

Real
Estate
Council
Alberta

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Request for Proposal: Communications Audit

May 30, 2017

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Introduction

Through this Request for Proposals, the Real Estate Council of Alberta (RECA) seeks a qualified consultant to undertake a communications audit of RECA's external and internal communications.

The consultant is responsible for reviewing and evaluating the effectiveness of existing RECA communications in light of its 2016-2020 Strategic Plan, and make recommendations on communications team structure, initiatives, and budget to ensure RECA communications assist the organization in fulfilling its strategic plan.

1.1 Background of RECA

RECA is the independent governing authority that sets, regulates, and enforces standards for real estate brokerage, mortgage brokerage, property management, and real estate appraisal professionals in Alberta under the *Real Estate Act*. Established in 1996, RECA has more than 60 employees in the following departments: Consumer and Industry Services, Education Services, Professional Standards, Executive Office, and Corporate Services. Communications staff members work as part of the Corporate Services department, which includes staff in IT, HR, and finance/accounting.

RECA's mandate is to protect consumers and to provide services that enhance and improve the real estate industry and the business of industry professionals.

As set out in its 2016-2020 Strategic Plan, RECA's vision is that by 2020, it will:

- set the foundation for real estate professionals to serve the public interest, protect consumers, and provide a positive real estate experience through effective establishment and enforcement of professional standards
- be recognized as an independent, responsible, and impartial governing body
- ensure real estate practitioners have a professional mindset and engage in the practice of self-regulation

1.2 Overview of the Communications Function

RECA's communications staff are responsible for the development of communications for all RECA stakeholder groups: industry members, consumers, media, industry associations, other regulatory bodies, and government officials. In conjunction with HR, RECA communications staff manage internal communications.

Communication staff responsibilities include:

- development (content and design) of a range of diverse publications, including annual report, website content, information bulletins, interpretations, briefing notes, speeches, presentations, reports, discussion papers, brochures, consumer articles and other communication vehicles, as required

- internal communications (in conjunction with other Corporate Services units), and management of RECA intranet – “RECA Live”
- management of media relations and coordination of in-house subject matter experts, development and distribution of news releases, and maintenance of positive relations with media contacts
- management of RECA's social media presence
- coordination of and attendance at industry and consumer events
- seeking out opportunities to further enhance RECA's brand and explores partnership opportunities with key industry stakeholders to build RECA's image and consumer/industry awareness of RECA

RECA Communications staff implement communications initiatives that assist the organization in fulfilling the objectives outlined in the strategic plan.

RECA's communications team includes:

- Communications Manager
- Communications Officer
- Communications Administrator

The three communications staff members are a team of communications generalists, with each member able and willing to take on a variety of tasks. The Communications Manager oversees work completed by the Communications Officer and Communications Administrator.

RECA's Deputy Executive Director and Director of Corporate Services share responsibility for direction and management of RECA Communications Team initiatives.

1.3 Goals and Objectives of the Communications Audit

1. systematic evaluation of effectiveness RECA's current communications programs and practices
2. development of recommendations that will position RECA's communications efforts to serve organizational and stakeholder needs throughout the current strategic plan, such recommendations may include but are not limited to: projects, budget, departmental structure
3. creation and implementation of a plan for development of staff skills and resource requirements to ensure the Communication function serves the evolving organizational and stakeholder needs and expectations

1.4 Scope of Services

As a minimum, RECA expects the basic Scope of Services for this communication audit to include:

1. Review and evaluate the effectiveness of current RECA communications practices, structure, and initiatives; such review to include internal and external communications, and quantitative and qualitative analysis
2. Assess the placement of RECA Communications within the current organizational structure and identify the resources necessary
3. Benchmarking RECA communication practices to those of other similar organizations.
4. Meet with RECA leadership team in advance of launching audit to communicate project goals and methodologies
5. Prepare and submit written report to RECA leadership team on project results and recommendations.
6. Other services available to assist RECA services set out in this Scope of Services.

1.5 RFP Timeline

RFP Issue Date:	May 30, 2017
Proposal Submission Deadline:	June 30, 2017
Selection of Preferred Firm:	July 21, 2017

The above dates are subject to change at our sole discretion. RECA has discretion to consider requests for extension of deadlines from Proponents.

1.6 Notice of Intent to Respond

Interested parties intending to submit a response to this RFP must register their intent via email to Natalie Scollard, Communications Manager at nscollard@reca.ca. Please include your company name, address, email address, phone number, and contact name. By registering your intent, you will have the benefit of receiving any notices of changes, clarifications or amendments to the RFP document. Upon registering your intent, RECA will send you a copy of the Confidentiality and Protection of Personal Information Agreement, which you must complete and submit along with your proposal.

