



MERCY CORPS

Request for Proposal Reference Number: **HQ502**

Expatriate, Third Country National and UK/Europe Brokerage.

Date: February 04th, 2024

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Mercy Corps Overview

Mercy Corps is a global team of humanitarians, working together on the front lines of today's biggest crises to create a future of possibility, where everyone can prosper.

Our mission: to alleviate suffering, poverty, and oppression by helping people build secure, productive and just communities.

In more than 40 countries around the world, our nearly 6,000 team members work side by side with people living through poverty, disaster, violent conflict, and the acute impacts of climate change. We're committed to creating global change through local impact — 85 percent of our team members are from the countries where they work.

We bring a comprehensive approach to every challenge, addressing problems from multiple angles. Thanks to support from our extended global community, we've provided \$4 billion in lifesaving assistance to meet the urgent needs of more than 220 million people over nearly 40 years. In addition to emergency aid, we partner with local governments, forward-thinking corporations, social entrepreneurs, and people living in fragile communities to develop bold solutions that make lasting change possible.

Through our impact, influence and innovations, in 2021:

- 13.7m reached with clean water and hygiene support
- 10.8m people reached with agricultural support
- 7.5m people reached with financials services support
- 54 active programs to build peace within communities

See more details about our impact in 2021: <http://www.mercycorps.org>

Project Background and Context

Mercy Corp's objective is to find a benefits broker that can partner with us to manage our expatriate, third country national and potentially global employee benefits including group international medical insurance, group protection policies, employee assistance programs and International Health & Security Risk Management services contracted in but not limited to the United States of America, providing informed professional advice that would help us broker the best deals and drive consistency of approach in order to level out our employee experience and protection across the globe.

The objective is to select the provider that best meets the requirements identified in this Request for Proposal (RFP) by **29th February 2024**. Mercy Corps may elect to award a contract pursuant to the Request for Proposal.

Desired Services & Scope of Work

Your proposal, as well as all the documentation required in this RFP or all the documentation you want to provide, must be attached in the form of PDF. Only the pricing aspect must be in Excel format.

Part 1: Company specifics

A. General Firm Information

Provide a brief description of your firm, including but not limited to the following:

- i. Name and address of headquarters.
- ii. Address(es) of US and UK office(s)
- iii. Name, title, telephone number, and e-mail address of key contact for this proposal.
- iv. Discuss the type of legal entity represented by your firm and whether your company is the parent company, a division, subsidiary, or branch office of another entity.
- v. Provide summary information about owners, partners, shareholders, and how long the firm has existed.
- vi. Number of employees at the organization overall and servicing location specifically.
- vii. Provide a statement on your commitment to DEI (Diversity, Equity, and Inclusion) internally at your organization.
- viii. Provide a statement on your commitment to Climate Resilience.
- ix. Describe your company's philosophy, vision, mission, and long-term strategy and how this vision benefits Mercy Corps.

B. Experience and Resources

- i. Describe your firm and its capabilities to support your capacity to perform the Scope of Work.
- ii. Provide a summary of the support, research, compliance assistance, and technical services your company makes available to your clients.
- iii. Provide a count of your existing clients categorized by large (500 or more)
- iv. Provide examples of (I)NGO clients that have similar or the same requirements as Mercy Corps. Note specific experience with humanitarian organizations.
- v. Indicate which principals and associates from your firm would be involved in providing services to Mercy Corps. Provide appropriate background information for each person and identify his or her responsibilities as well as the number of clients (and size of client) each person is expected to manage.
- vi. Provide a detailed list of three client references, including contact names, e-mail addresses and telephone numbers, for whom you have performed similar work within the last 2 years. Mercy Corp's preference is for client references from the (I)NGO or organization which seeks to improve the social circumstances in society.
- vii. Identify any conflict of interest that may arise because of business activities, ventures by your firm and associates of your firm, because of any individual's status as a member of the board of directors of any organization likely to interact with Mercy Corps. If none, please provide a statement to such effect.

- viii. Identify any material litigation, administrative proceedings, or investigations in which your firm is currently involved. Identify any material litigation, administrative proceedings, or investigations, to which your firm or any of its principals, partners, associates, subcontractors, or support staff was a party, which has been settled within the past two (2) years. If none, please provide a statement to such effect.
- ix. Describe compliance with global data privacy laws including but not limited to the EU Directive on Data Protection.

C. Account Services

- i. Describe your accounting services department. Provide details regarding the capacity to support Mercy Corps and global locations.
- ii. Describe your client services model including typical annual, quarterly, monthly, and ad hoc interactions.
- iii. Describe your process for ensuring customer satisfaction.
- iv. Summarize the kind of training (industry, internal, computer, other) your firm expects or requires your staff to receive.
- v. Provide an overview of employee communication services you offer (if any) and include a sample employee communication that you have distributed to other clients.
- vi. Detailed ways you can assist in facilitating employee meetings and employee enrolment.

