

RFP 16/17-RFP-030 PROPOSAL RESPONSE TEMPLATE

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RFP Number:	16/17-RFP-030
RFP Title:	Relationship Between PSE Participation and Household Income
Proposed Budget Range of RFP:	
Issue Date of RFP:	Tuesday, November 22, 2016
Deadline for Questions or Clarifications to RFP:	Tuesday, December 6, 2016 by 5:00 pm EDT
Proposal Submission Deadline/Time:	Tuesday, December 27, 2016 by 5:00 pm EDT
HEQCO Contact for Enquiries Regarding RFP:	rfp@heqco.ca
Title of Proposed Project:	
Description of Proposed Project:	

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)	

SECTION A - ASSIGNMENT DESCRIPTION

A.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 objective advice to government to improve the accessibility, quality and accountability of Ontario's public 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.

As a government agency, HEQCO supports research that has an impact on policy makers, postsecondary institutions, students and the public. With this in mind, please describe in your proposal the dissemination strategy that you plan to use to share the results of your research. Please be as specific as possible, listing the avenues you will use, the communities you hope to target and the impact you hope your research will have.

A. 2 Description of Assignment

Equitable access to postsecondary education is a research priority for HEQCO and a key focus for the Government of Ontario. Despite significant strides made in overall enrolment and attainment levels over the past several years, postsecondary access, retention and success continue to be a challenge for underrepresented groups, such as first-generation students, students with disabilities, low-income students, indigenous students and students whose first language is not English.

The socio-economic status (SES) of a student's family has an overwhelming and complex influence over the student's decision to continue on to and succeed at postsecondary education. While there are many ways to capture family SES, one key indicator is that of household income. There is a strong consensus in the academic literature that a positive and sizeable relationship exists between postsecondary participation and household income.

Many studies confirming this relationship have been conducted in Canada using survey data collected by Statistics Canada, such as the Youth in Transition Survey (YITS), the Survey of Labour and Income Dynamics (SLID), and the Postsecondary Education Participation Survey (PEPS). However, these surveys ended in the late 2000s and no new surveys have taken their place. As a result, the research into the relationship between household income and PSE participation has remained stagnant and hasn't reflected or evaluated recently adopted policies aimed at increasing PSE accessibility, such as the reforms to the Ontario Student Assistance Program.

This RFP invites proposals for a study that utilizes data in innovative and effective ways to explore recent developments in the PSE participation of Ontario students in relation to their socio-economic backgrounds. The study can make use of existing datasets, such as the Labour Force Survey (LFS) and the Longitudinal Administrative Dataset (LAD); it can also propose methods to create new linkages between datasets to compensate for existing data gaps.

Research Questions:

Applicants are invited to submit proposals that utilize data to address the following questions:

1. What is the relationship between household income (or other indicators of family SES) and PSE participation in Ontario and the rest of Canada? How do results in recent years compare to historical trends extending back to the mid-1990s?

2. What are the characteristics of students who come from disadvantaged economic backgrounds? Do these characteristics overlap with those of students who typically do not move on to postsecondary education?
3. How have policy changes made in Ontario since the mid-1990s, especially those affecting student financial aid, influenced the relationship between household income and PSE participation rates?

A. 3 Deliverables

The final report (approximately 40 pages) should be submitted within eight months following the RFP closing date.

RESEARCH PROPOSAL:	
<p>1) BACKGROUND:</p> <ul style="list-style-type: none"> • Provide a clear and thorough introduction and background, illustrating that the proposed project is grounded in relevant research. • Synthesize recent literature and provide a conceptual framework for the project. <p>(10 POINTS)</p>	<p>PROPONENT TO RESPOND</p> <p>SUGGESTED # OF WORDS: 500-700</p>
<p>2) METHODOLOGY – PART A:</p> <ul style="list-style-type: none"> • Provide a clear and comprehensive explanation of all steps that will be required to complete the project. • Ensure that you appropriately address the research questions asked. <p>(20 POINTS)</p>	<p>PROPONENT TO RESPOND</p> <p>SUGGESTED # OF WORDS: 500-1,000</p>
<p>3) METHODOLOGY – PART B:</p> <ul style="list-style-type: none"> • State what will be measured, how it will be measured and why the measures are appropriate; • Include a detailed description of the data collection, instrumentation, and/or statistical methods to be used. <p>(10 POINTS)</p>	<p>PROPONENT TO RESPOND</p> <p>SUGGESTED # OF WORDS: 500-1000</p>

