

**Invitation to Tender Dossier**

For the provision of Insurance Brokerage service Medical and Group Life insurance for all Plan International Nigeria Employees

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| Tender Main Facts Table | |
| Tender reference | PIN/CO/22/009 |
| Tender launch date | 5th April, 2022 |
| Clarifications | *To be submitted within 30 working days of advert to* [*Nigeria.Procurement@Plan-International.org*](mailto:Nigeria.Procurement@Plan-International.org) |
| Contract Manager | Country Admin and Logistics Manager |
| Deadline for submission of offers | 6th May, 2022 |
| Address for submission of offers | Plan International Nigeria No 49 Anthony Enahoro Street, Utako district, FCT, Abuja  Or  Hard copies can be submitted in all Plan offices, but soft copies are encouraged. |
| Estimated date of award of contract(s) | 23rd May, 2022 |
| Duration of contract | One year |

**Submission of offers to Plan office**

Procurement Department

Plan International Nigeria,

No 49 Anthony Enahoro Street,

Utako district, FCT,

Abuja.

***Queries related to this tender must be addressed to***

***Nigeria.Procurement@plan-international.org***

***Please include the tender reference number above in all correspondence***



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1. Introduction

Successful Tenderers will be expected to enter into a formal contract with Plan International.

Each successful Tenderer is intended to be a Provider, but the contract pertaining to this tender shall not constitute an exclusive contract and Plan International, at its sole discretion, reserves the right to enter into agreement with other suppliers, for the same type of services at any time, whenever it deems it necessary.

Plan International Nigeria will exercise its rights to enter into formal one-year contract with the supplier and issue consequent supplies for the same or similar items within the one-year period under this project or other projects in Nigeria.

If you believe that your company may be in the position to meet any of our specified requirements and would like to be considered as a potential supplier **firstly complete and return Annex 1 – “Confirmation of Intention to Tender” as soon as possible, and thereafter complete and submit all the required documents as listed in Annex A, B, C, D and E**.

This tender dossier has been issued for the sole purpose of obtaining offers for the supply of goods or services against the specification contained within this document and Annexes. Plan International reserves the right not to enter into or award a contract as a result of this invitation to tender.

Any attempt by the Tenderer to obtain confidential information, enter into unlawful agreements with competitors or influence the evaluation committee or Plan International during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of its offers and may result in the termination of a current contract where applicable.

Bids will be assessed by a procurement panel against set criteria, including bid eligibility, the extent to which the Requirements have been met and the overall value for money proposition. Bids should include detailed information on the following technical requirements for each category. Please complete the following tables in your submission and feel free to attach additional information on your product offerings.

1. **Background Information on Plan International**

Plan International is an independent development and humanitarian organization that advances children’s rights and equality for girls.

We believe in the power and potential of every child. But this is often suppressed by poverty, violence, exclusion and discrimination. And its girls who are most affected. Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children.

We support children’s rights from birth until they reach adulthood. And we enable children to prepare for – and respond to – crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

We have been building powerful partnerships for children for over 75 years, and are now active in more than 70 countries.

Read more about Plan International's Global Strategy: 100 Million Reasons at <https://plan-international.org/strategy>

1. **Scope**

The Broker shall effect the most advantageous placement of insurance coverage including but not limited to the terms and conditions of coverage, continuity and cost. In addition, the Broker must be capable of providing a full range of value-added services.

The BROKER shall designate an account manager to be assigned to this account to act as the primary contact for Plan International Nigeria. If for any reason Plan Nigeria finds, in its sole discretion, that the service provided by any assigned personnel is unsatisfactory, the BROKER will agree to assign replacement personnel that must also be approved by Plan Nigeria, Personnel assigned to the account must have a minimum of three (3) years’ experience in the insurance sector.

