

# The Chamber of Commerce Executives of Canada (CCEC) Request for Proposal

## REQUEST FOR PROPOSALS FOR BENCHMARKING & COMPENSATION STUDY

**December 17, 2018**

Proposals Due: February 8, 2019, 4:00 PM

*Request for Proposal*

*Benchmarking and Compensation Study*

### SECTION 1 – SUBMITTAL PROCEDURES & DEADLINE

#### 1.0 OBJECTIVE

The Chamber of Commerce Executives of Canada (CCEC) are seeking proposals from qualified firms for consulting services to conduct a Chamber wide Benchmarking & Compensation Study (BSC).

### SECTION 2 – PROPOSAL REQUIREMENTS

#### 2.0 PROPOSAL SUBMITTAL

(1) electronic version (USB flash drive) must be received no later than 4:00 PM on, **February 8, 2019**.

Please submit your e-proposal in labeled “**RFP Response for Benchmarking & Compensation Study**”

Proposals must be mailed or delivered to:

Sent via email: [shelley.morris@mymts.net](mailto:shelley.morris@mymts.net)

Proposals received after the submittal deadline stated above will not be considered. Once received, the proposal and supplementary documents become the property of the CCEC.

#### 2.1 INQUIRIES

For all questions and inquiries related to this Request for Proposals (RFP), please contact:

Shelley Morris

[shelley.morris@mymts.net](mailto:shelley.morris@mymts.net)

204.925.8000

#### 2.2 TENTATIVE SCHEDULE

Provided below is the tentative schedule for the RFP process. Note that the schedule is tentative and that aside from the RFP release date and due date, the schedule may be subject to change.

#### Timeline

RFP Release Date	January 7, 2019
RFP Submission Deadline	February 8, 2019 at 4:00 PM
Interviews for Selected Finalists	March 2019
Contract Preparation/Negotiations	End of March 2019
Survey to the Membership	Mid May 2019
Data Collection Due Date	June 2019
Report and Findings to the CCEC Board	July 26, 2019

## **SECTION 3 – BACKGROUND**

### **3.0 ABOUT THE CHAMBER OF COMMERCE EXECUTIVES OF CANADA (CCEC)**

The Chamber of Commerce Executives of Canada (CCEC) is the one and only organization dedicated to serving the interests of executives involved in the management of Chambers of Commerce and Boards of Trade across Canada.

Since 1967, CCEC has been the organization that connects Chamber executives from Victoria BC to St. John's NF, from Yellowknife NT to Windsor ON (and more than 150 member Chambers/Boards in between those points!) Our mission is to enhance your effectiveness!

<http://www.ccec.biz/>

## **SECTION 4 – SCOPE OF SERVICES**

### **4.0 OVERVIEW**

The Scope of Services, as may be modified through negotiation and/or by written addendum issued by the CCEC, will be made a part of the Agreement. The Scope of Services is expected to be completed within 5 months. The scope of services for the Benchmarking and Compensation Study includes the following essential tasks:

The CCEC is looking for an interactive product that can pull real time data from users through an online portal.

#### **Financial Profile**

- Total Annual Chamber Revenue
- Total Annual Chamber Expenses
- Total Annual Chamber Wage Expenses
- Total Annual Chamber Benefit Expenses

#### **Member Profile**

- Member Dues Revenue (Dollar Value of Member Accounts)
- Number of Member Accounts
- Organizational Function (Maybe under Non-Dues Revenue)
- Other – Municipal or Contract Work. Provincial Contracts, such as a labour study

#### **Chamber Profile**

- Total Chamber Staff Size (includes Chamber, VIC and ED FTEs)
- Chamber Population / Service Area
- Chamber Service Area Type
- Number of Businesses in Service Area
- Province
- Chamber Merger with another Organization
- Loss of Chamber Function to another Organization
- Chamber Accreditation

#### **Financial – Assets, Liabilities & Reserves**

- Current Chamber Assets
- Total Chamber Assets
- Current Chamber Liabilities
- Total Chamber Liabilities
- Chamber Reserves as a Percentage of Annual Expense

## **Financial – Revenue**

- Membership
- Events (AGM, awards, breakfast and luncheon events, golf tourneys, trade shows etc)
- Insurance
- Sales of Products & Services (advertising, signs, publications, reports, office rental, training programs/seminars etc)
- Grants / Contracts / Fee for Service Funding (e.g. tourism/visitor information, economic development)
- Sponsorship
- Other

