM OF TWO)***(insert additional rows if necessary)* |
| **Contact Name, Title and Organization** |  |
| **Contact Telephone #** |  | **Email** |  |
| **Project Name:** (if applicable) |  |
| **What/whom will reference be provided for?** i.e., Individual/Organization/ Project  |  |
| **Contact Name, Title and Organization** |  |
| **Contact Telephone #** |  | **Email** |  |
| **Project Name** (if applicable) |  |
| **What/whom will reference be provided for?** i.e., Individual/Organization/Project  |  |
| **Contact Name, Title and Organization** |  |
| **Contact Telephone #:** |  | **Email** |  |
| **Project Name** (if applicable) |  |
| **What/whom will reference be provided for?** i.e., Individual/Organization/Project  |  |

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| **SIGNATURES** |
| **Conflict of Interest**Affirmation that neither the vendor nor the staff have any real or perceived conflict of interest in performing the assignment. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature of Principal Investigator or Official Representative of Vendor Institution/Organization |
| **Vendor’s Signature of Offer**Affirmation by an individual with the authority to bind the ‘supplier’ institution/organization | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature of Official Representative of Vendor Institution/Organization |
|  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Name, Title and Legal Name of Vendor Institution/Organization |

**Tax Compliance Declaration**

The Ontario Government expects all suppliers to meet their Ontario tax obligations on a timely basis. In this regard, proponents are advised that their Ontario tax obligations, if any, must be in good standing in order to be considered for a contract award. In order to be considered for a contract award, the proponent must submit the following tax compliance status statement and the following consent to disclosure:

**Declaration**

I/We hereby certify that \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***(insert legal name of proponent)*** (the “Proponent”) at the time of submitting this proposal is in full compliance with all applicable Ontario statutes, whether administered by the Ontario Ministry of Finance or by the Canada Revenue Agency, and that, in particular, all returns required to be filed have been filed and all taxes due and payable under those statutes have been paid or satisfactory arrangements for their payment have been made and maintained; or the Proponent will take all necessary steps prior to being considered for contract award in order to be in full compliance with all applicable Ontario tax statutes.

**Consent to Disclosure**

The Proponent consents to the Higher Education Quality Council of Ontario releasing the taxpayer information to the Ministry of Finance as necessary for the purpose of verifying the Proponent’s compliance with Ontario tax statutes.

The Proponent consents to the Ministry of Finance releasing taxpayer information to the Higher Education Quality Council of Ontario as necessary for the purpose of verifying the Proponent’s compliance with Ontario tax statutes.

Dated at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ this \_\_\_\_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 20 \_\_\_\_.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Signature of an authorized signing officer)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Print Name)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Title)

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**HEQCO REQUEST FOR PROPOSAL (RFP) INSTRUCTIONS**

**PROPOSAL SUBMISSION INSTRUCTIONS**

**The Higher Education Quality Council of Ontario (HEQCO) is in compliance with the *Accessibility for Ontarians with Disabilities Act, 2005* and its regulations as applicable. To request HEQCO material in alternative formats, please contact** **info@heqco.ca****.**

Proposals are to be submitted according to the following method:

1. **Proposal submission must contain one (1) electronic copy of:**

1. **Proposal Response Template** in Microsoft Word format or PDF, signed by an authorized representative. Electronic signatures are valid.
2. **Appended documents** in Microsoft Word format or PDF.
3. **Tax Compliance form**, if applicable.

1. The Proposal Response Template and all corresponding appendices must be fully completed in order for your submission to be considered for evaluation.

1. Proposals must be sent electronically to **rfp@heqco.ca** and received by the proposal submission deadline date and time (EDT).  **It is the responsibility of the bidder to ensure that the RFP reaches HEQCO by the date and time cited in the Proposal Response Template. Proposals received after the deadline will not be considered.**

**Correspondence**

All correspondence, including questions relating to this RFP, must be submitted to RFP@heqco.ca. Please quote the RFP# in your correspondence.

If HEQCO determines that additional information (e.g., clarifications and/or addenda) relating to this RFP should be provided, such information will be sent to all vendors by e-mail and/or posted on the HEQCO website. This information is considered part of the RFP and may modify certain terms and conditions of the original document.

Vendors are responsible for providing HEQCO with the correct e-mail address to which any additional information or addenda should be sent. **WORK ASSIGNMENT COSTS**

**Research Project Budget**

The submitted proposal is to include all professional fees and materials necessary for the completion of the Assignment. The bidder must provide a detailed breakdown of the following costs in the **Research Budget** section of the **Proposal Response Template**.

The Research Budget section must include detailed information on:

1. **Personnel:** salaries and benefits or stipends, specified by rate and time required.

**Note:** HEQCO has introduced guidelines that do not allow for daily or semester rates to be charged for faculty and senior administrators who are involved in HEQCO-funded research projects. These charges should be considered in-kind contributions and reported as such.

In *exceptional circumstances*, if a teaching release is required to provide backfill for a faculty member or administrator involved in the research project, HEQCO may fund the hiring of a part-time instructor at the college/university in question at the prevailing per semester rate.

1. **Direct costs:** actual costs incurred, if applicable (e.g., specialized supplies, equipment leases, software and incentives for participation).

**Note:** HEQCO strongly discourages the purchase of equipment that is to be used for research projects. However, HEQCO will reimburse the contractor/institution for the period during which leased equipment will be used for completing the research.

