

**REQUEST FOR INFORMATION (“RFI”)  
For Contracted Service Provider  
RIMS Canada Council Program Coordinator**

**June 20, 2019**

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## **RFI for RIMS Canada Council Program Coordinator**

The RCC Program Coordinator Task Force (“RPCTF”) is issuing a Request for Information (“RFI”) that will support a needs assessment and recommendations to the RIMS Canada Council (“RCC”), a standing committee of the Risk & Insurance Management Society (“RIMS”). Further information on RIMS Canada can be found on the website <https://rimscanada.ca>.

**This process seeks to qualify and determine contractor interest, deliverables and costs that would be associated for this new vendor role.**

### **Section 1 – RFI DOCUMENTS & INQUIRIES**

This RFI does not obligate or commit the RCC or RIMS to any purchase or agreement. The RCC or RIMS is not responsible for any direct or indirect costs incurred in the preparation, submission or presentation in responding to this RFI. All documentation submitted shall become the property of the RCC. The RPCTF may at its sole and unfettered discretion, reject any submission that may be considered illegible, informal, in complete and or does not contain sufficient information for the RPCTF to evaluate and use the information that will provide a recommendation to the RCC for this role.

The RPCTF, the RCC and RIMS may reject a submission where they may be an unresolved dispute or has a claim, judgment or ongoing litigation.

The RPCTF may at its discretion make recommendation to the RCC to conduct a formal RFP based on the information gathered in this RFI process or may use this RFI to directly negotiate with individual proponents who have directly responded to this RFI.

### **Section 2 – RCC OVERVIEW**

The RCC addresses the interests of Canadian RIMS members and their chapters in support of RIMS mission. Each of the ten Canadian RIMS chapters elects a board member to be their representative to the RCC. Local chapters include; British Columbia, Northern Alberta (Edmonton), Southern Alberta (Calgary), Canadian Capital, Manitoba, Maritimes, Newfoundland and Labrador, Ontario, Quebec and Saskatchewan.

### **Section 3 – RCC PROGRAM COORDINATOR DESCRIPTION**

The Program Coordinator works closely with the RCC, a volunteer driven and operated council, that addresses the interests of Canadian RIMS members and their chapters by connecting Canadian chapters to education and shared resources. The program coordinator is an ancillary/auxiliary resource to the local chapters providing administrative support to the RCC, its subcommittees, volunteers and local risk chapters by connecting chapters to Canadian content and reputable speakers with direct knowledge of the Canadian market.

The services provided by this role are intended to alleviate volunteer fatigue, create sustainability, enhance program quality and increase the chapter’s profile in the Canadian landscape. This is not to be confused as a replacement for the RIMS Professional Exchange of Risk Knowledge (“PERK”) program.

## **Key Responsibilities:**

The Program Coordinator will support ten Canadian RIMS chapters by collaborating with its executive group to procure, develop and deliver educational programming. This role requires passion for the risk and insurance industry as well as a customer focus to create best in class programming which supports current and emerging areas of risk. The program coordinator will;

- Identify and make contact with subject matter experts for Canadian chapter content and education, facilitate in-person programming, liaise with third parties and oversee logistics for session speakers.
- Assist in marketing chapter events via email, trade event listings (such as Canadian Underwriter) and social media platforms (such as Twitter, Instagram, LinkedIn and Facebook) and ensure any meeting materials/presentations are secured prior to the event and added to each chapter website upon conclusion of meeting.

## **Knowledge and Skills**

- Manage programming and identify opportunities to enhance the effectiveness of existing programs;
- Manage and prioritize multiple projects and align resources to ensure that deadlines and priorities are met engaging volunteers for on the ground support;
- Collaborate with other insurance and risk partners (e.g., Insurance Institute, DRIE, Brokers, Risk Management) and other community partners (safety associations, universities and colleges) in the development and delivery of chapter programming;
- Develop and maintain training records and data base of historical, current and emerging risk topics garnered from your relationship with external vendors, organizational contacts, industry partners and industry association contacts;
- Develop and maintain a data base of speakers and facilitators (past, present, potential) garnered from your relationship with external vendors, organizational contacts, industry partners and industry association contacts;
- Ensures programs reflect diversity, and encourages different perspectives;
- Perform other duties as assigned within the scope of this position.