1. **Qualifications of Contractor**

**Selection Criteria:**

Quotations should be comprehensive and highlight how the bidding company intends to meet up with our requirements as stated above, in addition to clearly stating service costs and/or rates of commission, proposals should include the following;

**Vendor requirement for Pre-qualification:**

* Company Profile including names and contact details of key personnel
* Evidence of valid registration with corporate affairs commission with the (1) Copy of Memorandum and Article of Association (2) Copy of forms CAC2 and CAC7.
* Evidence of tax clearance certificate or registration of Tax Identification Number (TIN)
* NAICOM license
* Evidence of registration with the Nigerian Council of Registered Insurance Brokers;
* Audited Accounts in respect of the last three years;
* Tax Clearance Certificate for the year-ended 2021; and

*Please read this section carefully and be sure that all requested information is included in your submission. Evaluators will neither make assumptions nor draw inferences regarding missing or incomplete information. The submission of incomplete information could result in the rejection of submissions*

**5. Selection Criteria**

Plan International Nigeria will evaluate the responses in 3 phases;

* Technical review
* Financial review
* Face to face Interview (Via Teams or physical meeting)

**Weighted evaluation criteria;**

* Financial capacity Bank reference letter -  20%
* Proposed HMO coverage & group life % premium - 30%
* Competitive Price - 30%
* Evidence of past performance (in form of award letter or reference letter)-

20%

**6. List of documents to be submitted with the offer**

Offers must be inclusive of the following documents:

|  |  |  |
| --- | --- | --- |
| **Document** | **Rationale** | **Form** |
| Confirmation of intention to tender |  | See Annex A |
| Supplier Questionnaire  Inclusive of Health & Safety Policy, ISO Accreditation and any other requested policies as outlines in the questionnaire). All suppliers should complete this form unless they have already completed a similar form within the last three years | The Tenderer demonstrates commitment to the standards and principles in the Ethical Purchasing Policy and to assessing and managing risks in the supply chain | See Annex B  Supply chain verification |
| Completed “Tenderer’s Declaration” document | The Tenderer signs to show that they have fully understood and accepted the tender document | See Annex C |
| Contact details of three Referees | Contacting the Referees, Plan International can be assured on competency of Tenderer | Type of contract, period of performance, company name, contact name, telephone number, e-mail |
| Bid details |  | See Annex D |
| List of Tenderer’s main customers including any Non-Governmental Organizations and U.N. agencies who have been supplied similar commodities in the last five years. | The Tenderer assures Plan International on its experience in the sector | As necessary to provide Plan International with proper and complete information |
| Audited accounts for the last three years | The Tenderer demonstrates it has resources to perform the contractual obligation | This should include both Profit and Loss account and Tenderer’s Balance sheet |
| Evidence of tax payment and exempt status where applicable | The Tenderer provides evidence of payment of tax in the last three financial years as applicable and demonstrated within the laws of the country | Tax certificate from recognized institution with the sole responsibility of issuing tax certificate |
| If the Tenderer is not an individual person, Certificate of Company Incorporation | Evidence of corporate’s identity | As per the legal requirements in the State of incorporation of the Tenderer |
| Company profile | The Tenderer provides information on its structure. | As necessary to provide Plan International with proper and complete information |
| Management of Contract Proposal + Reporting | Tenderer to provide information on how they would manage the Plan International contract and advise on how the type of management reports Plan International could expect | As necessary to provide Plan International with proper and complete information |

**(Repeated) A completed Tender must include the following information:**

* Provide a company profile showing an overview of your firm and its ownership/organizational structure, philosophy/culture and number of employees.
* Describe your firm’s marketplace leverage in negotiating with carriers in regards to rates, policy terms and plan design. Describe your view of the role of a Broker in this type of relationship and what differentiates your firm from other brokerage-consulting firms, and give reference of other organization you provide services for.
* Do you help with claims and/or coverage? Describe the action that would be taken, the support provided, in investigating and settling a disputed claim.

**7. Clarifications**

The onus is on the Tenderer to ensure that its offer is complete and meets Plan International’s requirements. Failure to comply may lead to the offer being rejected without any reason being given. Please therefore ensure that you read this document carefully and answer fully all questions asked.

**8. Evaluation of offers**

Plan International, at its sole discretion, will select the winner of this tender.

Plan international shall be free to:

* Accept the whole, or part only, of any tender
* Accept none of the proposal tenders
* Republish this request for Tenders

Plan International will not be liable for any costs or expenses incurred in the preparation of the tender.

**Please note that if we do not get across to you 2 weeks after the close of this tender then you are not selected.**

Plan International reserves the right to keep confidential the circumstances that have been considered for the selection of the offers.

Part of the evaluation process may include a presentation from the Tenderer and a site visit by Plan International staff.

