



## **REQUEST FOR PROPOSALS FOR COMMUNICATION AND PUBLIC RELATIONS SERVICES**

### **OVERVIEW AND CONTEXT**

The Association of Municipal Managers Clerks and Treasurers of Ontario (AMCTO); the City of Toronto Administrative, Professional, Supervisory Association (COTAPSA); the Ontario Association of School Business Officials (OASBO); and the Ontario Municipal Administrators' Association (OMAA) have long advocated to the Ontario Municipal Employees Retirement System (OMERS) for representation on both the Sponsors Corporation (SC) and Administration Corporation (AC) on behalf of the nearly 60,000 active members of management and non-union contributors to OMERS. For a variety of reasons our consortium has been unsuccessful in our efforts to convince the OMERS organizations to reconsider the current board appointment process when the review of their Composition Bylaw was recently completed.

We maintain that it is profoundly unjust that OMERS refuses to consider representation on the SC and AC for our members given that management and non-union employees represent the second largest employee membership group within OMERS, comprising 22% of the active OMERS membership.

Given this situation, the organizations listed above formed a corporate entity named the Association of Non-Union and Management Members of OMERS (ANUMMO). ANUMMO's mandate is to represent the management and non-union active members on all issues associated with OMERS. ANUMMO has maintained cordial and respectful relationships with OMERS SC and AC members.

Membership in ANUMMO is open to every employee of an OMERS employer engaged as a non-union or exempt employee, working in an administrative, professional, management or supervisory capacity; and every employee who is ineligible for membership in a trade union as defined in the Ontario Labour Relations Act.

The objects of ANUMMO are to:

- Seek representation on the Board of Directors on each of the OMERS Administration Corporation and the OMERS Sponsors Corporation;
  - Represent members and present their views to OMERS, other associations and government and regulatory agencies on OMERS governance;
  - Share information for the mutual benefit of ANUMMO members and all OMERS members, employers and retirees;
  - Provide a forum for discussion of all the OMERS pension related issues of our members;
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- Bring a formality to disclosing OMERS decision making to our members and OMERS beneficiaries; and
- Respond to the OMERS Boards on issues relating to their accountability and oversight role.

OMERS is the pension plan for Ontario’s local agencies, boards, commissions and municipal employees. It is funded by member and employer contributions and investment returns. According to OMERS 2016 Annual Report, 220,000 current members and employers contributed \$3.9 billion and almost 150,000 retirees received \$3.6 billion in pension benefits that year.

Current OMERS sponsors with board representation and appointment powers to both the SC and the AC, include:

- City of Toronto (employer)
- Ontario Association of Children's Aid Societies (employer)
- Ontario Catholic School Trustees' Association (employer)
- Ontario Public School Boards Association (employer)
- Police Association of Ontario (employer)
- CUPE Ontario, CUPE 79, CUPE 416 (employer)
- Ontario Association of Police Services Boards (employer)
- Electricity Distributors Association (employer)
- Association of Municipalities of Ontario (employer)
- Ontario Public Service Employees Union (employer)
- Ontario Secondary School Teachers' Federation (employer)
- Association of Retired Professional Fire Fighters (employer)
- Municipal Retirees Organization of Ontario (employer)
- Police Pensioners Association of Ontario (employer)
- Ontario Professional Fire Fighters Association (employer)

ANUMMO believes the members of the management and non-union groups also deserve representation and board appointment powers.

## **SCOPE AND KEY DELIVERABLES**

ANUMMO’s success will lie in a large part in its ability to effectively communicate complex pension governance matters to the entire spectrum of OMERS members, employers and retirees and if necessary the Ontario Government and the media.

The success of the Association is tied directly to the ability to create an online hub for our members and readers where there is meaningful and timely information available regarding OMERS governance.

ANUMMO is therefore seeking a firm or individual with the capability, skills and expertise to provide advice, support and services to develop a comprehensive communications plan for the Association.