D. Fee Structure

- i. Provide detailed cost proposals, including one-year and two-year term options, for providing the Scope of Work in both a commission model and consulting fee model.
- ii. Provide a list of typical services you offer your clients that fall outside of the scope of work and the associated fees.
- iii. Provide any other fee information applicable to the engagement that has not been previously covered that you wish to bring to the attention of Mercy Corps.

E. Miscellaneous

- i. Detail value-adds that your company offers to brokerage clients, if any. Examples might include wellbeing resources and expert issues advice (such as providing benefits through a DEI or Climate lens or Human Resources issues support).
- ii. Discuss any topics not covered in this RFP that you would like to bring to Mercy Corp's attention.

Part 2: Brokerage expertise

- A. **Benefits expertise:** for (a) Expatriates/TCNs, and for (b) Mercy Corps Europe (UK, Netherlands, Switzerland, Belgium)

The following benefits coverage is necessary, describe capacity to support finding most appropriate vendor:

- Traditional risk insurances (income protection, life cover, critical illness, etc.),
- Health insurance

- Wellbeing benefits
- Assistance provider coordination and insurance integration
- Retirement (Expatriate/TCN, Europe)
- International Travel, Health & Security Risk Management
- For the entire Mercy Corps global population, Business Travel Accident.

Generally, describe key factors that would lead to a reconsideration of vendor.

The following global benefits experience is not necessary but desired. Describe ability to support:

- rebate cards/ shopping discounts,
 - gyms and lifestyle,
 - wellbeing and EAP,
 - financial wellbeing and debt reconsolidation,
 - other available benefits.
- Cost containment: describe capacity to negotiate with major carriers as well as cost containment with insurers and vendors.

B. Transition management

If a transition occurs, the transition supplier will be responsible for working with our current benefits providers and brokers to transition all existing contracts and policies under their management. This must happen without any disruption to benefit provision and not cause any negative impact on the employee experience. Describe experience in this process.

C. Global Brokerage and Consulting Activities

- Describe overall global benefits and expatriate brokerage and consulting capabilities. Include information on your ability to provide a central contact and supporting team.
- Provide an overview of your firm's global total rewards capabilities including benchmarking.
- In your experience, what are the critical success factors in a successful global brokerage relationship? How is this measured?
- Describe your global benefits network and geographical reach. Is it a wholly owned network? If not, describe how you source local country expertise and how you invest in local country relationships?
- How do you work with local affiliates, what is the incentive to partner on local issues? How are affiliates compensated for support?
- How will you ensure that Mercy Corps is compliant with local regulations?
- How does your firm keep us informed on local developments in different countries?
- Please describe any local country or global opportunities to achieve cost savings and administrative efficiencies which are relevant based on our profile and footprint?
- How have you supported your clients' expansion in new countries?

- Our needs may evolve into requiring a global actuary to explore global risk pooling and captive financing arrangements. How might you deliver advice on the opportunities that exist to introduce a multinational pooling arrangement?
- Please describe your company's experience in the (I)NGO sector including years in the sector and overarching themes in terms of benefit requirements, adaptability to changing circumstances, and effectiveness and efficiency of solutions.
- Please describe your proposed transition strategy.

D. Global network.

The supplier must be able to cover benefits provision in all countries where Mercy Corps operates, whether through an affiliate organization or where an office is established.

Proactive account management. An account manager who will proactively manage service provision and be our global point of contact. This includes regular review/planning meetings incorporating latest available market intelligence, cost projections, opportunity, and risk analysis. Describe how this will occur and how impact will be measured.

E. Product presentation.

A full detailed presentation of the product and services on offer, benefit brokerage and management strategy as well as the tech platform's demo is expected. The supplier must provide evidence of a successful relationship with another client of a similar geographical spread.

F. Technology solution.

Suppliers should have a technological solution for policy management and reporting.

G. Reporting.

Technology solutions should have advanced reporting capabilities with access available to relevant Mercy Corps staff.

If a technological solution is not available, what quarterly reporting will be provided and how reporting will be used to identify strengths and weaknesses of current arrangements and future developments?

H. Claims management.

Suppliers should provide details on the process and support offered for life and health claims management, escalations, and information.

Evaluation of Proposals

Proposals will be scored using the following technical criteria. Points for each question will range from 0- 25 the maximum technical score is 100 points. Proposals should address each evaluation criteria.