## **Total Revenue Calculation**

- Total Non-Dues Revenue (unrestricted and restricted)
- Total Chamber Dues
- Total Annual Chamber Revenue

## **Chamber Fundraising**

- Fundraising Campaign Activities
- If you selected "other" fundraising campaign activities, describe the activities. If not, enter n/a
- Total Fundraising Revenue

## **Chamber Expenses**

- Wage/Benefit Expenses
- Events Expense
- Occupancy Expense
- Membership Retention and Recruitment Expense
- Other

## **Chamber Board – Board Members**

- Voting Board of Director members
- Life, Emeritus and Ex-officio members
- Non-Voting Appointments
- Elected Officials
- Board Terms
- How is your Chamber Registered, BOT Part 1 or 2, Societies Act
- Executive Committee Members

## **Chamber Board – Board Meetings**

- Board of Directors meetings held annually
- Executive Committee meetings held annually

## **Chamber Members – Membership Statistics**

- Number of Member Accounts - Fiscal Year Indicated Above
- Dollar Value of Member Accounts - Fiscal Year Indicated Above
- Cancelled Member Accounts - Fiscal Year Indicated Above
- Cancelled Member Account Value - Fiscal Year Indicated Above
- New Member Accounts - Fiscal Year Indicated Above
- New Member Account Value - Fiscal Year Indicated Above

## **Member Accounts – Number and Value (Prior Fiscal Year)**

- Number of Member Accounts - Prior Fiscal Year
- Dollar Value of Member Accounts - Prior Fiscal Year

- Cancelled Member Accounts - Prior Fiscal Year
- Cancelled Member Account Value - Prior Fiscal Year
- New Member Accounts - Prior Fiscal Year
- New Member Account Value - Prior Fiscal Year
- New Member Accounts in Prior Fiscal Year that Renewed in Fiscal Year Indicated Above.
- Cancelled Memberships from Business Closings

#### **Chamber Members – Membership Dues**

- Chamber has Tiered Dues Structure
- Number of Years Tiered Dues Structure in Place
- Tiered Dues Structure - Membership Impact
- Tiered Dues Structure - Revenue Impact
- For Tiered Dues - Number of Dues Levels
- Minimum Dues Investment Level
- Maximum Dues Investment Level

#### **Chamber Members – Member Demographics**

- Chamber Members with 1-5 Employees
- Chamber Members with 6-20 Employees
- Chamber Members with 21-50 Employees
- Chamber Members with 51-100 Employees
- Chamber Members with 100+ Employees
- Total - Members by Staff Size

#### **Chamber Member – Total Employees**

- Chamber Members Total Employees

#### **Staffing and Benefits – Staffing Statistics**

- Total Chamber Staff Size (includes Chamber, VIC and ED FTEs)
- Chamber Organization’s Outsourcing
  - Administration/Operations
  - Communications/Marketing
  - Economic Development
  - Economic Inclusion/Diversity
  - Entrepreneurial Development
  - Events/Programs
  - Finance/Accounting
  - Fundraising
  - Global Trade/International Business
  - Government Relations/Public Policy
  - Human Resources
  - Information Technology/Web Support
  - Membership
  - Small Business Development
  - Tourism/CVB
  - Workforce/Education
  - Other
  - None
- Chamber organization’s Employee Turnover
- Chamber organization’s Employee Tenure

## Staffing and Benefits - Employee Benefits

- Average Annual Salary Increase
- Employer Offered Benefit Plans
- Maximum Employer Retirement Contribution
- Fringe Benefits Offered

## CCEC Compensation Study

- Total Number of Members
- Total Number of Employees (FTE's)
- Total Annual Payroll
- Total Annual Operating Budget
- Standard Hours Worked per Week
- Population of Communities Served (Trading Area)
- Province
- Salary Report Overview
  - Accountant/Bookkeeper Junior
  - Accountant/Bookkeeper – Senior
  - Receptionist/Administrative Assistant
  - Executive Assistant
  - Office Manager/Coordinator
  - Administrative Coordinator/Assistant
  - Controller/Finance Director
  - Top Position/ (President, CEO, Executive Director, or General Manager)
  - Membership Services Director/Manager
  - Membership Services Coordinator
  - Public Relations / Communications Officer
  - Event Manager / Coordinator
  - Marketing Director / Manager
  - Business Development Manager / Sales Manager
  - Information Technology Administrator (any IT related position)
  - Policy/Research Analyst
  - Marketing/Communications Coordinator
  - Government Relations Director / Economist
  - Visitor Information Centre Manager / Coordinator