HEQCO will also reimburse for the costs of incentives for participation in research (e.g., gift cards and prizes for survey participation). For focus groups, the maximum charge is $100 per focus group.

1. **Travel:** indication of number of trips and costs, including accommodation, if applicable.

**Note:** HEQCO will not reimburse contractors for the following: meals, snacks, beverages, gratuities, laundry, dry cleaning, valet services, dependent care and personal telephone calls. Also, HEQCO is only able to reimburse economy-class travel.

1. **Overhead:** HEQCO’s approved overhead rate is 10%.

**Note:** An amount for overhead, if applicable maybe allowed if the contractor is an institution and researchers will have use of space and resources (such as computers, copiers, printers) at the institution.

Overhead will be applied to personnel costs, direct costs and travel costs. This means that the 10% overhead will be applied to the *entire HEQCO-funded portion* of research budgets for projects. If travel costs are included in the budget and 10% overhead is paid on them, institutions must be able to verify and document the overhead costs.

**Milestone Payments**

Payment of prices will be made by milestone payments against invoices submitted upon completion of the deliverables and acceptance of deliverables by HEQCO. Please note that should your proposal be successful and awarded a contract, 40% of the HEQCO-funded portion will be withheld until acceptance of the final deliverable. This 40% will be split into two equal payments: one payment is released upon acceptance of a final draft; the second is released after copyediting is completed. Note, copyediting will be arranged and paid for by HEQCO.

**Harmonized Sales Tax (HST)**

On July 1, 2010, the Province of Ontario implemented the Harmonized Sales Tax (HST). In the past, the government was exempt from payment of GST but will be paying HST on affected purchases after July 1, 2010.

 **EVALUATION OF**

**Evaluation**

The evaluation of proposals is carried out by an evaluation team and can be composed of HEQCO employees or a combination of both internal and external personnel. Proposals are evaluated in two phases.

In stage one, evaluators use the evaluation rubric (outlined in the Proposal Response Template) to evaluate the proposals and rank them for further evaluation and/or disqualification. Proposals are evaluated using a 5-point scale based on the extent to which they address the criteria outlined in the template and the level of detail provided.

In stage two, the successfully ranked proposals are evaluated using the references provided. This includes past performance on funded research projects (if applicable) and the non-HEQCO references bidders are required to provide. Non-HEQCO references can include references for the organization or individual team members. **Please note that having no past work experience with HEQCO will not negatively influence the evaluation.**

Final decisions are a combination of the evaluation rubric score, HEQCO’s own assessment of past work with the bidder (if applicable) and feedback that non-HEQCO references provide.

**Pricing Evaluation of Proposals**

A component of the evaluation is based on a relative pricing formula using the price set out in the **Research Budget** section of each submission. Each bidder will receive a percentage of the total possible points allocated to the total price (HST excluded) it has bid, by dividing that bidder’s total price into the lowest total price that was proposed.

For example, if the lowest total bid price for a particular category is $120, that bidder receives 100% of the possible points for their total price (120/120x10 =10 points), a bidder who bids a total price of $150 receives 80% of the possible points for their total price bid (120/150x10 = 8 points) and a bidder who bids a total price of $2100 receives 5.7% of the possible points for their total bid price (120/2100x10 =0.57 point).

**Based on the example above:**

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| **Lowest Total Price** --------------------------- Lowest Total Price  |  x 10 = 10 Points   | **For the proposal with thelowest total price**   |

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| **Lowest Total Price** --------------------------- 2nd Lowest Total Price  |  x 10 = 8 Points   | **For the proposal with 2nd lowest total price**   |

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| **Lowest Total Price** --------------------------- 3rd Lowest Total Price  |  x 10 = 0.57 Points   | **For the proposal with 3rd lowest total price**  |

**ADMINISTRATION**

* HEQCO may extend the Proposal Submission Deadline for a reasonable amount of time.
* Although HEQCO will take care in the preparation and provision of information or addenda in relationship to this RFP, HEQCO will not be responsible for any delay, damage, loss or inconvenience that may be incurred in the event of technical malfunction or administrative error, without limitation*.*
* HEQCO reserves the right to accept, modify or reject all or part of the submitted proposal.
* The lowest-priced bid may not necessarily be selected.
* HEQCO reserves the right to cancel or change this RFP at any time without penalty.
* HEQCO reserves the right not to award any contract.
* There will be no payment for responding to this RFP.
* All information obtained by the vendors in connection with this RFP is the confidential property of HEQCO. It must not be used for any other purpose other than replying to the RFP and fulfilling any subsequent contract, if awarded.
* All information received by HEQCO from the vendors in connection with this RFP will be retained for disclosure under established procedures. Under the *Freedom of Information and Protection of Privacy Act*, HEQCO cannot guarantee the confidentiality of submitted information. Any proprietary or confidential information should be identified as such and any desired treatment indicated in the submission.

The successful vendor selected for this assignment will be required to sign an agreement.

For all answers to questions or clarifications please visit the following link:

<http://heqco.ca/en-CA/Research/Requests%20for%20Proposals/Pages/Home.aspx>

Answers will be posted approximately three business days after the deadline. They will also be emailed to all proponents.

**No Liability**

HEQCO is not liable for any expenses, costs, losses or any direct or indirect damages incurred or suffered by any vendor or third party resulting from HEQCO exercising its expressed rights under this RFP or exercising any rights that may be implied in the circumstances.