# Request for Quote/Proposal (RFQ/RFP)

<table>
<thead>
<tr>
<th>Commodity/Service Required:</th>
<th>Group Life Insurance Service for Philippines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Procurement:</td>
<td>Multi-year Life Insurance Service Agreement</td>
</tr>
<tr>
<td>Type of Contract:</td>
<td>Cost Not to Exceed (NTE) Ceiling Price</td>
</tr>
<tr>
<td>Term of Contract:</td>
<td>One year term</td>
</tr>
<tr>
<td></td>
<td>*with two 1-year renewal options subject to supplier performance satisfaction</td>
</tr>
<tr>
<td></td>
<td>Period of Performance: 6 December 2023 to 5 December 2024</td>
</tr>
<tr>
<td>Contract Funding:</td>
<td>US Government, Commercial, and Indirect Projects</td>
</tr>
<tr>
<td>This Procurement supports:</td>
<td>Staff in RTI Projects in the Philippines</td>
</tr>
<tr>
<td>Submit Proposal to:</td>
<td>RTI International – Energy Secure Philippines</td>
</tr>
<tr>
<td></td>
<td>Unit 1410 One Park Drive, 9th ave. cor 11th St. Bonifacio Global City, Taguig City</td>
</tr>
<tr>
<td></td>
<td>Email: <a href="mailto:RTIPH_Operations@rti.org">RTIPH_Operations@rti.org</a></td>
</tr>
<tr>
<td>Date of Issue of RFP:</td>
<td>27 October 2023</td>
</tr>
<tr>
<td>Date Questions from Supplier Due:</td>
<td>3 November 2023, 5:00 PM (Manila, PH Time)</td>
</tr>
<tr>
<td>Date Proposal Due:</td>
<td>10 November 2023, 5:00 PM (Manila, PH Time)</td>
</tr>
<tr>
<td>Approximate Date Purchase Order Issued to Successful Bidder(s):</td>
<td>20-24 November 2023</td>
</tr>
</tbody>
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## Method of Submittal:

Softcopy submission

Respond the bid proposal to RTI International with document in MS Word or and pdf format by email and share link of Google drive, if exceeding maximum of 20MB to: RTIPH_Operations@rti.org

**RTI International – Energy Secure Philippines Activity**

Unit 1410 One Park Drive, 9th ave. cor 11th St. Bonifacio Global City, Taguig City.

The instruction for proposal submission explains in Annex 1. Of this RFP.

The Bidder/Seller agrees to hold the prices in its offer firm for **60 days** from the date specified for the receipt of offers unless another time is specified in the addendum of the RFP.

**Solicitation Number:** ESP-RFQ/P-2023-333

RTI International is a trade name of Research Triangle Institute. RTI and the RTI logo are U.S. registered trademarks of Research Triangle Institute.
Attachments to RFP:

1. Attachment “A” – Commodity Specifications
2. Attachment “B” – Instructions to Bidders/Sellers
3. All PO Terms and Conditions are listed on our website at: 
   https://www.rti.org/sites/default/files/rti-purchase-order-terms-and-conditions-v1.16.pdf, 
   http://www.rti.org/files/PO_FAR_Clauses.pdf or for commercial items: 
   Supplier’s delivery of products, performance of services, or issuance of invoices in connection 
   with this purchase order establishes Supplier’s agreement to the Terms. The Terms may only 
   be modified in writing signed by both parties.

   All bidders/sellers are responsible to carefully review each attachment and follow any instructions 
   that may be relevant to this procurement.
Attachment A
Commodity Specifications or Statement of Work

Statement of Work

Indicate a description of the activity/service that is expected from the supplier. Provide product specifications or service expectations (both if applicable). Include deliverables, timelines, and any special terms and conditions.

Description of Activity/Service:

RTI International is a leading nonprofit research and development organization that has supported governments, foundations, and private-sector clients working across Asia for more than 35 years.

RTI is currently implementing six (6) active small to large-scale projects in the Philippines with estimated 330 full-time employees and dependents onboard, stationed in different cities and provinces across Luzon, Visayas and Mindanao. If RTI in the Philippines is awarded additional projects in the future, the staff member base will keep growing as well.

