

**2024 Operational Transformation Review RFP**  
**Addenda re: Questions/Answers**

<b>1</b>	<b>What is the expected budget range your team is looking for in this review project?</b>
	\$100,000 -\$150,000
<b>2</b>	<b>Considering the tight timelines, can the RFP submission deadline be extended by a week from June 10 to June 17?</b>
	Yes. A revised timeline will be posted early next week.
<b>3</b>	<b>What is driving the timeline of this engagement? Given our experience, the summer months typically present a challenge to engage internal stakeholders. Does the organization have any flexibility in the timeline should this challenge materialize?</b>
	We are eager to initiate and complete the review, however we are most interested in achieving a quality output and therefore are open to your proposal of alternative timelines.
<b>4</b>	<b>Is there any blackout period during which we are unable to engage with your team (e.g. during the start of the fall term)?</b>
	No.
<b>5</b>	<b>Is the vendor expected to execute the project on the university's premises (i.e., in person) or remotely? If the vendor is expected to be on site, would the university provide the vendor with a dedicated workspace equipped with necessary tools (e.g., whiteboards, projectors, wi-fi access)?</b>
	We are open to in-person or online engagement with stakeholders. We do not require the vendor to be on site for the whole project. If on site will have a dedicated workspace with the necessary tools.
<b>6</b>	<b>If the vendor requires resourcing changes due to staffing availability, is there any concern with replacing individuals with equivalent skills, backgrounds, and rates after the awarding of the contract?</b>
	This is acceptable as long as the primary contact at King's is informed.
<b>7</b>	<b>In SCHEDULE B – BIDDER REFERENCES - Bidders are asked to provide three (3) references from clients who have obtained similar services in the last three (5) years. Could King's clarify whether the references should be projects completed within the last three (3) or five (5) years.</b>
	The intention was to allow references within the last five (5) years.
<b>8</b>	<b>Do you have a preference between a presentation deck or word document for the response?</b>
	It does not matter but we do prefer pdf format.
<b>9</b>	<b>Is there an incumbent firm currently engaged and invited to participate in this response? If so, which firm is King's currently working with?</b>
	We are currently working with StrategyCorp on our strategic plan and they have been invited to bid. All bids will be considered fairly.
<b>10</b>	<b>How many firms, in total, have been invited to propose for this Request for Proposal?</b>
	There were 2 invitations sent in addition to the posting on the King's webpage and Biddingo.
<b>11</b>	<b>We understand that each bid will be rated on a scale of 1-10 by the Committee members, however, is there a weighting/score for each required component of the RFP response that can be shared?</b>
	Attachment 1 – Evaluation Criteria / Submission Requirements contains the complete list of evaluation criteria that will be used to evaluate each bid. Weightings are being reviewed currently and will be posted as an addenda as soon as they are finalized.

12	<p>Will there be project team or steering group in place for the selected vendor to work with? If so, can you share more information about that teams makeup?</p> <p>Would we have the opportunity to engage with the senior leadership team for this project (President, VPs and directors)?</p> <p>Who from the King’s team will conduct the interviews? What role do they hold within the organization?</p> <p>Could King’s provide more insights into the project/staff resources available to support this review? Are there any limitations or constraints the vendor should consider while proposing our services?</p>
	<p>The Manager of the President’s Office will be the primary contact at King’s for this project. Through the Manager the project team will be able to engage with King’s Executive Team (President and Vice-President), as well as Directors as required.</p> <p>The selection committee is anticipated to include two board members, the president, and two vice-presidents.</p>
13	<p>For the review of: “Information technology systems and reporting; human resources; physical infrastructure, strategic enrolment management”; would it be fair to consider this an assessment of your Enterprise resource planning (ERP) Software and Student Information Systems and physical computing assets (as opposed to real estate assets)? Or the broader policies and procedures around these areas?</p>
	<p>Real Estate would be excluded. Software and Student Informations systems are not expected to be a focus of this review as in some cases these are reliant on choices made by Western. The intent is a review of the policies and processes around the items listed.</p>
14	<p>Please elaborate what is meant by “any potential exclusions” (pg. 9) required in the executive summary?</p>
	<p>Any services sought by King’s in the RFP which the bidder is unable to provide.</p>
15	<p>When you refer to “Information technology systems and reporting” – is it reporting as in organizational structure or model redesign? Or the reporting of information (generating reports) from the data in the IT systems?</p>
	<p>The latter.</p>
16	<p>What are the administrative functions to be assessed?</p>
	<p>A key part of this project will be reviewing the organizational structure of the senior administrative positions including the positions of President, Vice-President, and Directors.</p>
17	<p>Will the same assessment be conducted (as mentioned in the RFP) for each individual admin function?</p>
	<p>No.</p>
18	<p>Is a review of the compatibility of King’s University College and Western University’s administrative functions in scope for this project?</p>
	<p>No.</p>
19	<p>Can you confirm that all academic functions, processes, resources, and technologies are out of scope?</p>
	<p>Generally yes, with the exception of identification of any administrative functions that should be reporting to the Vice-President and Academic Dean or Associate Deans.</p>
20	<p>Please list all the administrative functions within this operational review’s scope. While there are references to certain functions such as Finance, IT, HR, etc. as being included in scope, it is</p>

