

## **Public Tender**

### **Insurance Brokerage Services**

**13.11.24**

#### **1. About the Berghof Foundation**

The Berghof Foundation is an independent, non-governmental and non-profit organisation supporting people in conflict in their efforts to achieve sustainable peace through conflict transformation and peacebuilding. Its approach aims at restoring and improving broken social relations and turning conflict into constructive collaboration. In doing so we seek to help our local partners in their efforts to work towards more inclusive societies and legitimate statehood. The Berghof Foundation is based in Berlin, Germany and works in a number of countries located in Asia, the Middle East, Africa, Southeast Europe and Latin America. Berghof Foundation builds on a team of experts supported by an international network of senior advisors and associates. The organization relies on respectful and nurtured relationships with trusted partners on the ground and its projects are designed and implemented collaboratively.

#### **2. Service Specifications**

The Berghof Foundation invites prospective insurance brokers to take part in the tender process for Berghof HQ insurances, which includes a technical and commercial evaluation. Berghof aims to enter into a 3-year service contract with successful broker/s. The Berghof Foundation operates worldwide in countries across Africa, the Middle East, Asia and Latin America with approx. 130 staff in contexts of protracted crises and armed conflict. As such, there is a need to have in place key insurance cover that adequately protects against actual or potential risks.

The brokerage services required by the Berghof Foundation shall include, but not be limited to the following:

##### **a. Advisory and Placement Services**

- Advice and assistance with the development, implementation, and maintenance of a cost-effective insurance programme
- Advice and discussion regarding appropriate insurer selection including presenting to Berghof quotes for comparison where possible. Quotes should be provided on an open book basis.
- Preparation and submission of such other documentation as is necessary for the placing of insurances.
- Implementation and maintenance of insurances including negotiation with insurers and other engaged parties.
- Confirmation of insurer agreement in relation to insurances.
- Issue evidences of coverage and policies related to the insurance.

#### **b. Claims Services**

- Negotiating with insurers culminating in claims agreements/settlement.
- Development of claims protocols and the collecting and monitoring receipt of settlement funds from insurers.
- Representation when engaging with insurers on coverage matters, including resolution and management.
- Recording and capture of loss information.
- Preparation of renewal statistics.

#### **c. Accounting Services**

- Invoicing and collection of premiums due to insurers, collection, and remittance to insurer(s).
- Collection of return premiums and/or fees due from insurers and remittance to Berghof Foundation.
- Provision of accurate invoices and/or credit notes and supporting calculations in relation to premiums or rebates due.
- Assistance in the allocation of premiums and external allocation of taxes as necessary.

#### **d. General Servicing**

- Provision of comprehensive and timely response to telephone enquiries, letters, and emails.
- Actioning of mid-term amendments and policy declarations.
- Provision of regular industry and market specific communications.

### **3. Conditions of Tender Submission**

- a. Tenders must be submitted in English.
- b. Tenders must respond to all requirements set out in this Call for Tenders.
- c. Failure to respond to all requirements will result in the rejection of the tender.
- d. Tenderers must disclose all relevant information to ensure that all tenders are fairly and legally evaluated.
- e. Tenders must detail all costs identified in this Call for Tenders. Additionally, tenders must detail any other costs whatsoever that could be incurred by the Berghof Foundation in the usage of services and/or the availing of options that may not be explicitly identified/requested in this Call for Tenders. Tenderers' attention is drawn to the fact that, in the event of a contract being awarded to them, the attempted imposition of undeclared costs will be considered a condition for default.
- f. Any conflicts of interest (including any family relations to Berghof Foundation staff) involving a tenderer must be fully disclosed particularly where there is a conflict of interest in relation to any recommendations or proposals put forward by the tenderer.
- g. The Berghof Foundation will not be liable in respect of any costs incurred by respondents in the preparation and submission of tenders or any associated work effort.
- h. The Berghof Foundation will conduct this tender, including the evaluation of responses and final awards, in accordance with the details set out in the evaluation process below.
- i. The Berghof Foundation is not bound to accept the lowest, or any tender submitted.

- j. The Berghof Foundation reserves the right to split the award of this contract between different bidders in any combination it deems appropriate, at its sole discretion.
- k. the Berghof Foundation reserves the right to negotiate with the Tenderer who has submitted the lowest Bid that fully meets the technical requirements, for the purpose of seeking revisions of such Bid to enhance its technical aspects and/or to reduce the price.
- l. Information supplied by respondents will be treated as contractually binding. However, the Berghof Foundation reserves the right to seek clarification or verification of any such information.
- m. The Berghof Foundation reserves the right to terminate this competition at any stage.
- n. Unsuccessful tenderers will be notified.
- o. This document is not construed in any way as an offer to contract.