As the current annual period of life insurance for staff expires on 5 December 2023, the RTI group of projects in the Philippines is issuing this Request for Proposal (RFP) to solicit Group Life Insurance Provider proposal to benefits and services outlined and described under Section A: Product or Service Expectations.

Given continuously developing situations brought about by the COVID-19 pandemic, the Philippines group feels strongly about the need to ensure that our group life insurance is up-to-date, able to address current situations and be prepared for emerging conditions. This RFP will allow us to know and consider innovative terms that Group Life Insurance Provider can offer in addition to current benefits and services coverage.

Product or Service Expectations (both if applicable):

Our life insurance provider is to provide full time 24 hour/365 days Group Life Insurance coverage to eligible full-time employees of RTI in the Philippines.

Key Scopes of Cover:

1) For Principal members (Employees aged 18-65 years old; Employees aged 66-70 years old)
• Amount of insurance coverage.
• Detailed life insurance coverage and riders
  o Basic Life Insurance – Ages 19 to 70 - P1,000,000
  o Accidental Death, Dismemberment & Disablement Benefits – Ages 18 to 65 – P1,000,000
  o Total and Permanent Disability – Ages 18 to 60 - P1,000,000
  o Terminal Illness Benefit – Ages 18 to 65 - P750,000
  o Family Assistance Benefits – Ages 18 to 65 – P20,000
2) The successful bidder is responsible for all administrative requirements of contract, including supplying all necessary forms, employee sign up, claims processing, submission quarterly of claims experience, etc. on-site administrative support, as necessary, is requested.
3) The successful bidder is to hold the same premium rate and same Terms and Conditions to any additional project won by RTI International in the Philippines.
4) Provide a dedicated point person who is customer-oriented and has strong product knowledge.
5) Provide clear guidelines for claim management and high standards of service level agreement.

Eligibility Requirements:
Only supplier/s that submitted the following requirements are eligible for proposal opening:
1) Documentation/Certification of Non-Brokerage
2) Financial capacity, copy for Audited Financial Statement (the last 2 years)
3) Legal Registration

Deliverables, Timelines, Special Terms and Conditions:
The Life Insurance coverage is for the period from 6 December 2023 to 5 December 2024.

<table>
<thead>
<tr>
<th>Employee</th>
<th>ABC+</th>
<th>Act EAST</th>
<th>RTI ARO</th>
<th>ESP</th>
<th>ReachHealth</th>
<th>SIBOL</th>
<th>UPSKILL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age 18-65</td>
<td>57</td>
<td>2</td>
<td>3</td>
<td>33</td>
<td>86</td>
<td>37</td>
<td>35</td>
</tr>
<tr>
<td>Overage 66-70</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>33</td>
<td>3</td>
<td>1</td>
<td>35</td>
</tr>
<tr>
<td>TOTAL</td>
<td>57</td>
<td>2</td>
<td>3</td>
<td>33</td>
<td>89</td>
<td>38</td>
<td>35</td>
</tr>
</tbody>
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## Pricing

Supplier/s will submit pricing options of premium other than the premium required by RTI.

### A. Group Life Insurance

<table>
<thead>
<tr>
<th>Status</th>
<th>Annual Premium</th>
<th>Semi-Annual Premium</th>
<th>Quarterly Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Unit PHP</td>
<td>Total PHP</td>
<td>Unit PHP</td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age 18-65</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overage 66-70</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
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</tbody>
</table>

### B. Offer for Refunds and Pre-Termination

<table>
<thead>
<tr>
<th>Status</th>
<th>Refund PHP</th>
<th>Pre-Termination PHP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

By signing this attachment, the bidder confirms he has a complete understanding of the specifications and fully intends to deliver items that comply with the above listed specifications.

Signature: 
Title: 
Date: 
Attachment “B”
Instructions to Bidders/Sellers

1. **Procurement Narrative Description:** The Buyer (RTI) intends to purchase commodities and/or services identified in Attachment A. The Buyer intends to purchase the quantities (for commodities) and/or services (based on deliverables identified in a Statement of Work). The term of the Ordering Agreement shall be from Award Date to the Delivery date of the Offeror unless extended by mutual agreement of the parties. The Buyer intends to award to a single “approved” supplier based on conformance to the listed specifications, the ability to service this contract, and selling price. We reserve the right to award to more than one bidder. If an Ordering Agreement is established as a result of this RFQ/RFP, supplier understands that quantities indicated in the specifications (Attachment A) are an estimate only and RTI does not guarantee the purchase quantity of any item listed.