Value for money is very important to Plan International, as every additional £ saved is money that we can use on our humanitarian and development work throughout the world

**9. Proposed Timelines**

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| --- | --- |
| **Activity** | **Deadline Date** |
| Launch of Tender | 5th April, 2022 |
| Supplier opportunity for any Questions & Answers surrounding this Tender | 29th April, 2022 |
| Deadline for submission of offers | 6th May2022 |
| Supplier Short-List Notification | 16th May, 2022 |
| Contract Award | 23rd May, 2022 |
| Contract signing | 25th May, 2022 |

10. Submission of offers

The offer must be sent to the address specified on page 1. It must be via registered post with acknowledgement of receipt or hand-delivered against receipt signed by a Plan International representative.

Offers must be received before the deadline specified in the “Tender Main Facts Table” above.

The offer and all correspondence and documents related to the tender must be written in English or native language

All offers must be submitted in one signed original, marked “original”, and one copy signed and marked “copy”. In case of discrepancies, information in the “original” shall prevail on “copy”. As well as the paper responses there should also be one copy in the form of a CD (If applicable)

All offers, inclusive of any annexes or supporting documents, must be submitted in **one sealed envelope (You may also Staple)** bearing only:

a) The address;

b) The tender reference number/name stated in the “Tender Main Facts Table”;

d) The words “Not to be opened before the tender opening session”;

e) The name and address of the Tenderer.

Each Tenderer or member of consortium or sub-contractor may submit only one offer. The offer can be for one entire lot or more entire lots.

Do note that the delivery of the commodities will be at the Niger state central medical store or other warehouse in Minna, Niger state as directed at the time of supply.

Subsequent supplies will be as notified by Plan international Nigeria.

Offers are to remain fixed for a one-year period after the deadline for submission date. There is the potential for a one-year extension if prices quoted remain the same as during the first year.

**Mode of Submission:**

Interested companies should forward their company Proposal either electronically via email to [Nigeria.procurement@plan-international.org](mailto:Nigeria.procurement@plan-international.org) or Hard copy to

**Plan International Nigeria**

**Attention: Country Admin and Logistics Manager**

No 49, Anthony Enahoro Street, Utako District,

Abuja, Nigeria.

Tel: +234 9-2921781

Questions concerning tender can be sent via email to [Nigeria.TenderInquiry@plan-international.org](mailto:Nigeria.TenderInquiry@plan-international.org) with PIN/CO/22/009 Provision of insurance brokerage service on the subject line.

Bids submitted after the deadline will **NOT** be accepted.

For further Info, call: +234 9- 2921781

Closing date for submission of the Tendering package is before **23:59 on 6th May 2022.**

**11. Contract Payment terms**

Tenderers are invited to note that, if awarded the contract, Plan International’s standard terms of payment will be on or before **30 days** after the end of the month of receipt of invoice or, if later, after acceptance of the Goods/Services/Works.

An advance payment may be provided at the discretion of Plan International and not more than 50% of the total contract sum, provided an insurance bond or bank guarantee is obtained and verified.

**12. Disclaimer**

Plan International reserves the right to alter the schedule of tender and contract awarding.

Plan International reserves the right to cancel this tender process at any time and not to award any contract.

Plan International reserves the right not to enter into or award a contract as a result of this invitation to tender.

Plan International does not bind itself to accept the lowest or any tender.

Plan International shall not be liable in respect of any costs incurred by the Tenderer in the preparation of the offer nor any associated work effort, including the production of presentation materials, brochures, product specifications or manuals for evaluation.

**13. Plan International’s Ethical & Environmental Statement**

1. The organization should establish environmental standards and good practices that follow the principles of ISO 14001 Environmental Management Systems, and in particular to ensure compliance with environmental legislation.

2. The organization should seek to set reduction targets in areas where the organization’s activities lead to significant environmental impacts.

**Annex Contents List**

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| Annex A | Confirmation of intention to tender and receipt of copy documents | All tenderers to complete |
| Annex B | Supplier Questionnaire | All tenderers to complete |
| Annex C | Tenderer’s Declaration | All tenderers to complete |
| Annex D | Quotation and Supplier questions | All tenderers to complete |
| Annex E | Non-Staff Code of Conduct | All tenderers to Sign |