## **The successful vendor will demonstrate:**

- The ability to build and sustain constructive, friendly, professional relationships and networks of key contacts, partnerships that can provide information, assistance and support;
- Strong written and verbal communication skills, presentation, facilitation and analytical skills;
- Strong proficiency with experience in MS Office, including Outlook, Word, Excel and Power Point required;
- Excellent project management and organizational skills and attention to detail;
- The ability to work independently as well as in a team environment;

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- The ability to multi-task and demonstrate flexibility to effectively prioritize and ensure completion of assigned work;
  - Sound technical background and an interest in developing technical skills through both internal and external training;
  - Sound judgment in consideration of financial resources within chapter's budget.

### **Qualifications and Education:**

- Social media literacy to access and post to social media platforms;
- Direct experience in the Canadian marketplace;
- Minimum 3 - 5 years of risk management, insurance industry, marketing, customer service or administrative experience or an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job;
- Although preference may be given to those with a degree or diploma in Risk Management and/or Insurance (CRM, CIP, FCIP), other relevant educational experience that will be considered may include adult learning and development, project management, and/or other relevant experience.

### **Section 4 – RFI SUBMISSION INSTRUCTIONS**

- Notice of intent and electronic submissions to the RFI are to be submitted to: RCC Program Coordinator Task Force ("RPCTF"), c/o [madrew66@gmail.com](mailto:madrew66@gmail.com), Project Task Force lead. No printed submissions are required for response to this RFI.
- All qualified and interested parties should email their intent to respond to this RFI to the RCPT no later than 4:00pm Eastern Standard Time, June 28, 2019. Full contact information including name, address, phone number and email should be included.
- Questions or requests for clarification should be submitted via email to the RCPT no later than 4:00pm Eastern Standard Time, June 28, 2019.
- All responses to questions and any updates to this RFI will be communicated by the RCPTF directly to vendors who have expressed their intent to respond. The RCPTF may respond to any request by verbal or written clarification. No clarification provided with be binding.
- All submissions are to be signed and provided in pdf format.
- The RFI response must be submitted in English.
- Responses to Section 4 of this RFI are due no later than 4:00pm Eastern Standard Time, Wednesday, July 10, 2019.

### **Section 5 – SUBMISSION FORMAT REQUIREMENTS**

Your "electronic" response must include the following components:

- Cover Letter to the RCPTF;
- Overview of your company or past experience as an independent contractor including a detailed resume of professional experience for the individual who will be providing the service under the agreement;

- Response to questions included in Section 6 of this RFI

## Section 6 – RFI Questions

We are seeking information to determine qualification, deliverables expected and annual cost of this service.

1. Provide a brief history and description of your firm, including general information regarding size, capabilities and areas of specialization. If you are an independent contractor, please provide an overview of your contracting experience.
2. Describe your clients and summarize your approach to other similar project experience;
3. Describe your experience and involvement with RIMS in Canada including risk management practice and knowledge of risk management in the Canadian Landscape;
4. Describe your practical experience with developing and administering an educational program or similar project activity;
5. The RCPTF needs to determine the scope of work for this role. Based on your knowledge of RIMS, chapter educational requirements and industry expertise please;
  - a. Provide an indication of number of days and hours per month for first year (data base development of session providers, implementation & chapter support, other key activities) and subsequent years (ongoing maintenance & chapter support) expected including hourly rate.
  - b. Indication of total hours per year as well as total expected contract value
6. Describe the key activities, and expected frequency of deliverables the RCPTF should expect as a result of this work;
7. Describe your intended storage and retention practices for any formal documentation, database, correspondence etc;
8. General as well as professional liability insurance will be required. Please confirm that this coverage is in effect and/or will before any agreement is in place. A certificate of insurance can be included as part of this submission as evidence of insurance but will be required prior to execution of an agreement.
9. You may be required to attend the annual RIMS Canada conference in September as well as an RCC meeting in January and/or Chapter meetings as required. Travel costs associated with attending will be paid by the RCC.
  - a. Please confirm that are no foreseen issues with this attendance.
  - b. Please outline what deliverables can be expected from your attendance at meetings and/or industry events.