



OPSEU Pension Trust

Fiducie du régime de
retraite du SEFPO

Request for Quote for Order Fulfillment Service Provider

Date Issued: November 17, 2015

Submission Deadline: November 30, 2015, 5:00 p.m. EST

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TABLE OF CONTENTS

1 Corporate Overview	2
1.1 Our Mission	2
1.2 Our Values	2
2 Purpose of the Request for Quote	3
3 Initiative Details	4
3.1 Quote Scope	4
3.2 Quote Content Requirements	5
3.3 RFQ Timing	5
3.4 Selection Criteria	5
3.5 Selection and Ranking	6
3.6 Respondent’s Understanding of the RFQ	6
3.7 Questions	6
3.8 Fees	6
3.9 Requirement for the contract	6
3.10 Obligation	6
3.11 Submission Deadline	7
4 General Provisions	8
4.1 Good Faith Statement	8
4.2 Errors and/or Omissions in the RFQ	8
4.3 Addenda	8
4.4 Status Of RFQ	8
4.5 Preparation Costs for RFQ Response	8
4.6 Liabilities	8
Schedule A: Notice of Intent	9
Schedule B: References	10
Schedule C: Resumes	11

1 CORPORATE OVERVIEW

With assets of over \$17.5 billion, the OPSEU Pension Trust (OPTrust) invests and manages one of Canada's largest pension funds and administers the OPSEU Pension Plan, a defined benefit plan with more than 86,000 members and retirees.

OPTrust was established to give plan members and the Government of Ontario an equal voice in the administration of the Plan and the investment of its assets, through joint trusteeship. OPTrust is governed by a ten-member Board of Trustees, five of whom are appointed by OPSEU and five by the Government of Ontario.

OPTrust is subject to federal and Ontario laws and regulations governing registered pension plans. As the plan administrator, our role is to prudently invest and manage the Plan's assets, ensure that members and retirees receive the pension benefits to which they are entitled, and provide them with the finest service and communications.

1.1 OUR MISSION

OPTrust is a defined-benefit, jointly sponsored pension plan. Its mission is to deliver sustainable pension security for all of its members.

To fulfill its mission, OPTrust must:

- Ensure the Plan's long-term, fully funded status
- Provide excellence in service delivery
- Foster a culture that motivates and retains talented people

1.2 OUR VALUES

Acknowledge **excellence** and constantly seek opportunities for **improvement**
Ensure **awareness**, understanding, and mitigation of the impact of the **risks** we take
Reinforce an environment of **integrity** and trust
Collaborate and communicate openly
Promote an **inclusive** workplace characterized by mutual **respect**
Hold ourselves **accountable** for our actions and our results

2 PURPOSE OF THE REQUEST FOR QUOTE

In order to fulfill our compliance obligation, OPTrust is searching for an order fulfillment service provider to print, label, envelop, stamp, and mail our Members and Pensioners' statements and newsletters. We are looking for an experienced service provider which works with large-scale organizations and has the ability to handle confidential and personal information.

The Request for Quote (RFQ) for an order fulfillment service provider will establish a Vendor of Record Arrangement (period to be established). Contractual arrangements to support work assignments, if any, will be established subsequently.

The order fulfillment service provider will report to the Vice President, Member Services.

3 INITIATIVE DETAILS

3.1 QUOTE SCOPE

The key deliverables for the order fulfillment service provider are as follows but not limited to:

1. Mass printing and mailing (approximately 50,000 units at a time); format examples include:
 - standard paper sizes – letter or legal, as required
 - booklets and/or other inserts
2. Provide Inventory control report(s)
3. Provide tangible assurance of security and confidentiality control measures commensurate with the applicable privacy legislation

Your written response should describe the following:

- your experience as mass mailer of highly confidential information
- your experience working with large companies who mail highly confidential and personal information
- your approach for ensuring inventory control
- your approach for mitigating double stuffing and/or how you ensure precise matching of content to addressee
- provide any other relevant information, references or examples of artifacts you have employed as an order fulfillment service provider
- provide a copy of your company's privacy policy.
- disclose the type of insurance your company will have in place in the event of data breach/loss
- provide your company's information security audit for our review

Your written response should also include the fee structure for providing such deliverables as identified above.

Quote Submission and Review

3.2 QUOTE CONTENT REQUIREMENTS

As part of the Quote, respondents are required to provide the documents listed below:

Schedule A: Completed Notice of Intent
Schedule B: Four References
Schedule C: Your Resume
Response to Deliverables (refer to sections 3.1 and 3.4)
Fees (refer to section 3.1 and 3.8)

3.3 RFQ TIMING

The following anticipated timing and dates could be subject to change:

Description of Activity	Dates
RFQ Issued	November 17, 2015
Completed Notice of Intent Received	November 23, 2015, 5:00 p.m. EST
Due Date for Submitting RFQ Responses	November 30, 2015, 5:00 p.m. EST
Meeting/Site Visit with Short-Listed Respondents	1 st weeks of December 2015
Notification of Outcome	December 2015

3.4 SELECTION CRITERIA

Selection of the successful Fulfillment Services will be based on, but not limited to, response to Section 3.1 and to the following criteria. Please provide detailed information for each of the criteria identified below.

