



REQUEST FOR PROPOSAL

**FOR FRONT-END WEBSITE, VIDEOS, AND BACK-END
WEBSITE SERVICES**

**THE CANADIAN ASSOCIATION OF FINANCIAL
INSTITUTIONS IN INSURANCE**

JUNE 2024

**Canadian Association of Financial Institutions in Insurance
Request for Proposal for Website and Video Services**

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CANADIAN ASSOCIATION OF FINANCIAL INSTITUTIONS IN INSURANCE (CAFII)

REQUEST FOR PROPOSAL FOR WEBSITE AND VIDEO SERVICES

EXECUTIVE SUMMARY

The Canadian Association of Financial Institutions in Insurance (CAFII) is currently seeking proposals for website support services. We are seeking bids from suppliers around services we require for our front-end (public facing) website, creation of videos that would be published on our front-end website, and a complete rebuild of our member-only, password-protected back-end website (intranet).

The deadline for submission of proposals is **5:00 PM, Wednesday, July 17**. Interviews with short-listed vendors are expected to occur between July 22 to July 30.

Clarification questions regarding this RFP should be directed to CAFII Operations Manager Shanay Smith at Shanay.Smith@cafii.com and keith.martin@cafii.com. All questions will be collected into one document with all the answers; the consolidated document with all the answers will be sent to all the organizations who indicate that they are participating in this RFP. The organization asking the question will be anonymous. The deadline for asking questions is **5:00 PM, Thursday, July 4, 2024** and we will attempt to send the consolidated answers by Wednesday, July 10, 2024. **Please do not contact CAFII management or volunteers directly about this RFP.**

INTRODUCTION & BACKGROUND ON CAFII

The Canadian Association of Financial Institutions in Insurance

CAFII is a not-for-profit industry Association dedicated to the development of an open and flexible insurance marketplace. Our Association was established in 1997 to create a voice for financial institutions involved in selling insurance through a variety of distribution channels. Our members provide insurance through client contact centres, agents and brokers, travel agents, direct mail, branches of financial institutions, and the internet.

CAFII believes consumers are best served when they have meaningful choice in the purchase of insurance products and services. Our members offer credit protection, travel, life, health, and property and casualty insurance across Canada. In particular, credit protection insurance and travel insurance are the product lines of primary focus for CAFII as our members' common ground.

CAFII's diverse membership enables our Association to take a broad view of the regulatory regime governing the insurance marketplace. We work with government and regulators (primarily provincial/territorial) to develop a legislative and regulatory framework for the insurance sector which helps ensure that Canadian consumers have access to insurance

products that suit their needs. Our aim is to ensure that appropriate standards are in place for the distribution and marketing of all insurance products and services.

CAFII's 15 members include the insurance arms of Canada's major financial institutions--BMO Insurance, CIBC Insurance, Desjardins Insurance, National Bank Insurance, RBC Insurance, Scotia Insurance, and TD Insurance, along with major industry players Assurant Canada, The Canada Life Assurance Company, Canadian Tire Bank, Canadian Western Bank, Chubb Life Insurance Company of Canada, CUMIS Services Incorporated, Manulife (The Manufacturers Life Insurance Company), and Securian Canada.

CAFII's Governance Structure

CAFII's management team consists of an Executive Director (Keith Martin), an Operations Manager (Shanay Smith), and a Research Analyst (Robyn Jennings). These are all paid staff members. The Association's governance structure consists of an Executive Operations Committee comprised of volunteer senior management representatives from member organizations; and a Board of Directors, comprised of C-suite executives from member organizations. The Committee that oversees the website and which will be engaged with the CAFII staff in reviewing the RFP is the Media Advocacy Committee.

TIMELINES

CAFII has identified the following timeline as a guide for its search process:

- June 27, 2024 – Distribution of RFP
- July 4, 2024—Deadline to ask Questions
- July 10, 2024—Response to Questions
- July 17, 2024 (5:00 PM) – Deadline for RFP Submissions
- July 22 to July 30, 2024 – Interviews with shortlisted vendor Companies
- Post July 30, 2024 – CAFII's Selection Decision Announced
- Post Selection Decision – Proposed Official Start Date for Successful Applicant(s)

Overview of the Requirements

CAFII has a front-end website www.cafii.com in which we have invested significant resources over the past seven years. We are looking to continue to focus on Search Engine Optimization (SEO), enhancing Google My Business, and receiving annual reporting of the performance of the website.

As part of its annual efforts to enhance the content of the website, CAFII has a supplier produce two 60-90 second videos each year. These need to be produced in English and French.

CAFII has a back-end members' only password-protected website (intranet) which is poorly designed and hard to navigate. We seek to completely rebuild this backend site.

DETAILED REQUIREMENTS

Background and Context

CAFII's front-end website is bilingual and all content, including videos, must be produced in English and French.

We use Wordpress for the front end and are satisfied with this technology. We are satisfied with the user experience, design, and navigation of the front-end and are not looking for any major changes to those experiences.

We use two suppliers for domain name and hosting, GoDaddy and CG Technologies.

CAFII's back-end website is English only, and powered by Drupal. We wish to no longer use Drupal and are inclined to use Wordpress for the backend, but are open to suggestions.

This RFP will be broken into three components: front-end website services, video production services, and back-end website services. We are asking each vendor to bid on one component, a combination of components, or all components, but each vendor must provide a separate quote for each component.

Detailed Requirements—Front End Website Services

CAFII's core requirement on the front-end website is search engine optimization. We seek to have Google and Bing searches for key phrases related to the business of our members, which is credit protection insurance, be as high as possible.

