



AMERICAN **BAR** ASSOCIATION

Rule of Law Initiative

Request for Proposal: Health Insurance

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Bid Timetable

The ABA will make every effort to adhere to the following schedule:

Activity	Responsibility	Date
RFP submitted for posting on the ABA website and distributed via e-mail to selected bidders.	ABA	10-Dec-20
Deadline for unsolicited bidders who located this RFP on the ABA website to submit clarifying questions.	Unsolicited Bidders	8-Jan-21
Deadline to submit clarifying questions via e-mail to Philippines Procurement Team (philippines-procurement@abaroli.org).	Bidders	8-Jan-21
Deadline to answer clarifying questions	ABA	15-Jan-21
Proposals must be submitted electronically to philippines-procurement@abaroli.org by 3PM PHT.	Bidders	5-Feb-21
Review is completed and finalists are notified	ABA	30-Apr-21
Contract review by ABA's General Counsel Office	ABA	15-May-21
Effective date of contract	ABA	1-Jul-21

1.0 General Information

1.1 Purpose. The American Bar Association Rule of Law Initiative Philippines (ABA ROLI) is a non-profit program, under the ABA's Fund for Justice and Education, that implements legal reform programs

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in more than 50 countries around the world. ABA ROLI has nearly 300 professional staff working abroad and, in its Washington, D.C. office.

This request for proposal (RFP) is to establish a preferred provider for the health care service of 12 local employees and their dependents. The goal is to provide to those companies interested in submitting proposals ("Bidders") sufficient information to answer the RFP questions.

1.2 Issuing Department. The Rule of Law Initiative has issued this RFP on behalf of the American Bar Association. The sole point of contact in the ABA for this RFP shall be:

Name: American Bar Association (Philippines) Representative Office
Attention to: Procurement
Address 4/F Optima Building, 221 Salcedo Street, Legaspi Village, Makati City
Email: philippines-procurement@abaroli.org

Please refer all inquiries to: Administrative Officer at philippines-procurement@abaroli.org

1.3 Problem Statement or Type of Goods Required.

To provide health care services to 12 local employees and their dependents.

1.4 Type of Contract. The contract needs to comply with the ABA Contract Policy and will be reviewed by the ABA's General Counsel's Office. ABA entities do not have separate legal standing to enter into oral or written contracts in their own names. All contracts are entered into on behalf of the American Bar Association. ABA ROLI, in its sole discretion, may undertake negotiations with Bidders whose proposal, in its' judgment, show them to be qualified, responsible and capable of performing the project or providing the goods. ABA ROLI has the right to select the number of final bidders and the right to use one or more companies to meet its requirements. Only staff authorized by the ABA Executive Director and Chief Operating Officer has authority to execute contractual agreements on behalf of the ABA.

1.5 Rejection of Proposals. The American Bar Association reserves the right, in their sole and complete discretion, to reject any proposal received because of this RFP. ABA reserves the right to reject all offers, to waive technicalities, and to pursue procurement in a manner that is in the best interests of the organization.

1.6 Incurring Costs. The ABA is not liable for any costs the Bidder incurs in preparation and submission of its proposal, in participating in the RFP process or in anticipation of the award of the contract.

1.7 Pre-proposal Conference. There will be no pre-proposal conference.

1.8 Questions & Answers. If a Bidder has any questions regarding this RFP, the Bidder must submit the questions by email to the issuing employee named in **Section 1.2** of the RFP. Questions should be submitted **no later than** the date indicated on the Bid Timetable. The Bidder shall not attempt to contact the issuing employee by any other means.

1.9 Response Date. To be considered for selection, electronic submissions must arrive to the issuing employee on the date specified in the RFP Bid Timetable. Bidders who send proposals by mail or other delivery service should allow sufficient delivery time to ensure timely receipt of their proposals.

1.10 Proposals. To be considered, Bidders should submit a complete electronic response to this RFP, using the format provided in Section 2.0. In addition to any paper copies of the proposal, Bidders must

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submit one **complete and exact** electronic copy of the proposal via e-mail. The Bidder shall make no other distribution of its proposal to any other Bidder or ABA employee or ABA consultant. An official authorized to bind the Bidder to its provisions must sign the proposal in Appendix A. For this RFP, the proposal must remain valid for 120 days taking into consideration time required for evaluation of proposals and processing of the contract or until a contract is fully executed. If the Issuing employee selects the Bidder's proposal for award, the contents of the selected Bidder's proposal will become, except to the extent the contents are changed through Best and Final Offers or negotiations, contractual obligations.