	unclear whether areas such as Marketing, Communications, Registrar, Student Services, etc. are also considered. Please provide the complete list of in-scope functions.
	The seven areas are intended to identify key themes which apply to all units, all units would be included in the review.
21	Can you provide the following for each in-scope function: Number of full-time and part-time staff (any organizational charts to support this would be helpful). Number and description of processes executed by the function.
	Review of the admin structures of individual units is not an intention of this RFP. This refers more to processes and procedures. This data can be available for specific functions as needed once the review is underway.
22	“Policies and procedures in order to recommend any necessary changes to structure, processes, procedures and policies to ensure that best practices are established and maintained in all operational functions” Is King’s expecting a review of all policies and procedures? If so, how many are in scope for the organizational review per department?
	Yes. ~ 10 unit.
23	What is the scope of the process review? Are processes to be assessed at a key-stroke and detailed task-by-task level or at a capability/outcome level?
	Capability and outcome level.
24	What is the scope of the systems/technology review? Which systems need to be assessed? Is King’s looking to reduce/consolidate the number of systems to reduce costs and simplify the overall technical architecture?
	The intent of this is to identify what data should be available from these systems and how this data can inform operations, strategy, and governance.
25	Please clarify what is meant by and in scope for “physical infrastructure”. For example, does the vendor need to look at optimizing the cost of real estate and the number of buildings?
	No.
26	Is the vendor expected to develop a Business Case to justify the costs/benefits of recommendations?
	No. King’s may reengage consultant if external support is required to develop a business case to evaluate feasibility of a recommendation.
27	“Identify opportunities to incorporate a continuous improvement mindset and process aimed at ensuring that Kings sustain the transformation by benchmarking and adopting best practice across all areas.” Is benchmarking required as part of the scope for the selected vendor? And if so, are there any specific equivalent organizations that King’s wants to be benchmarked against? Does King’s have contacts within these organizations that can be engaged?
	Yes.
28	Is data readily available for our use? (e.g. organization charts, FTE and average salary across grades, enrolment-related dataset, course margins, tuition fees, current and past strategies and policies)
	Yes.
29	Will there be any challenges or limitations in providing access to necessary data or systems for our review when the project begins?
	King’s will provide access to requested data as governed by our policies.

30	<p>What current state data (i.e., processing volumes, salary data) and documents (i.e., process maps, RACIs, job descriptions, organizational charts) can be provided at the onset of the project? What is the existing data's level of detail, quality, and currency?</p>
	<p>It is expected the data mentioned can be provided where confidentiality and privacy are required anonymized or in the aggregate.</p>
31	<p>Does King's have any measurable outcomes and targets associated with its objective?</p> <p>Are saving costs an objective? If so what type of costs and by how much? Is King's looking to reduce costs by headcount reduction, FTE reallocation, etc. Is King's looking for an organizational restructuring of teams and functions i.e., consolidation, outsourcing, etc.?</p> <p>We can see that increasing revenue is an objective per 'Revenue Generation Opportunities' in the RFP. Please clarify the functions connected to this objective. Is the vendor only assessing student admissions and enrolment? Or will the vendor also need to: Conduct a market assessment for prospective students? Assess processes for alternative streams of revenue, i.e. research grants, donations, corporate partnerships, facility lease/rentals to 3rd parties, etc.</p> <p>Is increasing service delivery an objective? If so, what are the different services that require improvement and by how much? No.</p> <p>Is increasing the quality of service an objective? If so, what are the different services that require improved quality and by how much? Based upon recommendations.</p> <p>Can you please share the baseline numbers for the above metrics as well as any targets?</p>
	<p>The board has identified cost savings and efficiencies as a potential outcome of this review. The scope of these savings and efficiencies has not been yet been defined. Recommendations on FTE reallocation within administrative units in an effort to optimize efforts to achieve our strategic plan would be welcome. Ancillary Services, Enrolment, and alternative streams of revenue would be the focus of the objective to increase revenue opportunities. Increasing service delivery and quality of service are not objectives of this plan but could be explored as necessary as part of the review.</p>