1. Five or more (5+) years recent experience providing the deliverables identified in Section 3.1
2. Five or more (5+) years working with at least one large scale company providing the deliverables identified Section 3.1
3. Five or more (5+) years working with established security and privacy protocols
4. Five or more (5+) years working with established Business Continuity Plan to address system failovers.
5. Greater Toronto Area (GTA) location
6. Proven successful track record in meeting timelines
7. Acceptable site facilities to meet business need and demands
8. Cost for providing the service

3.5 SELECTION AND RANKING

As part of the RFQ review process, Quotes will be scored on the pre-determined criteria as outlined in, but not limited to Sections 3.1 and 3.4. Based on the submissions provided, OPTrust will select a respondent to be the vendor of record and contact them, in writing, with respect to the next steps. OPTrust will inform all other respondents who have submitted a Quote as to the status of their Quote; respondent relative rankings will not be provided.

3.6 RESPONDENT'S UNDERSTANDING OF THE RFQ

In responding to this RFQ, the respondent accepts full responsibility to understand the RFQ in its entirety.

3.7 QUESTIONS

Any questions that respondent may have with regards to the RFQ must be directed in writing to the OPTrust contact identified in Section 3.11. Answers will be provided in writing. Questions submitted to OPTrust will be treated in confidence.

3.8 FEES

All invoices submitted by the selected order fulfillment service provider will be billed to OPTrust in Canadian dollars. All payments by OPTrust will be issued in Canadian dollars. Unless agreed to in the contract, all expenses must be pre-approved in writing by OPTrust.

As part of your response to the RFQ, to compliment the information provided in Section 3.1, describe in detail your billing rates, practices and policies with respect to fees that would apply if you were engaged in the role and treatment of flow-through payments to Canada Post.

3.9 REQUIREMENT FOR THE CONTRACT

The contract entered into between OPTrust and the selected order fulfillment service provider will have to be acceptable to OPTrust in terms of, without limitation, standard of care, limitation of liability, insurance, confidentiality and other matters.

Please provide a copy of your standard contract.

3.10 OBLIGATION

This RFQ does not represent an obligation on behalf of OPTrust. Unless and until a definitive engagement is entered into, we are under no obligation to retain the services of an order fulfillment service provider.

3.11 SUBMISSION DEADLINE

A soft copy of your Quote must be submitted no later than 5:00 PM EST on November 30, 2015 to: Roaina Hylton rhylton@optrust.com

4 GENERAL PROVISIONS

The Fulfillment Services is expected to comply with provisions of applicable law and OPTrust policies regarding confidentiality of data and agrees not to disclose confidential data to other parties without OPTrust's prior written authorization and approval. The successful Fulfillment Services will be required to sign the *OPTrust Confidentiality and Non-Disclosure Agreement*.

4.1 GOOD FAITH STATEMENT

All information provided by OPTrust in this RFQ is offered in good faith. Individual items are subject to change at any time. OPTrust makes no certification that any item is without error. OPTrust is not responsible or liable for any use of the information or for any claims asserted there from.

4.2 ERRORS AND/OR OMISSIONS IN THE RFQ

In the event that a respondent identifies any ambiguity, error, contradiction, or general incorrectness in the RFQ document, they will be expected to inform OPTrust in writing. Identification of non-material errors and/or omissions will not constitute an extension to the RFQ deadline.

4.3 ADDENDA

In the event of an ambiguity, error, contradiction, or general incorrectness of the RFQ being identified, OPTrust will contact all respondents on a best efforts basis to inform them of the deficiency and/or omission.

4.4 STATUS OF RFQ

OPTrust reserves the right to delay, postpone, or cancel this RFQ process at any time.

4.5 PREPARATION COSTS FOR RFQ RESPONSE

OPTrust will not be held liable for any costs associated with the preparation of a response or follow-on activities for the RFQ.

4.6 LIABILITIES

OPTrust shall not be liable to any respondent, person, or entity for any losses, expenses, costs, claims, or damages of any kind:

- Arising out of, by reason of, or attributable to, the respondent responding to this RFQ and or participating in the next steps; or
- As a result of the use of any information, error, or omission contained in this RFQ document or provided during the RFQ process.

Schedule A: Notice of Intent

Name of Organization:

Authorized Representative:

Title of Authorized Representative:

Address:

Telephone Number:

E-Mail Address of Authorized Representative:

Please state your intention with regard to the Request for Quote for Fulfillment Services by selecting one of the following:

I intend to respond to OPTrust's Request for Quote

I do not intend to respond to OPTrust's Request for Quote

Signature of Authorized Representative

Date

Send this form via email to Roaina Hylton rhyllton@optrust.com no later than 5:00 p.m. on November 30, 2015.

Schedule B: References

Please provide three (3) references. Please complete a worksheet for each reference.

Name of Organization:

Date Quote Provided:

Reference Contact:

Brief description of services performed and how they relate to the key deliverables for the order fulfillment service provider.

Schedule C: Resumes

Please provide the resumes of the employees who would be assigned to this work.