

## **Request for Proposal (RFP) for Employee Benefits Brokerage Services**

**Community Living York South**  
101 Edward Avenue  
Richmond Hill ON L4C5E5  
www.communitylivingyorksouth.ca

Date: January 30, 2025

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### **1. Introduction**

Community Living York South is seeking proposals from qualified firms to provide employee benefits brokerage services. This Request for Proposal (RFP) outlines the requirements and expectations for prospective brokers. Our goal is to partner with a broker who can deliver comprehensive, cost-effective, and innovative benefits solutions to support the well-being of our employees.

### **2. Background Information**

Community Living York South (CLYS) is a non-profit charitable corporation supporting people with developmental and intellectual disabilities and their families. CLYS has been providing supports and services in Vaughan, Richmond Hill and Markham for over 70 years. Currently supporting just under 2000 individuals each year, CLYS provides a continuum of services including but not limited to supported group living, intensive support, supported independent living, adult day programs, respite care, educational and work supports and community support programs. The Mission, Vision and Values are below:

**Mission:** Empower people with an intellectual disability to live, learn, work and participate in their community.

**Vision:** Community Living York South believes in a society where everyone belongs.

**Values:** People, Team, Community

Additional information can be found on our website at <https://communitylivingyorksouth.ca/>

Number of current employees:

<b>Full Time (Insured)</b>	148
Part Time	70
Contract	7
Student	1
<b>Total</b>	<b>226</b>

Current benefits program:

	Number of participants
Basic Life	150
Basic & Optional AD&D	149
Health Insurance	144
Dental Care	143
Long-term Disability	144

Objectives for the new benefits program:

- Comprehensive and innovative benefits solutions to CLYS employees.
- Cost-effective solutions and more predictable renewals cost.

### 3. Scope of Services

The selected broker will be responsible for providing the following services:

- Developing short- and long-range employee benefit goals and strategies.
- Advisory services throughout the plan year, responding to questions and concerns as required.
- Reviewing and analyzing claims experience, claim service, and claim administration to ensure maximum benefit to the organizations.
- Reviewing and providing recommendations on the most cost-efficient funding methods for benefit programs.
- Marketing of group plans, including in-depth analysis of proposals and recommendations on insurer(s).
- Annual renewal negotiations and reporting.
- Reporting on local and national benefit trends and providing benchmark survey data to help calibrate program offerings with employee and employer costs compared to similar organizations.
- Monitoring of changes in legislation.
- Recommending innovative ideas and new products, programs and services to ensure a competitive, valued and cost-effective benefits program.
- Advice on proven programs and ideas to manage rising healthcare costs.

### 4. Proposal Requirements

Vendors must include the following information in their proposals:

#### 4.1 Company Information:

- Company name, address, and contact information
- Overview of the organization, including years in business and areas of expertise
- Details of similar projects completed
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#### **4.2 Services and Approach:**

- Description of the proposed benefits program and services offered
- Approach to plan implementation and ongoing management
- Strategies for cost containment and employee engagement
- Value-added services offered

#### **4.3 Team Qualifications:**

- Names and roles of key team members
- Resumes and relevant experience

#### **4.4 Pricing:**

- Detailed cost breakdown, including administrative fees and any additional charges
- Payment terms and conditions

#### **4.5 References:**

- Contact information for at least three clients of similar size and scope. CLYS reserves the right to ask for additional references if required.

### **5. Submission Instructions**

Proposals must be submitted by February 21, 2025, 5:00PM to:

Nancy Kula  
Executive Director  
[nkula@communitylivingyorksouth.ca](mailto:nkula@communitylivingyorksouth.ca)

Include the following in your submission:

- A cover letter signed by an authorized representative
- The completed proposal
- Reference Contact Information
- Any supporting documentation

### **6. Evaluation Criteria**

Proposals will be evaluated based on the following criteria:

- Responsiveness to the RFP requirements
- Experience and qualifications
- Quality and innovation of the proposed benefits program
- References

## **7. Timeline**

The RFP process will follow this schedule:

- RFP release date: Thursday, January 30<sup>th</sup>, 2025
- Deadline for questions: Monday, February 10<sup>th</sup>, 2025, at noon
- Proposal submission deadline: Friday, February 21<sup>st</sup>, at 5PM
- Vendor selection announcement: TBD
- Benefit renewal date: Thursday, May 1<sup>st</sup>, 2025

## **8. Terms and Conditions**

- The signer of the proposal shall have the authority to bind the organization.
- CLYS reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities, and to request resubmission. There is no obligation on the part of CLYS to award the contract to the lowest proposer. CLYS shall be the sole judge of proposals.
- All applicable laws and regulations of the Province of Ontario will apply to any resulting agreement.
- CLYS will not reimburse any proponent for proposal development costs.
- CLYS reserves the following rights:
  - Request that any proponent clarify or make changes to its response.
  - Choose to meet with neither, some or all proponents, to discuss their response.
- If CLYS is unable to negotiate and sign an agreement with the highest evaluated proponent, CLYS shall have the sole right to either commence negotiations with the next highest evaluated proponent or terminate the RFP.

## **9. Confidentiality**

The content of all proposals will be kept confidential throughout the selection process and afterward. Copies of any proposal will not be shared with other respondents.

## **10. Contact Information**

For questions or additional information, please contact:

Elizabeth Katchen  
Executive Assistant  
[ekatchen@communitylivingyorksouth.ca](mailto:ekatchen@communitylivingyorksouth.ca)  
905-884-9110 Ext. 602

Thank you for your interest in partnering with Community Living York South. We look forward to reviewing your proposal.