A top priority will be the development of a Communications Plan to reiterate the “unjustness” of the current refusal for Board representation for the second largest employee group of active members. This includes promoting the rightness of the ANUMMO representation cause to the Province, the SC and AC Boards and their individual representative organizations, non-union and management members, and other OMERS employers, employees, and stakeholders, as well as, the important governance and disclosure issues underlying this specific goal.

This plan must include Brand and Membership Development Strategies as well as a strategy to continue to advance concerns - flagging the issues identified in the January 25/2013 *Report on OMERS Governance* released by the Ontario Government (undertaken over the course of 2012) by Mr. Tony Dean and to challenge OMERS to demonstrate how it has implemented Dean’s recommendations, particularly for improving communications and engagement with stakeholders as an "organizational priority".

Elements in the Communications Strategy shall include:

- A Membership Growth Strategy (cost efficient, easy to use, web-based tactics to attract and retain ANUMMO members and drive participation);
- A Member Communications Strategy;
- Brand Development;
- An Ontario-specific Media Strategy;
- A Social Media Strategy based on current trends;
- An Inter-governmental Relations Strategy; and
- Stakeholder mapping with interaction and communications strategy - intended for all OMERS members, employers, and government and opposition leaders.

## **REQUEST FOR PROPOSAL (RFP)**

This RFP is an invitation to a select number of firms and/or consultants to provide ANUMMO with a non-binding proposal for the provision of written and oral advice and support regarding ANUMMO’s outreach, membership drive, and stakeholder relations needs.

For purposes of evaluation, bidder’s submissions must demonstrate the following:

- A working understanding of OMERS legislated mandate;
- An understanding of sponsor and stakeholder interests regarding OMERS governance and pension management;
- Experience of the key personnel to be assigned to the project; and
- Experience with strategic advocacy on behalf of large organizations.

Bidders should also submit a fee schedule for each of the deliverables and an outline to achieve deliverables.

Bidders must disclose previous work conducted on behalf of any sponsor organizations noted above and the nature of the work.

The RFP shall include specific cost and timelines for each of the seven (7) segments highlighted including the start and end dates

ANUMMO reserves the right to elect not to procure the services that are the subject of this RFP and makes no guarantee of the value or volume of work to be assigned to the successful bidder.

It is anticipated the term of this assignment will be for a period of three (3) months with the option to extend at ANUMMO's sole discretion.

## EVALUATION

The RFPs will utilize a two (2) envelope process, and will be evaluated in the following manner:

Working knowledge of OMERs legislation and governance	30
Experience on similar projects	20
RFP completeness, clarity & quality	10
RFP content	20
<u>Separate Envelope</u>	
RFP Cost	<u>20</u> *

*\*The lowest bid will receive the full 20 points and higher bids will receive a lower mark based on the percentage of the price differential. For example a bid that is 20% higher than low bid will receive a score of 16*

TOTAL	100
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The top scoring firms will be invited for an interview from which a successful firm will be selected.

Bidders providing a submission in response to this RFP will bear ALL their own costs associated with or incurred in this process. The lowest cost Bid will not necessarily be accepted.

## ENQUIRIES

All communications and inquiries must be addressed and sent to Mike Major, in writing via e-mail: cotapsa@toronto.ca.

All inquiries must be made by October 5<sup>th</sup>, 2017.

Where questions benefit all bidders, ANNUMO will share questions and responses with other bidders.

## **TIMELINES AND SUBMISSION REQUIREMENTS**

RFP Issuance: Sept 22, 2017  
Enquiry Deadline: October 5, 2017  
Deadline for Submissions: Oct 13, 2017 4:00 pm  
Interviews (if required): October 23 to 27, 2017  
Contract Award: October 30, 2017

**Bidders must submit 4 bound copies of their submission to:**

Mike Major, President of COTAPSA  
c/o COTAPSA  
77 Elizabeth St., 3<sup>rd</sup> Floor  
Toronto, ON  
M5G 1P4

**1 electronic copy shall also be provided to Mike Major c/o cotapsa@toronto.ca  
(Subject Line to read ANUMMO RFP)**