#### 4. Submission of Tender

Tenders must be delivered electronically via email to [j.galvanek@berghof-foundation.org](mailto:j.galvanek@berghof-foundation.org) by 5pm on 25.11.24. In the subject field state “Insurance Broker Services” and name of your firm. All documents attached to emails must be in PDF form. Late delivery will result in your bid being rejected. All information provided must be perfectly legible. Questions regarding the tender will be answered at the same email address until 18.11.2024.

#### 5. Proposed Timeline

Tender published	13 November 2024
Closing date for submission of clarification requests	20 November 2024 at 5pm CET
Closing date and time for receipt of Tenders	27 November 2024 at 5pm CET
Notification of Award	18 December 2024 at 5pm CET

#### 6. Evaluation Process

Tenderers will be considered for participation in the Contract subject to the following qualification process. Tenders will be awarded marks under each of the award criteria listed in this section to determine the most technically experienced and economically advantageous tenders.

- a. Price (40 marks)
- b. Technical Expertise (60 marks)

Tenderers are required to submit a proposal document of no more than 6 pages which addresses the following areas: proposed levels of service, experience of the broker, placement and marketing, management of risk, insurance premium & broker fees. The evaluation will be based on the information provided in the submitted tender and a subsequent personal interview. Interviews will be held with the three most eligible tenderers.

## 7. Awarding Criteria

### Price (40 Marks)

All prices must be in **EURO** and a comprehensive and clear breakdown of prices must be shown as part of the financial offer, including any tax, and must be shown separately.

#### a. Indicative Premium Pricing

You are required to provide your best premium indications. The indicative prices should be provided based upon your expertise, experience, and knowledge without approaching any insurance market. When a tender is submitted, it will be considered to be the Broker's best offer, although the Berghof Foundation reserves the right to undertake post-tender negotiations. The Berghof Foundation may seek further clarification on any point.

#### b. Broker Remuneration

Brokers should clearly indicate their fee for performing the services. This will need to be clearly identified in your Commercial proposal by listing all services offered for the set monthly/annual fee. For the sake of clarity, it is expected that any brokerage, commissions or similar fees allowed by insurers should fully be rebated to the Berghof Foundation and not retained by bidders. Accordingly, this should be reflected in the fee proposed by bidders. Prices offered will be evaluated on full cost basis (including all fees and taxes). Offers will be scored as below:

Desk Quote of Insurances	15 marks
Broker Remuneration	25 marks
<b>Total:</b>	<b>40 marks</b>

### Technical (60 Marks)

#### a. Proposed Service Level

Levels of service and details with regard to communication approach with the Berghof Foundation, management of workload and prioritization, measures to ensure continuous support, etc. Details of day-to-day core servicing team should be shared, including proposed account manager, broking team, claims personnel and technical and administrative support staff. Full account service is expected to include placement of the insurance programme and issuance of all relevant documentation, including the policy wording and certificates, all relevant adjustments and endorsements, processing of premium, and claims handling as required.

#### b. Experience of the Broker

Experience of broker will be evaluation according to 1) Placing packages of a similar nature and size (provide a minimum of 2 examples and achieved efficiencies/cost-savings); 2) understanding needs and requirements of non-profit type organisations (like Berghof Foundation) as they relate to insurance; and 3) a provided list of clients with whom you work in similar service.

#### c. Placement and Marketing

The following requirements should be considered, outlined, and commented upon:

1) Insurance programme structure; your ideas on any restructuring of the insurances to the benefit of Berghof Foundation; and 2) Renewal dates, details on aligning all the required insurances to a single or 2 dates for renewal. Elaborate how you recommend consolidating the policies and transitioning them to single or 2 renewal dates.

d. Management of Risk

The tenderer should explain how they can help the Berghof foundation review their insurance risk profile and manage Berghof Foundation's insurable risk in an appropriate and sustainable basis, i.e. in the form of self-retention, increased limits, geographical selection, etc.

Tenderers will be scored as below:

Proposed Service Level	15 marks
Experience of the Broker	10 marks
Placement and Marketing	20 marks
Management of Risk	15 marks
<b>Total:</b>	<b>60 marks</b>

**Note: Shortlisted bidders may be invited to present their proposal via an online or face-to-face meeting.**