1.7 RECA Contact

Direct all questions to the following contact person:

Natalie Scollard, Communications Manager

Ph: (403) 685-7902

Fax: (403) 228-3065

Email: nscollard@reca.ca

1.8 Questions

In order for RECA to deal effectively with requests for further information and questions or concerns about any terms, conditions, or requirements of this RFP, you must direct all inquiries to the RECA Contact at least five (5) business days prior to the Proposal Submission Deadline. After this time, RECA will answer questions on a best efforts basis.

It is the responsibility of the Proponent to inquire and clarify any information, data, and requirements of this RFP not clearly understood. RECA will review all such questions and requests, and will determine at its discretion what responses to provide. RECA reserves the right not to answer any particular question or questions. Proponents are responsible for notifying the RECA Contact by email, of any ambiguity, divergence, error, omission, oversight, contradiction, or item subject to more than one interpretation in this RFP, and to request any instruction, decision, or direction required to prepare their Proposal. Verbal responses to inquiries are not binding on any party, and where verbal advice is not consistent with this RFP or email response, this RFP or email response will prevail.

Please ensure you direct all communications pertaining to this RFP to the RECA Contact listed in Section 1.7. The RECA Contact is the only individual authorized by RECA to provide information about this RFP, or to respond to any questions or requests for clarification. RECA will respond to all emailed inquiries by email.

2.0 Proposal Contents

2.1 Cover Letter

Your cover letter should include a brief summary of your response, indicating your interest in providing services to assist RECA in the outlined project. An authorized person must sign the Proposal and bind the Proponent to the contract.

2.2 Information about your organization and other services offered

Describe your firm including number of employees, history, location, and other services your organization offers that you believe would assist RECA in evaluating your proposal.

2.3 Executive Summary indicating Statement of Interest, Experience, and Expertise

Include an executive summary that indicates:

- your statement of interest and understanding of the initiative
- your background and experience in providing communication audit services to non-profit, regulatory, or government agencies
- a summary of what makes you the ideal candidate to meet RECA's requirements as contemplated within this RFP under Section 1.3 Scope of Services

2.4 Qualifications and Education

Description of the personnel assigned to this project, their experience on similar projects, and education. Identify the lead associate and any management professionals or staff assigned to this project. RECA's consent is required to change any key personnel assigned to this project. You may attach detailed consultant profiles in an Appendix.

2.5 Work Plan

Propose a work plan with associated timelines that will accomplish the tasks in the Scope of Services. Number each item in your work plan. Include the following sections:

- describe the financial, human, and other resources you need from RECA to implement your work plan.
- provide a narrative describing any changes or additions to the Scope of Services you would recommend to strengthen the overall goal.
- indicate the methods you will use to engage stakeholders in this process.

2.6 Budget

The budget shall demonstrate the Proponent understands the cost factors. Include a complete detailed cost breakdown in the proposal identifying all applicable costs, including per diem rates for all personnel, travel costs, stakeholder/staff meeting costs, etc.

To facilitate comparisons, set out the budget chart in the following format:

Project Task	Consultant Name	Consultant Name	Consultant Name	Consultant Name	Total
	Number of Hours Spent on Task				
Hourly Rate	\$	\$	\$	\$	\$
1.					
2.					
3.					
...					
...					
Total Hours					
Fees Per Consultant (hours x rate)					

2.7 References

A minimum of three (3) references of current or recent clients for which the Proponent provided comparable services. References are to include the following:

- organization name;
- contact person and role;
- telephone and email address of contact person;
- general description of Project;
- date and duration of the scope of work, how it compares to the services contemplated within this RFP (i.e., length of the engagement, value of the engagement, and complexity of the deliverable, etc.).

2.8 Confidentiality and Protection of Personal Information Agreement

Each Proponent must complete a Confidentiality and Protection of Personal Information Agreement, and include it with the submission of their Proposal. Proponents are responsible for identifying any proprietary or confidential information in their proposal. RECA will make best efforts to protect any information identified as such but does not warrant that it will keep such information confidential. RECA discloses that employees of RECA or members of the Real Estate Council or Council committees may view the information in any proposal submitted.

3.0 Proposal Submission

3.1 Delivery of Proposals

Submit three (3) copies of your proposal together with a subject line referring to the RECA Communications Audit RFP. RECA must receive the proposal submission by June 30, 2017, at 4:30 p.m. Mountain Daylight time, at the following address:

Real Estate Council of Alberta
Suite 350, 4954 Richard Road SW
Calgary AB T3E 6L1
Attention: Natalie Scollard, Communications Manager

Please submit one digital copy of your submission via email to Natalie Scollard, Communications Manager at nscollard@reca.ca.