- Adherence to the RFP Requirements: Did the bidder conform to all requirements and product or service specifications in the RFQ or RFP? (0-25)
- Technical Criteria: Includes the bidder's understanding of the service or procurement required, bidders' management plan, supplier's qualifications, and bidders' overall resources. Does the supplier have the right qualifications (registration, insurance, experience)? (0-25)
- Management Criteria: Includes the bidder's experience on similar projects, bidder's performance on similar projects, bidder's available facilities and resources for the project and the bidder's plan for management and control of the project. (0-25)
- Cost Criteria: Is the cost within any pre-determined price range, such as cost estimates from a market analysis? In most cases cost is evaluated using value for money unless otherwise directed by donor requirements. (0-25)

Proposal Format & Requirements

In order to secure information in a form which will ensure that your proposal will be properly evaluated, you are asked to submit your proposal in the format listed below. Standard proposal formats are acceptable provided the following information is included:

1. Name, address, telephone number and email address for principal contact.
2. A brief outline of your organization and services offered, including:
 - Full legal name, jurisdiction of organization or incorporation and address of the company
 - Full legal name and country of citizenry of company's President and/or Chief Executive Officer, and all other officers and senior managers of the company
 - Year business was established
3. Name and professional qualifications of personnel who would provide the services.
4. Names, addresses, phone numbers and email addresses of at least two clients of similar industry and scope of operations as Mercy Corps that can be contacted as references.

Note: Please send us a completed supplier information Form that is attached in addition to the other documents. Furthermore, if you have any comments on the contract template provided, please let us know; if not, it will be considered as consent.

CONTACT FOR BID INQUIRIES AND PROPOSAL SUBMISSION

✓ CONTACT FOR BID INQUIRIES

All inquiries concerning this solicitation shall be addressed to the following Designated Contacts:

Lubna Mousa, Senior Global Procurement Manager @ lumousa@mercycorps.org

All questions should be submitted in writing (via email) citing the particular bid section and paragraph number. Bidders should note that all clarifications and exceptions are to be resolved prior to the submission of a bid.

Only questions received during the Question-and-Answer period (as outlined in the RFP Calendar) will be addressed. No telephone questions will be answered. Official answers to the questions will be posted on Mercy Corps website at www.mercycorps.org/tenders

✓ **CONTACT FOR PROPOSAL SUBMISSION**

Please email an electronic version of your response (via e-mail), including all supporting documentation to the following email address:

Global Procurement at gptenders@mercycorps.org

RFP CALENDAR/TIMELINE

EVENT TYPE	DATE
RFP Published	February 04 th , 2024
RFP Responses Due	February 15 th , 2024, at 5:00PM Pacific
Vendor Meetings Week	February 22 nd – 27 th 2024

Other Terms & Conditions

WITHDRAWAL OF RFP

Proposals may be withdrawn before the RFP submittal deadline by submitting a written request to the Contact Person. Re-submittal before the RFP submittal deadline can be made; however, they may not be re-submitted after the deadline.

RFP COSTS

All costs incurred in the preparation and presentation of proposals to the RFP shall be completely absorbed by the responding party to the RFP. All documents submitted as part of the RFP will become property of t Mercy Corps. Requests for specific material to be returned will be considered. Any material submitted that is confidential must be clearly marked as such.

AWARD BASIS

At the option of the Mercy Corps, finalists for the Agent designation may be selected for a final round of negotiations; however, applicants are encouraged to present their best offers with their initial submission. Mercy Corps reserves the right to accept or reject any and all proposals, to waive any irregularities in any proposal process, and to make an award of contract in any manner in which Mercy Corps, acting in the sole and exclusive exercise of its discretion, deems to be in Mercy Corps best interest.

CONTRACTUAL DEVELOPMENT

Once an applicant is approved as the exclusive Agent, the successful respondent will enter into a contract with the Mercy Corps. Contract discussion and negotiation will follow the award selection. Bidders must be amenable to inclusion, in a contract, of any information provided whether herein or in response to this RFP, or developed subsequently during the selection process.

CONTRACT TERMS

Firms that are selected as the exclusive Agent are eligible to enter into a service contract. Mercy Corps may terminate the contract upon written notice to the Agent of not less than thirty (30) days.

EQUAL OPPORTUNITY

Mercy Corps emphasizes that all respondents will receive full consideration without regard to race, color, religion, sex, national origin, sex, disability, age, or sexual orientation. Minority and women-owned firms are especially encouraged to respond to this RFP.

LIMITATIONS

Mercy Corps reserves the right to reject any and all Proposals and to waive any informality in the solicitation process. Total proposal length excluding cover letter, details of professionals who will provide services, and contact information of client references, should not exceed 12 pages.

Sample Contract

This is the anticipated contract and is a condition to the tender. However, if required, additional terms and conditions may be added by Mercy Corps in the final contract.

Any deviations or justifications from this contract must be set out in the tender proposal with proposed alternative language.

The following is a sample of service contract template for Mercy Corps that you can review, comment on, or accept.



Service Contract
Template.docx