1.11 Minority, Women and Disadvantaged Business Information: The ABA encourages participation by minority, women, and small disadvantaged and disabled veteran businesses as prime contractors, joint ventures, and subcontractors/suppliers. MWBE Businesses are businesses that are owned or controlled by a Minority and Women owned business that have a 51% ownership. The Bidder must provide documentation from a certifying agency, state and federal certification that they are a certified minority or women owned business.

1.12 Discussions for Clarification. Bidders may be required to make an oral or written clarification of their proposals to the issuing employee to ensure thorough mutual understanding and Bidder responsiveness to the solicitation requirements. The issuing employee will initiate requests for clarification.

1.13 Prime Contractor Responsibilities. The contract will require the selected Bidder to assume responsibility for all services offered in its proposal whether it produces them itself or by subcontract. The issuing employee will consider the selected Bidder to be the sole point of contact with regard to contractual matters.

1.14 Proposal Contents. Bidders should not label proposal submissions as confidential or proprietary. The issuing employee will hold all proposals in confidence and will not reveal or discuss any proposal with competitors for the contract, unless disclosure is required:

- a. Under the provisions of any State or United States statute or regulation; or
- b. By rule or order of any court of competent jurisdiction.

All material submitted with the proposal becomes the property of the ABA and may be returned only at the issuing employee's option. The issuing employee, in its sole discretion, may include any person other than competing Bidders on its proposal evaluation committee. The issuing employee has the right to use any or all ideas presented in any proposal regardless of whether the proposal becomes part of a contract.

1.15 Best and Final Offers. The issuing employee reserves the right to conduct discussions with Bidders for obtaining "best and final offers." To obtain best and final offers from Bidders, the issuing department may do one or more of the following: enter into pre-selection negotiations, including schedule oral presentations and request revised proposals.

1.16 Term of Contract. The term of the contract will be for a three year period. The final contract will contain language extending the agreement by one year with mutual agreement of the parties. The issuing employee will fix the effective date after the contract has been fully executed by the selected Bidder and by the ABA. The selected Bidder shall not start the performance of any work prior to the effective date of the executed contract and the ABA shall not be liable to pay the selected Bidder for any service or work performed or expenses incurred before the effective date of the contract.

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The contract is not considered approved until the terms have been reviewed and approved by the Office of General Counsel. An "American Bar Association Office of General Counsel" approval seal will appear on the contract with the signature of the attorney approving the terms of the contract.

1.17 Use of Electronic Versions of this RFP. This RFP is being made available by electronic means. If a Bidder electronically accepts the RFP, the Bidder acknowledges and accepts full responsibility to insure that no changes are made to the RFP.

2.0 Proposal Requirements

Bidders must submit their proposals in the format outlined below in Appendixes A - C. To be considered, the proposal must respond to every requirement in this part of the RFP. Bidders should provide any extraneous information only as a separate attachment to their proposal.

2.1 Statement of the Problem or Goods Required. Briefly state your understanding of the problem presented, services required by this RFP and any unique capabilities that your company has to deliver these services

2.2 Proposed Solution and Approach. Describe your solution in detail for accomplishing the work as specified in Section 4.0 of this document.

2.3 Evaluative Questionnaire (See Appendix B). Bidders must fully answer all questions listed in Appendix B.

2.4 Price Submittal (See Appendix C). Bidders must not include any assumptions in their price submittals. If the Bidder includes assumptions in its price submittal, the Issuing employee may reject the proposal. All direct pricing information must be submitted in C.

- a. Monthly and annual unit costs for members and dependents including beyond 65 years old for both.
- b. Membership kit (card) fee, if there's any.
- c. Benefits coverage (inpatient care, outpatient care, emergency care, preventative care, pre-existing condition, congenital condition)
- d. Access to top hospitals
- e. Access to Healthway clinics
- f. Annual check-up
- g. Dental care
- h. All amount should be in Philippine Pesos and without VAT (see Attachment A)

3.0 Criteria for Selection

3.1 Mandatory Responsiveness Requirements. To be eligible for selection, a proposal must:

- a. Be received according to dates set in the Bid Timetable;
- b. Be properly signed by a representative of the Bidder who is eligible to bind them in contract with the ABA;
- c. Be in accordance with all instructions as set forth in Sections 1 and 2.

3.2 Technical Nonconforming Proposals. The Issuing employee reserves the right, in its sole discretion, to waive technical or immaterial nonconformities in a Bidder's proposal.