Examples of key terms for CAFII members include:

- Credit protection insurance
- Mortgage life insurance
- Mortgage Disability insurance
- Mortgage Critical illness insurance
- Mortgage Job Loss Insurance
- HELOC life insurance
- HELOC disability insurance
- HELOC critical illness insurance
- HELOC Job Loss Insurance
- Credit card balance protection insurance
- Balance protection insurance

We also seek to continue to enhance our content in Google Business Profile.

We require annual reporting, including:

- Key website metrics including traffic, broken down by province / region;
- Time spend on site and on different parts of the site;
- How users access the site and navigate within it;
- Any other relevant metrics that can provide insights into the performance of the front-end website.

Detailed Requirements—Video Services

CAFII seeks to publish two 60-90 second videos on its front-end website each year. For 2024, we believe that the graphic interface we have used in the past is adequate, but are open to suggestions. All videos must be produced in English and French. CAFII will select the topic and produce the script in English and French, but are open to creative suggestions from the vendor. The vendor is responsible for producing the video including graphics and voice-over. Examples of our expectations can be found from videos currently on the website.

As for process, we request the vendor to provide us with a high-level strategy around how the video will look; then to share mock-ups that we can modify; and only then move to production. We would ask for the vendor to indicate how many edits/changes we can submit of the mock-ups. We recognize that the vendor will have expertise in the production of the videos and the above expectations are just directional, and we will be keen to hear from the vendor what it feels are best practices to ensure the production of the best product that is most aligned with the needs of CAFII. The videos are intended to provide financial literacy information to consumers, and CAFII members who are heavily regulated also seek to demonstrate our commitment to the Fair Treatment of Customers to government regulators and policy-makers.

Detailed Requirements—Back-End Website

CAFII seeks to retire Drupal as its back-end Content Management System (CMS) and instead use Wordpress, but we are open to suggestions.

The back-end is used by members to access critical documents. We seek a complete rebuild of the back-end that is user-friendly, intuitive, and easy-to-navigate. **Therefore, a key criteria for selecting the winning bid for the back-end rebuild is superb design.**

There is existing content related to “EOC meetings” and “Board meetings” that relates to monthly EOC meeting materials and quarterly Board meeting materials that is already on the existing back-end, and all this data would need to be migrated to the new site. There is also content related to the “Weekly Digest” and “Regulatory Updates” that is already on the back-end that would also need to be migrated. These are materials that would need to be continuously updated by CAFII’s administrator as new meetings with new meeting materials occur. Members need to be able to access these materials, review them, save them, and print them. We seek to avoid hard-coded solutions and want the design to allow for additional tabs to be added over time, and for materials to be posted by CAFII’s administrator or staff. We are seeking a flexible solution that allows us to enhance the website over time, and that is easy to post on.

This would some new tabs that we would like on the site and which we would need to over time populate on the back-end with materials. These include:

- Regulatory submissions;
- Non-strategic updates;
- Consent items, EOC and Board;

We would like filters and searchable features for the back-end. For example, for the Regulatory Submissions, we would like to be able to filter based on month/year, and to search for content based on criteria like:

- Regulator;
- Province;
- Topic (privacy, technology, fair treatment of customers, incident reporting, etc.)

However, this is just an example of the filters/searchable fields for one tab. We would like flexibility about these filters and would seek to be able to add additional filters over time if possible.

The filtering/searching feature should be applicable to the entire CAFII backend and all the documents/resources we post, not just regulatory submissions. Someone should be able to search "DEI Survey", for example, and be able to see every agenda and piece of supporting documentation related to this search.

We also have 6 Committees and Working Groups that we would like to be able to store materials for in a new tab. The new tab could be "Committees and Working Groups" with sub-tabs for the six Committees and Working Groups, with the flexibility to add additional Committees or Working Groups easily.

To summarize, the essential tabs for the back-end are:

- EOC Meeting Material, organized by meeting date;
- Board Meeting Material, organized by meeting date;
- Committee and Working Groups;
- Regulatory updates, organized by date;
- Weekly Digests, organized by date;
- Regulatory Submissions;
- Non-strategic updates;
- Consent items for the EOC and Board, arranged by meeting date.

We need to have a secure backend with work emails that would be loaded into the system and allow users to gain access with a password. We would ask for an auto-reset for the password so that users who have forgotten it can easily reset it. We would explore, depending on cost, asking for 2-factor authentication where the user is asked to choose an email or text message

option for receiving a code that is entered on site to allow them entry to the site after successfully entering their password.

Criteria for Evaluating the Winning Bid

We will evaluate the winning bid based on the following criteria:

- Demonstrating capability of fulfilling on requirements
- Thorough, complete, clear answers
- Price competitiveness

PROPOSAL SUBMISSIONS—REQUIRED CONTENT

1. Review all the requirements of the position as outlined above and give a detailed response as to how your organization is able to meet or exceed these requirements, including pricing for each of the services required and any and all additional costs you would charge for.
2. What penalty structure and termination process do you propose if you are unable to meet our requirements?
3. Provide information on the professional depth, critical mass, and bench strength of your organization. What we are looking for here is evidence that you can maintain professional level of services when key personnel are not available (due to sickness, vacation etc.)
4. Competencies and Areas of Expertise--description of key areas of expertise; include examples and measurable indicators of success.
5. References
 - please provide a directory (including contact information) of your current clients, which CAFII's review Committee can contact.

Proposals must be submitted by **5:00 PM, Wednesday, July 17, 2024.**

Please submit **one electronic copy** of your proposal to:

Shanay Smith, Operations Manager, CAFII
shanay.smith@cafii.com

Keith Martin, Executive Director, CAFII
Keith.martin@cafii.com