

# REQUEST FOR PROPOSAL: BENEFITS BROKER SERVICES

**RFP Issued:** August 15, 2024

## OVERVIEW AND BACKGROUND

viaSport BC Society (viaSport) is an independent not-for-profit organization and a legacy of the Vancouver 2010 Olympics and Paralympic Games operating as the provincial government's lead agency responsible for promoting and developing amateur sport in British Columbia.

We believe that one of the secrets to our success is the outstanding people we hire. We are a small team of 19 permanent employees (18.2 full-time equivalents). Our compensation philosophy is to offer compensation packages that are competitive, meet the needs of our employees and are sustainable.

### Compensation Philosophy

viaSport offers compensation packages that are competitive, meet the needs of our employees, and are sustainable



Comp Packages  
Salaries  
Benefits  
Work environment  
Professional development

Sustainability  
Maintaining our staff complement year-over-year

Attract & retain staff  
Non-profit sector peers

viaSport's employee benefits plan was established by a broker who has managed our account for the past 10 years. The dental, extended health, ASI and life insurance benefits are administered by GroupHEALTH Global Benefit Systems Inc. with offerings under the Community Services Benefits Trust. Our staff benefits plan costs have been rising steadily. The total annual budgeted payroll is \$1.66 million. The total annual cost of our health benefits plan is \$146,700 and we have determined that the plan is no longer sustainable.

Over the last few years viaSport has made conscious efforts to implement workplace and compensation adjustments to enhance our employees' well-being. We've transitioned to a hybrid work environment to offer greater flexibility and work-life balance. Our ongoing investment in company culture and professional development reflects our commitment to engaging and retaining our team. As a small non-profit without a dedicated human resources department, we seek to partner with a benefits broker who can provide expert advice and guidance to support our staff.

## PURPOSE OF RFP

viaSport is looking to partner with an experienced employee benefits broker who can guide us through the process of market evaluation, obtaining competitive quotes, and selecting a benefits plan that aligns with our compensation philosophy. The selected

broker will also provide ongoing support to ensure the plan's effectiveness, benchmark its competitiveness against industry peers, and assess its sustainability over the long term.

### SCOPE OF SERVICES

The selected brokerage firm will perform the following services:

- Evaluate / benchmark viaSport's existing health benefits plan against market peers.
- Recommend plan design changes that increase health benefits value to employees while considering organizational cost pressures.
- Go to market - seek and negotiate quotes from benefits insurance providers.
- Provide recommendations regarding selection of benefits insurance provider.
- Assist with benefits plan implementation and staff communications regarding employee health benefits.
- Perform annual benefits plan review, provide plan change recommendations, implement renewals.

### REQUEST FOR PROPOSAL

Please provide the following information in your Request for Proposal (RFP) submission:

Criteria	Information details
Fit of firm to viaSport's needs	Details of your firm: <ul style="list-style-type: none"> <li>• Incorporation date, firm's size (number of staff), organization and structure as it is relevant to this RFP.</li> <li>• A statement summarizing the benefits to viaSport for selecting your firm.</li> <li>• Industry experience and client base.</li> <li>• Knowledge and understanding of the benefits landscape for non-profits. Understanding of viaSport's broader business needs and risks.</li> <li>• The approach the firm will use in servicing the account including:               <ul style="list-style-type: none"> <li>○ Business practices and considerations when taking viaSport's benefits plan to market.</li> <li>○ General account management and interactions of the account manager with the client.</li> <li>○ The high-level process for the annual employee benefits plan renewal.</li> </ul> </li> </ul>
Level of service and responsiveness	Description of your: <ul style="list-style-type: none"> <li>• Internal processes (include use of tools / data / technology) for: reviewing plan usage, benchmarking plans against market, and delivering services which are responsive and aligned to client-specific needs</li> <li>• Availability for questions by client and general response time</li> <li>• Succession planning and steps to ensure staff continuity - account manager turnover</li> </ul>
Capabilities and experience	Provide: <ul style="list-style-type: none"> <li>• Names, qualifications (e.g. education/certifications, position in firm, years and types of experience, and continuing professional development) and location of partners, manager and any service team member(s) who would be assigned to our account.</li> </ul>

	<ul style="list-style-type: none"> <li>• Experience with organizations of similar nature and size, served within last 3 years; may provide an additional client list to support description</li> <li>• Service on non-profit or charity Boards, industry awards, advisory boards</li> </ul>
Costs and value of services	Please describe your plan pricing strategy, commission philosophy and structure. Outline other value-add supports your firm provides e.g. newsletters, webinars, thought-leadership on emerging issues, employee benefits trends, etc.

**PROPOSAL EVALUATION**

viaSport's Director of Finance, COO and appropriate staff will review proposals and make recommendations to the CEO for final approval. The COO and/or CEO may request a meeting with some qualified potential firms prior to final selection. Proposals will be reviewed in accordance with the following criteria:

1. Proposed approach to scope of services, and meeting the requirements of this RFP.
2. Level of experience of the individual(s) identified who will be servicing the account.
3. The firm's experience with similar clients.
4. Value for Services.
5. Interviews, if conducted.

All proposals must follow the required format, being:

- Electronic submission.
- Page Limit: eight (8) single-sided, including cover page.
- Page Size: 8 ½ x 11; portrait.
- Font Size: 12. Double-spaced.
- Margins: 1" minimum on the top, bottom, and sides of all pages.
- All pages must be numbered; double-sided printing is acceptable.
- Do not use material in proposals dependent on color distinctions, animations, etc.
- Do not include attachments other than those requested or required by this RFP.

Failure to follow the required format may result in disqualification of a proposal.

viaSport reserves the right, at their sole discretion without explanation to the prospective firm, at any time choose to discontinue this RFP without obligation to any prospective firm.

**TIMELINES**

- RFP submissions are due by September 6, 2024 5pm by email to [lianas@viasport.ca](mailto:lianas@viasport.ca)
- Submission review, and virtual meetings will occur until September 14, 2024
- References and firm selection will occur by September 20, 2024

**CONTACT AND PROPOSAL SUBMISSION**

You may contact viaSport's Director of Finance, Liana Schou, if you require clarifications or have questions. Email: [lianas@viasport.ca](mailto:lianas@viasport.ca). Submission deadline: September 6, 2024.

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