

REQUEST FOR PROPOSALS #0108A

Insurance Broker and Advisor

in support of

ELIZABETH GLASER PEDIATRIC AIDS FOUNDATION (EGPAF)

1140 Connecticut Ave. NW, Suite 200

Washington, DC 20036

Firm Deadline: July 26, 2017 5 PM EST

The Elizabeth Glaser Pediatric AIDS Foundation (hereby referred to as the Foundation) a non-profit organization, is the world leader in the fight to eliminate pediatric AIDS. Our mission is to prevent pediatric HIV infection and to eliminate pediatric AIDS through research, advocacy, and prevention and treatment programs. For more information, please visit <http://www.pedaids.org>.

BACKGROUND

The Foundation has a global staff of over 2,300 – with more than 90% based in EGPAF country offices in sub-Saharan Africa. Currently the Foundation has two (2) offices in the United States (U.S.), thirteen (13) country offices in Sub-Saharan Africa and one (1) office in Geneva, Switzerland.

The Foundation's international offices are in the following countries: Cameroon, Côte d'Ivoire, Democratic Republic of Congo, Kenya, Lesotho, Malawi, Mozambique, Rwanda, Swaziland, Switzerland, Tanzania, Uganda, Zambia and Zimbabwe

In addition, the Foundation also has on-going programmatic activity in the following locations: India, Namibia, and (potentially) Nigeria

Current Insurance Plan Year

The Foundation's current plan dates are as follows:

- General Liability, Commercial Property and Casualty Package, Hired and Non-Owned Auto Liability, Employee Benefits Liability, Umbrella Liability, Workers' Compensation, Management Liability (Directors & Officers Liability, Employment Practices Liability, Fiduciary Liability & Crime), Excess Management Liability, Computer Coverage, Sexual Abuse/ Molestation, Healthcare Professional Liability, and Foreign Package (General Liability, Employee benefits liability, Contingent Auto Liability, Contingent Employers Liability Coverage): **March 8, 2017- March 8, 2018**
- Media Liability: **March 11, 2017 – March 11, 2018**
- K&R: **April 2016-April 2019**
- DBA Insurance: August to August – (Not required in current policy year, however anticipated need in future)
- Cyber (Information Security & Privacy Liability): **August 10, 2017 to August 10, 2018**
- Accident Policy (Events): **October 23, 2016 to October 23, 2017**

PURPOSE/SCOPE OF WORK

The Foundation is looking to contract an insurance brokerage firm (hereby referred to as the Firm) to partner with the Foundation and provide high-quality client service and act as advocate and advisor regarding both domestic and global insurance needs (excluding benefits coverage).

This will be a 3-year service contract.

The Foundation seeks expertise specifically in types of coverages stated on page 1 in ***Current Insurance Plan*** to act as the Foundation's representative in procuring, managing and maintaining appropriate cost-effective insurance coverage. Additionally, the Foundation seeks a Firm with the capacity to review current plans and Foundation needs. The Firm will be required to recommend additional or revised coverage by identifying issues, compliancy, and risk as appropriate.

More specifically, the Firm will be responsible for:

- a) Providing services to the Foundation's two U.S. based offices. In addition, providing expertise and advisement regarding local legal insurance requirements on physical property, workers compensation and any other types of insurance the Foundation may require due to its specific nature of work globally.
- a) Negotiating and managing relationships with insurance vendors. Specific tasks include, but are not limited to, rate negotiations, claims and timely renewals.
- b) Preparing annual reports on vendor performance and cost-effectiveness of the plans utilized by the Foundation and recommend alternatives or modifications as needed. Conduct strategic planning meetings to establish goals, priorities and identify areas of concern.
- c) Monitoring relevant legislative changes related to insurance requirements for all countries where the Foundation implements programmatic work.

EVALUATION CRITERIA AND SUBMISSION REQUIREMENTS:

Evaluation Criteria

The Foundation will accept the proposal that presents the best value. All proposals will be evaluated against the following Evaluation Criteria. Each proposal must contain the items listed in the Submission Requirements column in the following chart. Please submit your Submission Requirements in the order that they appear below.

Evaluation Criteria	Submission Requirements	Weight
A. Past Performance and Experience of the firm	See A below	20%
B) Operations and Work Approach	See B below	30%
C) Cost & Invoicing	See C below	30%
D) Experience of staff & Company References	See D below	20%

A) Past Performance and Experience of Firm

1. *Describe the Firm's experience:*
 - Provide a history of the Firm's experience providing similar services to non-profits or other organizations, with a preferred focus on international organizations, health service organizations and groups which provide health-services for children. Also describe the Firm's local, national and international (specifically in regards to those countries listed above) market leverage with the insurance market place
2. *Please provide at least three references from previous or current clients with similar needs and backgrounds as the Foundation.*