## Benefits & Workplace Practices

### Health Benefits

1. Does your Chamber participate in the Chamber of Commerce Group Benefits Plan?
2. On average, what percentages of benefit premiums (health & dental) are paid for by your Chamber?
3. If your Chamber provides a flat dollar amount for benefits to each employee from which they can select their choice of benefits, please indicate the total dollar value of the benefit package.
4. Select the benefits that are provided to each of the employee groups in your Chamber.
5. How many paid sick days are provided per year for casual illness (if applicable)?

### Retirement Savings Plan

1. a) Are retirement savings plan provided through the organization?  
b) If yes, what type of retirement savings vehicles offered?  
c) If yes, what percentage of base pay does your Chamber contribute to the employees' retirement savings?  
d) What is the maximum dollar value your Chamber contributes to the employees' retirement savings?

## **Work Arrangements**

1. How many hours are in the standard work week for full-time employees?
2. How many hours per week, on average, does the Top Position in your Chamber work?

## **Vacation & General Holidays**

1. How many weeks of paid vacation are provided at a time of hire?
2. What is the maximum number of weeks paid vacation available?
3. Are more General Holidays provided than what is required under statutory regulations?

## **Other Leaves of Absences**

1. Select from the available list which of the paid leaves of absences the organization provides.

## **Perquisites and Other Workplace Practices**

1. Select all perquisites and practices provided by your organization for each employee category.
2. Are salary increases linked directly to an individual's performance?

## **4.1 TERM OF THE AGREEMENT**

The agreement for services shall be for the term of one (1) year, commencing from the date the agreement is approved by the CCEC, subject to certain conditions. Any comments on or objections to this template agreement must be noted in your proposal.

## **SECTION 5 – PROPOSAL CONTENT**

### **5.0 DATA TO BE SUBMITTED WITH PROPOSALS**

In order to be considered for selection, each proposing firm shall submit a proposal which includes the following:

1. A brief cover letter summarizing key points of the proposal. It must be signed by an individual with authority to bind the proposer and should state that all conditions contained in the attached proposal are valid for a period of at least 90 days.
2. The firm shall state why it believes it is qualified to provide the services described in this Request for Proposal. Provide a summary of your firm's qualifications, including background and experience. Please indicate your firm's experience in undertaking similar projects and the experience of the team proposed for this project.
3. The number of years the firm has been in business.
4. Provide a list of at least three (3) references with name of organization, job title, addresses and phone numbers. References should be for cities or other public agencies for which the firm is currently providing similar services or has provided a benchmarking and compensation study in the last five years.

### **5.1 FORM**

Proposals and materials shall be submitted for evaluation. Legibility, clarity and completeness are essential. Proposals shall provide assurance that the firm has the professional capacity to satisfactorily complete all tasks as described in Section 3 of this RFP. Each firm shall also provide a statement that the firm agrees to provide proof of insurance as required.

### **5.2 OBJECTIVITY**

Services are to be objective and unbiased. Proposals shall certify that the firm has the capacity to provide objective and unbiased services.

### **5.3 ACCEPTANCE OF PROPOSAL CONTENT**

If a contract is awarded as a result of a response to this request, the CCEC will select the successful firm as quickly as possible after the final date for receipt of the proposals and completion of the interview and selection process. *It is likely that the content of the proposal of the successful proposer will be used in a legal contract of agreement. Proposers should be aware that methods and procedures proposed could become contractual obligations.*

## **SECTION 6 – EVALUATION PROCESS**

The CCEC will conduct a two-tiered evaluation process to select the ideal firm. The initial evaluation will consist of a review of all timely submitted proposals with a focus on qualifications, proposed methodologies, and consideration of cost estimates. Following the initial evaluation, the pool of candidates will be reduced to a short list of no more than the top three (3) to five (5) firms. The secondary evaluation will consist of interviews and reference checks for each of the short list candidates. The weighted criteria for each level are:

**6.0 Initial Evaluation: The following criteria (as weighted) will be used to evaluate all timely submitted proposals.**

### **1. Qualifications and Relevant Experience (40 points)**

- Years in business and qualifications of individuals and team
- Experience providing similar services for other businesses or agencies

### **2. Thoroughness and Organization of Proposal (25 points)**

- Includes all elements of the proposal
- The proposal is organized, concise and thorough
- Demonstrates understanding of the scope of work
- Consultant's approach to accomplishing the scope of work

### **3. Methods and Procedures (20 points)**

- Demonstrated ability to provide qualified and experienced personnel
- Availability of lead and all proposed team members
- Consultant's general approach to providing services
- Description of procedures and methods for services
- Demonstrated ability to deliver services in a timely manner
- Description of the final presentation format for benchmark results and platform used for end user delivery

### **4. Cost Estimates (15 points)**

- Costs for providing the proposed scope of services
- Quality of work to be delivered based on consultant's fee

**6.1 Secondary Evaluation: The following criteria will be used to evaluate the short list of selected consultants:**

### **1. Qualifications and Relevant Experience (40 points)**

- Demonstrated qualifications of individuals and the team
- Experience providing similar services for other businesses or agencies
- Demonstrated understanding of the scope of work

### **2. Preparedness and Understanding of the Project (40 points)**

- Demonstrated ability to provide sufficient qualified and experienced personnel, including supplemental personnel
- Demonstrated availability of lead and all proposed team members
- Consultant's general approach to providing services
- Communication skills

### **3. Reference Checks (20 points)**

- Customer satisfaction
- Cost versus product level of service
- Communication strengths and analytical skills
- Other

## **SECTION 7 – ADDITIONAL PROPOSAL INFORMATION**

### **7.0 LEGAL RESPONSIBILITIES**

The consultant shall keep itself informed of all local, provincial, and federal laws and regulations, including but not limited to those pertaining to conflicts of interest, which in any manner affect those employed by it or in any way affect the performance of its duties under the scope of work. The consultant shall at all times observe and comply with all such laws and regulations.

### **7.1 COSTS FOR PROPOSAL PREPARATION**

The CCEC shall not be responsible for any costs incurred by any firm for the preparation of any proposals, including interviews. No obligation, either expressed or implied, exists on the part of the CCEC to make an award or to pay any costs incurred in the preparation or submission of a response. All costs associated with the preparation or submission of a proposal are solely the responsibility of the candidate.

### **7.2 RESERVATION OF RIGHTS TO REJECT, WAIVE, AND REISSUE**

The CCEC reserves the right to reject any and all submittals, waive any irregularities, reissue all or part of this Request for Proposals, and not award any contract, all at its discretion and without penalty. The CCEC also reserves the right to accept a proposal and enter into an agreement as a result of the initial proposals received, or alternatively, it may elect to negotiate requested modifications to the Contract Services Agreement included herein as Exhibit A, conduct interviews or request presentations from proposers who are within an acceptable competitive range, as determined by the CCEC. All submittals will become the property of the CCEC. The CCEC reserves the right to make use of any information or ideas in the responses. All proposals will be maintained as confidential working papers until officially presented to the CCEC Membership.

### **7.3 LIABILITY INSURANCE REQUIREMENTS FOR CONSULTANTS**

As a condition of awarding a contract, the firm will be required to have general liability insurance at a minimum of two million dollars (\$2,000,000) per occurrence and two million dollars (\$2,000,000) aggregate, professional liability insurance at a minimum of two million dollars (\$2,000,000) per occurrence, worker's compensation at province-mandated minimums, no less than two million dollars (\$2,000,000), and vehicle coverage including comprehensive and collision insurance at a minimum of two million dollars (\$2,000,000). The consultant must name the CCEC and its Committee, and Members as additional insureds. The proposal shall state whether such insurances are currently in force or will be at the time of contract execution.

## **8.0 Project Budget**

The scope of this project is currently budgeted for \$7,500, but can be reviewed based on the scope being offered.

### **8.1 Sponsorship Opportunities**

Sponsorship opportunities for advertising nationally through the CCEC could be considered for in-kind or contra service arrangements in exchange for the value of the services or a portion of services offered in kind.