Proponents are solely responsible for ensuring the delivery of proposal submissions to RECA, free of all freight and delivery charges and any other expenses. Delays caused by any delivery service, including postal service providers, will not be grounds for an extension of the proposal submission deadline.

3.2 Proposals received after the Proposal Submission Deadline

RECA will not accept Proposals after the Proposal Submission Deadline, and will return them unopened.

3.3 Qualifications of Proponents

RECA will be the sole judge of the qualifications of all prospective Proponents, and reserves the right to reject any Proposals without recourse.

3.4 Confidential Information in Proposals

RECA is aware that information contained in the Proposals may contain sensitive or confidential information about the Proponent's current operations. Proponents are responsible for identifying any proprietary or confidential information in their proposal. RECA will confine use of this information to this RFP, and will treat all Proposals and any attachments or enclosures as confidential.

3.5 RFP Response Contact

Proponents submitting a proposal shall designate a primary contact for receipt of all subsequent information regarding this RFP.

3.6 Reimbursement

All costs and expenses incurred by a respondent for the preparation or presentation of its proposals shall be borne by the Proponent. RECA is not liable to pay such costs or expenses, to reimburse or to compensate a Proponent under any circumstances.

4.0 Proposal Evaluation Process

RECA will evaluate proposals using a framework that addresses experience, the work plan and approach, timeline for completion, and budget. RECA will base its evaluation on the information contained in the submitted proposals, information from oral interviews, reference checks, and other pertinent factors at its sole discretion.

RECA reserves the right to disqualify bids that, in its opinion, do not demonstrate the expertise, experience, or adequate resources to complete the project requirements.

RECA will only review and evaluate complete RFP submissions. During the evaluation process, RECA may interview selected Proponents for additional information to obtain further clarification on their RFP responses.

5.0 Additional Conditions

5.1 RFP Terms and Conditions

- RECA reserves the right to modify any part of the RFP prior to the Proposal Submission Deadline by issuance of one or more addenda, which will be available to all Proponents in the same manner as the original RFP.
- all documents, including the Proposal and any accompanying documentation provided by the Proponent shall become the property of RECA and RECA will not return the documents to the Proponent. The Proponent acknowledges that RECA and its representatives are entitled to use and reproduce (for RECA's internal purposes) the whole or any portions of the Proposal, notwithstanding any copyright or other intellectual property right.
- the submission of a Proposal is confidential. Proponents may not directly or indirectly, (i) publicly disclose that the Proponent has submitted a Proposal; (ii) suggest to any party that it is or will be working with RECA in any capacity, or (iii) use RECA's name or logo, or communicate with the media in relation to this RFP.
- the Proponent shall confirm as part of the Proposal that it agrees to comply with all applicable federal, provincial, and municipal laws, regulations, codes, ordinances, policies, directives and order, and to carry out its business in

compliance with the highest professional standards prevailing in its industry on behalf of RECA.

- the laws of the province of Alberta govern this RFP process.
- this RFP does not constitute an offer of any nature or kind whatsoever by RECA to the Proponents. RECA does not bind itself to accept any proposals and may proceed as it determines, in its sole discretion, following receipt of the proposals. RECA reserves the right to accept any proposal completely or in part or to discuss with any respondent, different or additional terms to those envisaged in this RFP or in such respondent's proposal.

5.2 RECA's Rights Relative to the RFP

- to cancel or terminate the RFP at any time without liability whatsoever to any respondent;
- to reject any or all of the proposals;
- to accept any or all of the proposals;
- if only one proposal is received, elect to accept or reject it;
- not to accept the lowest fixed fee amount;
- to alter the schedule; RFP process, procedures or objective of the project or any other aspect of the RFP, as it may determine in its sole and absolute discretion; or
- to negotiate with one or more Proponents to reach a final agreement for the services.

It is the nature of the RFP process that this RFP and/or the proposal submitted by the respondent in response to the RFP will not constitute a binding agreement. The Proposal will form the basis for the finalization of the terms of an agreement between RECA and the chosen Respondent, and does not mean that the Proposal is necessarily acceptable in the form submitted. RECA has the right to negotiate changes, amendments or modifications to the Proposal without offering the other Proponents who submitted proposals the right to amend their Proposals.

5.3 Delays

RECA is not responsible for any delays or costs to the Proponents associated with any reviews or the approval process.

5.4 Proposal Payment

There shall be no direct payment for the preparation and submission of proposals or attendance of interviews in response to this RFP.

5.5 Negotiations

RECA may award the Agreement based on initial offers received, without discussion. Each initial offer should contain the respondent's best terms/information, including all required documentation as listed.