2. **Procuring Activity:** This procurement will be made by Research Triangle Institute (RTI International), located at

<table>
<thead>
<tr>
<th>RTI International – Philippines</th>
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<tbody>
<tr>
<td>c/o Unit 1410 One Park Drive, 9th ave. cor 11th St. Bonifacio Global City, Taguig City</td>
</tr>
</tbody>
</table>

(insert full address of the office)

who has a purchase requirement in support of a project funded by

<table>
<thead>
<tr>
<th>US Government, Commercial and Indirect Projects</th>
</tr>
</thead>
</table>

(insert client’s name)

RTI shall award the initial quantities and/or services and any option quantities (if exercised by RTI) to Seller by a properly executed Purchase Order as set forth within the terms of this properly executed agreement.

3. **Proposal Requirements.** All Sellers will submit a quote/proposal which contains offers for all items and options included in this RFQ/RFP. All information presented in the Sellers quote/proposal will be considered during RTI’s evaluation. Failure to submit the information required in this RFQ/RFP may result in Seller’s offer being deemed non-responsive. Sellers are responsible for submitting offers, and any modifications, revisions, or withdrawals, so as to reach RTI’s office designated in the RFQ/RFP by the time and date specified in the RFQ/RFP. Any offer, modification, revision, or withdrawal of an offer received at the RTI office designated in the RFQ/RFP after the exact time specified for receipt of offers is “late” and may not be considered at the discretion of the RTI Procurement Officer. The Seller’s proposal shall include the following:

(a) The solicitation number:

(b) The date and time submitted:

(c) The name, address, and telephone number of the seller (bidder) and authorized signature of same:

(d) Validity period of Quote:
(e) A technical description of the items being offered in sufficient detail to evaluate compliance with the requirements in the solicitation. This may include product literature, or other documents, if necessary.

(f) If RTI informs Seller that the Commodity is intended for export and the Commodity is not classified for export under Export Classification Control Number (ECCN) “EAR99” of the U.S. Department of Commerce Export Administration Regulations (EAR), then Seller must provide RTI the correct ECCN and the name of Seller’s representative responsible for Trade Compliance who can confirm the export classification.

(g) Lead Time Availability of the Commodity/Service.

(h) Terms of warranty describing what and how the warranties will be serviced.

(i) Special pricing instructions: Price and any discount terms or special requirements or terms (special note: pricing must include guaranteed firm fixed prices for items requested).

(j) Payment address or instructions (if different from mailing address)

(k) Acknowledgment of solicitation amendments (if any)

(l) Past performance information, when included as an evaluation factor, to include recent and relevant contracts for the same or similar items and other references (including points of contact with telephone numbers, and other relevant information)

(m Special Note: The Seller, by his response to this RFQ/RFP and accompanying signatures, confirms that the terms and conditions associated with this RFQ/RFP document have been agreed to and all of its attachments have been carefully read and understood and all related questions answered.

4. **Forms**: Sellers (potential bidders or suppliers) must record their pricing utilizing the format found on Attachment “A”. Sellers must sign the single hardcopy submitted and send to address listed on the cover page of this RFQ/RFP.

5. **Questions Concerning the Procurement**: All questions in regards to this RFQ/RFP to be directed to

   **Celine L. Constantino**, HR Officer, Energy Secure Philippines Activity

   *(insert name of procurement officer)*

   at this email address:

   **RTIPH_Operations@rti.org**

   *(insert email address of the procurement officer).*

   The cut-off date for questions is *(insert date).*

   3 November 2023, 5:00 PM (Manila, PH time)

6. **Notifications and Deliveries**: Time is of the essence for this procurement. Seller shall deliver
the items or services no later than the dates set forth in the contract that will be agreed by both parties as a result of this RFQ/RFP. The Seller shall immediately contact the Buyer’s Procurement Officer if the specifications, availability, or the delivery schedule(s) changes. Exceptional delays will result in financial penalties being imposed on Seller.

