

Fathers of Confederation Buildings Trust
Employee Benefits Consulting Services
Request for Proposal
October 2024



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1.0 Introduction

Fathers of Confederation Buildings Trust (operating as Confederation Centre of the Arts) is requesting proposals from professional insurance brokers to provide ongoing consulting services with expertise in employee benefits plans, group insurance and employer support. This Request for Proposal contains background information on Confederation Centre of the Arts (CCOA) and provides specific information that must be included in the proposals submitted. Proposals must be submitted no later than **Friday November 15, 2024 at 12:00pm**.

2.0 Background

The Fathers of Confederation Buildings Trust was incorporated by a special act of the Prince Edward Island Legislature in 1964 as Canada's national memorial to the Fathers of Confederation with the mandate to inspire Canadians through heritage and the arts while celebrating the origins and evolution of Canada as a nation. Operating as Confederation Centre of the Arts (CCOA), it consists of a significant art gallery and permanent collection; an 1100-seat class A theatre, and 220-seat cabaret theatre, an outdoor amphitheatre, and several arts education and heritage programs and facilities.

3.0 Scope of Service

Confederation Centre of the Arts is seeking professional consulting services and expertise in employee benefits to assist in going to market for a group insurance provider for its group insurance benefits plan and providing ongoing consulting services to its existing plan.

This is not a request for insurance quotations. Insurance brokers must not contact insurance companies or markets for quotations at this time. Any attempt to restrict market availability at this time will be grounds for elimination from consideration of this request for proposals.

At present there are approximately 75 active and retired employees enrolled in the group insurance plan.

The benefit plan consists of:

- Basic life insurance
- Voluntary optional life insurance
- Dependent life insurance
- Accidental death and dismemberment insurance
- Voluntary accidental death and dismemberment insurance
- Long term disability income benefits
- Extended health care benefits including world-wide travel
- Dental care.

The successful proponent will provide general consulting services to:

- Support the issuing of insurer / carrier RFPs by providing a peer review of identified group insurance specifications and the methodology used for presentation of the requirements.
- Assist in reviewing and analyzing RFP submissions and providing recommendations on final selection.
- Provide updates on market trends and innovative ideas that could affect the employee benefits plan and the selection of a group insurance provider.
- Provide expertise on design issues relative to Confederation Centre of the Arts' benefits plan.
- Provide ongoing consulting services, including any implementation issues in a change in providers results.

4.0 Proposal Requirements

The following items should be specifically addressed in the proposal:

1. General Information

- a) Name of insurance brokerage company
- b) Contact person
- c) Mailing address
- d) Telephone number
- e) E-mail

2. Understanding the organization

Provide a summary demonstrating understanding of CCOA's requirements as well as other added value services that can be provided given the CCOA's environment.

3. Proposed Approach / Process

- a) Describe your organization's proposed approach to implementation, describing how your organization will meet the service requirements outlined in section 3.
- b) Describe how your organization completes assessments of the current market and how your organization establishes favourable rates for their clients.
- c) Describe the process your organization completes in order to provide CCOA with an insurance company that best meets its needs.

4. Demonstrated Experience and Proponent's References

- a) Provide a description of your organization's relevant skills and experience. Please emphasize experience with similar size/type of requirements and environments as CCOA, including not-for-profit organizations.
- b) Provide evidence that your organization is appropriately licensed and in good standing to operate as an insurance broker in the province of Prince Edward Island.
- c) Provide three (3) client references for work done in the past three (3) years. CCOA may contact any or all references supplied by proponents to verify and validate any information submitted.

5. Proposed Team and Resources

The successful proponent will be required to provide a team to ensure the provision of the services in accordance with the requirements of this RFP. Please identify personnel who will be assigned to the file and provide each team member's relevant qualifications and experience.

6. Pricing

Please provide your proposed pricing structure, including commission rates, if applicable.

5.0 Timeframe

a) Formal release of the RFP	October 21, 2024
b) Last day to submit questions or comments re RFP (12 pm)	October 28, 2024
c) Proposals due to CCOA by 12 pm	November 15, 2024
d) Anticipated award date	November 29, 2024

6.0 Evaluation Criteria

The Confederation Centre's decision to select a candidate will be based on, but not limited to, the following priorities:

- (a) Broker's relevant experience;
- (b) Demonstrated commitment to customer service;
- (c) Pricing;
- (d) Overall quality of the proposal and demonstrated understanding of Confederation Centre's requirements.

Responses to this proposal are requested to be received, either electronically, or in person at our administrative offices, now located at BDC Place, 119 Kent Street, 6th floor, by no later than 12:00 pm on November 15, 2024. If providing copies in person we ask that you include three copies (including one unbound) of the proposal. We will evaluate proposals and may request additional information if needed.

7.0 Contact Information

All inquiries should be directed to:

John Mooy, Director, Human Resources – (902) 628-6123 or email jmooy@confederationcentre.com

In-person submissions to:

Confederation Centre of the Arts
Administrative Offices
119 Kent Street, 6th Floor
Charlottetown, PEI

Attn: John Mooy, CPHR
Director, Human Resources

Or electronically to: jmooy@confederationcentre.com

APPENDIX A – Additional Information

List of additional information:

- Current Policies, limits and renewal dates
- Statement of values

This RFP is intended to procure Insurance Broker Services to CCOA. Additional information (listed above) is available. To receive the content of Appendix A, please email jmooy@confederationcentre.com with the following:

- **Document proving that the proponent is Licensed in The Province of Prince Edward Island**
- **Document proving that the proponent has a minimum of five (5) years in business as a firm in Canada providing brokerage services.**
- **Evidence of Insurance Brokers Errors and Omissions insurance.**