<p>4) CHALLENGES:</p> <ul style="list-style-type: none"> Identify and address how you will resolve any potential challenges in terms of your research approach. Consider challenges such as research ethics board delays, low survey response rates and recruitment challenges. <p>(10 POINTS)</p>	<p>PROPONENT TO RESPOND</p> <p>SUGGESTED # OF WORDS: 300-600</p>
<p>5) EXPERIENCE:</p> <p>General:</p> <ul style="list-style-type: none"> Summarize past experience of the research team/organization, showing how this experience is relevant to PSE-related and HEQCO-funded research projects. <p>RFP-specific:</p> <ul style="list-style-type: none"> Explain how the academic training, qualifications and past experience of the research team are relevant to the research topic of this RFP. Include CVs of research team members as an addendum. <p>(10 POINTS)</p>	<p>PROPONENT TO RESPOND</p> <p>SUGGESTED # OF WORDS: 300-600</p>
<p>6) PROJECT MANAGEMENT:</p> <ul style="list-style-type: none"> 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. In the Milestones section, include due dates, descriptions and payment amounts for your project deliverables. Ensure the timelines, milestones and 	<p>PROPONENT TO RESPOND</p> <p>SUGGESTED # OF WORDS: 250-500</p>

<p>planned overall approach are realistic for this research project.</p> <p>(10 POINTS)</p>	<p>MILESTONES:</p> <p>Due date</p> <table border="1" data-bbox="656 210 1534 487"> <tr> <td>Due date</td> <td>Deliverable description</td> <td>\$</td> </tr> <tr> <td>Due date</td> <td>Deliverable description</td> <td>\$</td> </tr> <tr> <td>Due date</td> <td>Final report</td> <td>\$</td> </tr> </table>	Due date	Deliverable description	\$	Due date	Deliverable description	\$	Due date	Final report	\$
Due date	Deliverable description	\$								
Due date	Deliverable description	\$								
Due date	Final report	\$								
<p>7) RESEARCH BUDGET:</p> <p>Using the information you provide in the <i>Research Budget</i> section (below), your budget will be evaluated against the following criteria:</p> <ul style="list-style-type: none"> • Is the overall budget for this research project realistic? • Are the various budget components in line with HEQCO policy and past experience? • Is the proposed work likely to be successfully accomplished within the budget proposed? <p>(10 POINTS)</p>	<p>TO BE COMPLETED BY HEQCO EVALUATOR</p>									
<p>8) PRICING EVALUATION:</p> <p>Refer to pricing evaluation formula in RFP instructions for an explanation of how points are calculated.</p> <p>(10 POINTS)</p>	<p>TO BE COMPLETED BY HEQCO COORDINATOR</p>									
<p>9) QUALITY OF RESPONSE:</p> <p><i>Your proposal will be evaluated against the following criteria:</i></p> <ul style="list-style-type: none"> • 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? <p>(10 POINTS)</p>	<p>TO BE COMPLETED BY HEQCO EVALUATOR</p>									

RESEARCH BUDGET:

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 institution and its personnel.

PERSONNEL:

Name of Proposed Team Members <i>(insert additional rows if necessary)</i>	Title/Position	# of Days/ Semesters	Per Day/ Semester Rate	Total: # x Rate
			\$	\$
			\$	\$
			\$	\$
Personnel Costs Subtotal				\$

DIRECT COSTS:

Detailed Description of Direct Costs (if applicable) <i>(insert additional rows if necessary)</i>	Cost	
	\$	
	\$	
	\$	
Direct Costs Subtotal		\$

TRAVEL AND ACCOMMODATION:

Detailed Description of Travel and Accommodation (if applicable) <i>(insert additional rows if necessary)</i>	Cost	
	\$	
	\$	
	\$	
Travel and Accommodation Subtotal		\$

OVERHEAD:

A detailed description of what constitutes overhead must be provided (if applicable) <i>(insert additional rows if necessary)</i>	Cost	10% of Cost
	\$	\$
	\$	\$
	\$	\$
Overhead Subtotal		\$

FUNDING:	
Personnel Costs Subtotal	\$
Direct Costs Subtotal (if applicable)	\$
Travel and Accommodation Subtotal (if applicable)	\$
10% of Overhead Total (if applicable)	\$
Firm Fixed Price (HEQCO Funding)	\$
HST (13%) (if applicable)	\$
Total HEQCO Funding(Firm Fixed Price + HST)	\$
In Kind Contribution	\$
Total Project Cost (Total HEQCO Funding + In Kind)	\$

REFERENCES: PAST FUNDED RESEARCH WITH HEQCO (IF APPLICABLE) <i>(insert additional rows if necessary)</i>			
HEQCO Project Lead:		HEQCO Contract #:	
HEQCO Project Name:			
HEQCO Project Lead:		HEQCO Contract #:	
HEQCO Project Name:			
HEQCO Project Lead:		HEQCO Contract #:	
HEQCO Project Name:			

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

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Contact Name, Title and Organization:			
Contact Telephone #:		Email:	
Project Name: (if applicable)			
What/whom will reference be provided for? i.e., Individual/Organization/Project			

SIGNATURES:	
Conflict of Interest: Affirmation that neither the vendor nor the staff have any real or perceived conflict of interest in performing the assignment.	<hr/> 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	<hr/> Signature of Official Representative of Vendor Institution/Organization
	<hr/> 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)

(Phone Number)

(Fax Number)