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3.3 Evaluative Questionnaire, See Appendix B.

The Evaluative questionnaire consists of seven questions – bidders should complete all questions.

3.4 Criteria for Selection. The following criteria will be used, in no particular order, in evaluating each proposal:

- a. Bidder's process for receiving new enrollees and deletion of members, and invoicing orders;
- b. Financial strength of Bidder;
- d. Level of customer support offered by the Bidder;
- e. Competitiveness in pricing, including any timelines and guarantees, and special charges if there's any;
- f. Insurance coverage which includes beyond 65 years old for both members and dependents
- g. Quarterly report of usage
- h. Experience discount for low usage and if the contract is renewed the following year

4.0 Specifications and Work Statement

4.1 Objectives.

To obtain the services of a health care insurance to ABA ROLI – Philippine Representative office's 12 local employees and their dependents.

4.2 Nature and Scope of the Work needed by the ABA. The ABA requests bidders to describe their process for enrolling and deletion of members, availing medical procedures both in-patient and out-patient, and reimbursement of medical expenses.

4.3 Requirements. As described in Section 3.4 Criteria for Selection, the Association is focused on the following characteristics of the successful Bidder:

- Proven ability to provide quality health care service.
- Superior customer service.
- Competitive pricing.

4.4 Reports and Project Control. The ABA seeks bidders with a demonstrated ability to maintain timelines and regular contact with Audrey Añonuevo at ABA ROLI who handles the health insurance of ABA staff.

Thank you for your interest in working with the American Bar Association.

Appendix A – Bidder Response Sheet

Bidder Information:	
Bidder Name	
Bidder Mailing Address	
Bidder Website	
Bidder Contact Person	
Contact Person's Phone Number	
Contact Person's Email Address	
Bidder Federal ID Number If DBA in the U.S.	

Signature	
Signature of an official authorized to bind the Bidder to the provisions contained in the Bidder's proposal:	
Printed Name	
Title	

Failure to complete, sign, and return this form with the bidder's proposal may result in the rejection of the bidder's proposal.

Appendix B – Evaluative Questionnaire

Statement of the Problem or Goods Required. Briefly state your understanding of the problem presented, services required by this RFP and any unique capabilities that your company has to deliver these services.

Proposed Solution and Approach. Describe your solution in detail for accomplishing the work as specified in Section 4.0 of this document.

Please respond to each question below.

1. How many years have you been in operation? Where is your major center of operation?
2. Are you a publicly traded or private company?
3. Are you a unionized company?
4. How many clients do you have?
5. Provide references of three existing customers that we may contact. Please include names, phone numbers and emails.
6. Please describe your process for enrolling and processing of new members including turnaround time and guarantee.
7. What is your company's customer service philosophy?
8. What type of invoicing do you typically supply your customers?

Appendix C – Price Submittal

Include all costs related to health care **service**. Please refer to the full list as shown in section 2.4 of this RFP.



REPUBLIC OF THE PHILIPPINES
DEPARTMENT OF FINANCE
BUREAU OF INTERNAL REVENUE

CERTIFICATION

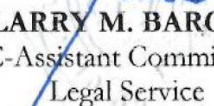
No. 2019-002

This is to certify that under Notification from the Ambassador of the Embassy of the United States of America in the Philippines (U.S. Embassy) dated 18 December 2018, **AMERICAN BAR ASSOCIATION (Philippines) – Representative Office (Freedom House)** is an Implementing Agency of the United States Agency for International Development (USAID) in the Philippines in whose favor the Bureau of Internal Revenue has issued **VAT Exemption Certificate No. 2018-550** dated 19 November 2018. As such, it is recognized by the Bureau of Internal Revenue as authorized to make local purchases of goods and services for and on behalf of the U.S. Embassy and in connection with USAID development assistance activity **Access to Justice and Support for the Rule of Law in the Philippines**.

The sale of goods and services by VAT-registered suppliers to the said Implementing Agent, which will be used exclusively for the aforementioned development assistance activity shall be subject to the value-added tax at zero percent (0%) rate, subject to the issuance of appropriate invoice or receipt, review and audit by any USAID and/or BIR representatives, and compliance with other terms and conditions laid down in Revenue Memorandum Circular No. 40-2007.

This Certification is valid until **17 December 2020** unless sooner revoked.

Done this 24th day of January 2019, Quezon City, Philippines.


LARRY M. BARCELO
OIC-Assistant Commissioner
Legal Service