B) Operations and Work Approach

3. *Provide a detailed description of proposed work plan for responding to the following needs over the course of a three year period. Include a timeline wherever appropriate as well as proposed activities:*
 - Briefs on legislative updates and information on how the Firm assists employers in implementing any new legislation or required notice.
 - Seminars, webinars, workshops and/or trainings for Foundation staff as well as Foundation administrators on relevant topics such as insurance training, risk management, safety and security, etc.
 - In-house legal advisors and actuaries who provide counsel to clients. Include the cost in additional fees for this service, if any.
 - Proposed annual communication schedule with the Foundation.
 - Overall risk management inclusive of continual monitoring and identification of potential risk facing the Foundation as well as recommendations for risk response such as needed adjustments to the Foundation's existing level of coverage.
 - Recommendations of insurance companies for local coverage in EGPAF office international locations based on the Firm's industry knowledge and expertise. Connecting in-country Foundation teams with your network of vetted and reputable insurance companies in sub-Saharan Africa. Does the Firm have a global network?
 - Assistance with communications to the Foundation's employees, upon request
4. *Describe the Firm's information needs:*
 - What information would the Firm require while transitioning to support of the Foundation? Include steps, timetables and data that must be received from the Foundation. Include documentation and other elements needed to be turned over from the incumbent brokerage firm.
 - Describe the Firm's capacity to accommodate the current service plan dates (see above – **Current Plan** on pg. 1) and describe any issues.
5. *Describe the Firm's approach and/or process for the following:*
 - Collecting initial rate quotes and negotiating these quotes with insurance companies. What client-specific proprietary and public data sources does the Firm use in these negotiations?
 - Monitoring plan performance, utilization, cost drivers and identifying recommendations for future plan strategies
 - Assisting with routine problems, such as billing and claims issues.
6. *Describe any additional services:*

- Please list, separately, any other services that the Firm provides that may be of benefit to the Foundation. Clearly identify any of the services requested which you cannot provide or which will be provided by another entity, and your relationship with another entity.

C) Cost and Invoicing

7. *Describe the Firm's approach on pricing for recurring work:*

- Describe the Firm's proposed firm fixed price to include the price for all services and related expenses; include discounts for non-profit organizations, if any.
- Describe the Firm's billing and invoicing processes.
- Describe the Firm's annual renewal processes.
- If you receive commissions or other income, how is this tracked and reported to clients for offsetting fees?
- Does the Firm receive any commission override payments from vendor?
- Does the Firm disclose all commission income to the client, including commissions that are not required to be disclosed?

D) Experience of staff & Company References *Describe the Firm's proposed team to support the Foundation:*

- Provide the bios of individual team members that the Foundation might work with, including of each member's relevant experience. Summarize each member's years of experience at current firm, length of time working in insurance or risk management and background working with other international non-profit organizations.
- Describe the Firm's availability to travel as needed to DC headquarters

MINIMUM REQUIREMENTS:

The capacity to provide translation services for employee resources or others including, but not limited to, French and Portuguese

LOGISTICS:

The Foundation's U.S. headquarters is located in Washington, DC

KEY CONTRACT TERMS:

The anticipated contract type is: *firm fixed price 3-year contract*

Unless otherwise stated, the Contractor is responsible for providing all equipment and/or supplies required to perform the services.

All deliverables provided to the Foundation must be furnished for the use of the Foundation without royalty or any additional fees.

All Materials will be owned exclusively by the Foundation. Contractor will not use or allow the use of the Materials for any purpose other than Contractor's performance of the Contract without the prior written consent of the Foundation.

All applicants are required to be registered and authorized to perform the scope of work in the place of performance.

Proposed RFP Response Timeline:

Brokers must be available to meet the deadlines outlined below. The project timeline, subject to change, is as follows:

DATE: June 30, 2017 – Release of RFP

DATE: July 12, 2017 – Submission of Contractual and Technical Inquiries: Cathy Colbert, Awards & Compliance, ccolbert@pedaids.org with a “cc” to Meagan Wilson, Senior Manager of Administration, mwilson@pedaids.org

No phone calls please.

DATE: July 17, 2017 – Question and Answer Response Document posted on EGPAF website at <http://www.pedaids.org/pages/contracting-opportunities>.

DATE: July 26, 2017 5 PM EST - Completed proposals must be delivered electronically by the deadline mentioned on page one to: Cathy Colbert, Awards & Compliance, ccolbert@pedaids.org with a “cc” to Meagan Wilson, Senior Manager of Administration, mwilson@pedaids.org

No phone calls please.

DATE: August 30 - September 6, 2017: Shortlisted Firms in-person interviews
***Firms selected for in-person interviews will be notified by August 18th*

DATE: September 15, 2017: – Final decision announced and Offerors notified

DATE: October 1, 2017: – Contract executed and Services begin.

Please note it is our best intent to comply with the above timeline but unavoidable delays may occur.

ADDITIONAL INFORMATION

Please provide the specific RFP number on your submission.

Late proposals may be rejected without being considered.

This RFP is not an offer to enter into agreement with any party, but rather a request to receive proposals from persons interested in providing the services outlined below. Such proposals shall be considered and treated by the Foundation as offers to enter into an agreement. The Foundation reserves the right to reject all proposals, in whole or in part, enter into negotiations with any party, and/or award multiple contracts.

The Foundation shall not be obligated for the payment of any sums whatsoever to any recipient of this RFP until and unless a written contract between the parties is executed.

Equal Opportunity Notice. The Elizabeth Glaser Pediatric AIDS Foundation is an Equal Employment Opportunity employer and represents that all qualified bidders will receive consideration without regard to race, color, religion, sex, or national origin.

ETHICAL BEHAVIOR:

As a core value to help achieve our mission, the Foundation embraces a culture of honesty, integrity, and ethical business practices and expects its business partners to do the same. Specifically, our procurement processes are fair and open and allow all vendors/consultants equal opportunity to win our business. We will not tolerate fraud or corruption, including kickbacks, bribes, undisclosed familial or close personal relationships between vendors and Foundation employees, or other unethical practices. If you experience any suspect unethical behavior by a Foundation employee, please contact fraud@pedaids.org or the Foundation's Ethics Hotline at www.reportlineweb.com/PedAids/ any vendor/consultant who attempts to engage, or engages, in corrupt practices with the Foundation will have their proposal disqualified and will not be solicited for future work.