

RFP #0108A

INSURANCE BROKER AND ADVISOR

Q&A DOCUMENT

1. Why is EGPAF exploring alternatives to its legacy brokerage relationship?

A: We are required by our Foundation Procurement Policy.

2. How does EGPAF describe perfection in an insurance brokerage and risk advisory relationship?

A: EGPAF is seeking a partner who will work proactively to mitigate risk across the Foundation.

3. What does EGPAF consider its top three strategic challenges?

A: 1) Integrating HIV/AIDS programs and services with other fundamental health services 2) Fostering sustainable, quality health systems in the countries where we work 3) Driving global and local focus, support, leadership, and resources needed to end the epidemic in children, adolescents, and families.

4. What are its top 3 insurance/risk management priorities, and what help is it receiving from the incumbent broker to address those priorities?

A: 1) safety and security of staff 2) safety and security of assets 3) cost effective solutions.

5. The scope of work delineated in the RFP has a transactional emphasis, on designing, placing, and administering EGPAF's insurance portfolio. What value-additive services, if any, does the incumbent broker provide to reduce its client's total cost of risk?

A: Training and expertise

6. What qualities or services does EGPAF especially value in its legacy brokerage and risk advisory relationship?

A: Proactive focus and advocacy on our behalf, when appropriate.

7. If EGPAF could change one aspect of the relationship, what would that be – and why?

A: N/A

8. On a 1 to 5 scale (5 bring best, 1 worst), how would EGPAF rate the quality of representation it receives from its legacy broker? Using the same scale, what grade would it ascribe for the value it receives?

A: It is Foundation practice to not disclose this.

9. Describe EGPAF’s involvement, if any, in the insurance placement process.

A: Evaluate and analyze recommendations

10. We believe that the incumbent broker, as a private, family-owned enterprise, has supported EGPAF philanthropically through its family foundation. On a 1-5 scale (with 1 being “entirely unrelated/unimportant” and 5 being “absolutely necessary”), to what extent will such a gesture factor into your decision in this selection process?

A: N/A

11. Which firms have been invited to develop proposals, and through which offices? Has any company declined to respond – and if so, who?

A: It is Foundation practice to not disclose this.

12. Who will be involved in the selection of finalists, and in the selection of the winning firm? How do those people interface with risk/insurance, and what are their foremost expectations of this initiative?

A: A cross-sectional evaluation committee of EGPAF staff.

13. How long have you been with your current broker?

A: 6 years

14. When you last made a brokerage change what caused it?

A: RFP process to comply with our procurement policy.

15. Could we schedule a call or meeting in advance of our response?

A: No, we cannot respond to individual requests of this nature.

16. How are your currently serviced?

a. Frequency? Yearly renewals and advice as needed.

- b. Medium? (in person, video, phone) **phone and in person (at least 2 times a year)**
17. Will current policy copies and loss information be made available? (last 5 yrs)
- A: Copies of our current insurance policies are considered propriety information of the insurance providers. Loss information may be shared with the selected short list.**
18. What is the current broker compensation model and how does that meet the organization's needs?
- A: Yearly flat fee – this model meets our needs, but we are open to other options.**
19. How does the organization currently handle assistance services for medical, security, and political evacuation?
- GeoBlue**
(Supplemental health care coverage for travelers taking short term business trips [less than 180 continuous days] outside of their home country)
- United Health Care Global**
(Travel, Security and Natural Disaster Services, Comprehensive program providing 24/7 emergency security and travel assistance services, Security, Political and Natural Disaster Evacuation and Intelligence Updates)
- AXA Emergency Travel Assistance**
(Access to 24-hour medical, travel, legal, and financial assistance when you are more than 100 miles from your home including: Emergency medical transport)
20. How is risk assessed, managed and communicated currently at the Foundation? Is there a "Risk Committee" or other team approach? How are decisions made about when to postpone travel, scale back activities or around the risk implications of new country programs?
- A: Risk is closely monitored through a number of external resources. The Foundation teams are utilized, as necessary, to deal with unique situations.**
21. What are the current resources in place for security/operational risk management and emergency response? Are there personnel at HQ or in the field focused on these issues full or part time (security focal points, etc.)?
- A: Responsibilities are embedded in various positions – each country has a security focal point.**
22. What risk management initiatives are being reinforced across the enterprise?

A: The Foundation recently hired a Senior Director of Audit and Risk Management.

23. Please remit last two years Audited Financials

A: Please see <http://www.pedaids.org/pages/financial-information>

24. What is your Gross Payroll?

A: Please see audited financials here: <http://www.pedaids.org/pages/financial-information>

25. Please explain the Accident Policy (Events)? How many do you have a year?

A: On average about 1-2 events a year.

26. Your web site lists Russia and Angola as two countries EGPAF has activity, yet neither is shown on your RFP. Please explain.

A: Our current programmatic work has ended in these two locations.

27. Is the current remuneration based on a fee, commission or a combination and can you provide the annual total?

A: Based on a fee and we will not disclose the annual total.

28. Will contract extensions beyond the proposed 3 year period be considered by EGPAF?

A: Yes, extensions will be considered.

29. Will EGPAF engage more than one broker to provide the services and insurances described in the RFP?

A: No, however EGPAF does use another broker for our health insurance benefits.

30. Has EGPAF changed insurers of the listed policies during the service period of the current brokers?

A: Yes, as needs changed.

31. What is your current insurance spend?

A: We prefer not to release this information at this time however it may be shared with firms selected for the short list.

32. RFP mentions staff of over 2,300 with more than 90% based in offices in sub-Saharan Africa. Can you provide a breakdown of this figure by listing the number of Expatriates/ 3rd Country Nationals/ Local Nationals?

A: Global 2405, US 160, Expat 3, TCN 22, Local Nationals 2220

**Please note we did not respond to several questions intentionally for various reasons. No phone calls or follow up questions please.*