7. **Documentation**: The following documents will be required for payment for each item:
   (a) A detailed invoice listing Purchase Order Number, Bank information with wiring instructions (when applicable)
   (b) Packing List
   (c) All relevant product/service documentation (manuals, warranty doc, certificate of analysis, etc.)

8. **Payment Terms**: Refer to RTI purchase order terms and conditions found in https://www.rti.org/sites/default/files/rti-purchase-order-terms-and-conditions-v1.16.pdf, http://www.rti.org/files/PO_FAR_Clauses.pdf, or http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf. Payment can be made via wire transfer or other acceptable form. Sellers may propose alternative payment terms and they will be considered in the evaluation process.

9. **Alternative Proposals**: Sellers are permitted to offer “alternatives” should they not be able to meet the listed requirements. Any alternative proposals shall still satisfy the minimum requirements set forth in Attachment A Specifications.

10. **Inspection Process**: Each item shall be inspected prior to final acceptance of the item. All significant discrepancies, shortages, and/or faults must be satisfactorily corrected and satisfactorily documented prior to delivery and release of payment.

11. **Evaluation and Award Process**: The RTI Procurement Officer will award an agreement contract resulting from this solicitation to the responsible Seller (bidder) whose offer conforms to the RFQ/RFP will be most advantageous to RTI, price and other factors considered. The award will be made to the Seller representing the **best value** to the project and to RTI. For the purpose of this RFQ/RFP, price, delivery, technical and past performance are of equal importance for the purposes of evaluating, and selecting the “best value” awardee. RTI intends to evaluate offers and award an Agreement without discussions with Sellers. Therefore, the Seller's initial offer should contain the Seller's best terms from a price and technical standpoint. However, RTI reserves the right to conduct discussions if later determined by the RTI Procurement Officer to be necessary.

12. The evaluation factors will be comprised of the following criteria:
   (a) **PRICE - 40 points**. Lowest evaluated ceiling price (inclusive of option quantities).
   (b) **TECHNICAL - 40 points**. Items/Services shall satisfy or exceed the specifications described in RFP Attachment A and demonstrate capability and resources to provide the items/services requested in this solicitation in a timely and responsive manner and evidences that provide services
   (c) **EXPERIENCE PAST PERFORMANCE - 20 Points** - Seller can demonstrate his/her positive performance from the other clients.

13. **Award Notice**. A written notice of award or acceptance of an offer, mailed or otherwise furnished to the successful supplier within the time acceptance specified in the offer, shall
result in a binding contract without further action by either party.

14. **Validity of Offer.** This RFP in no way obligates RTI to make an award, nor does it commit RTI to pay any costs incurred by the Seller in the preparation and submission of a proposal or amendments to a proposal. Your proposal shall be considered valid for **120 days** after submission.

15. **Representations and Certifications.** Winning suppliers under a US Federal Contract are required to complete and sign as part of your offer RTI Representations and Certifications for values over $10,000.

16. **Anti-Kick Back Act of 1986.** Anti-Kickback Act of 1986 as referenced in FAR 52.203-7 is hereby incorporated into this Request for Proposal as a condition of acceptance. If you have reasonable grounds to believe that a violation, as described in Paragraph (b) of FAR 52.203-7 may have occurred, you should report this suspected violation to the RTI's Ethics Hotline at 1-877-212-7220 or by sending an e-mail to ethics@rti.org. You may report a suspected violation anonymously.

17. **The John S. McCain National Defense Authorization Act for fiscal year 2019 - section 889.** RTI cannot use any equipment or services from specific companies, or their subsidiaries and affiliates, including Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, and Dahua Technology Company ("Covered Technology"). In response to this request for proposal, please do not provide a quote which includes any Covered Technology. Any quote which includes Covered Technology will be deemed non-responsive. Additionally, if the United States Government is the source of funds for this RFP, the resulting Supplier shall not provide any equipment, system, or service that uses Covered Technology as a substantial or essential component.

**Acceptance:**

Seller agrees, as evidenced by signature below, that the seller’s completed and signed solicitation, seller's proposal including all required submissions and the negotiated terms contained herein, constitute the entire agreement for the services described herein.

By: *(Seller Company Name)*

Signature: ____________________________________________
Title: _______________________________________________
Date: _______________________________________________