



Reference # MHSE/DHI/S/2016/01

5th April 2016

Letter of Invitation

Request for Proposals for Overseas Care and Cost Management Provider

Dear Bidders

The Government of Bermuda, Health Insurance Department seeks qualified Tenders to this request for the outsourcing of its Overseas Care and Cost Management. Tenders are invited from individuals or companies who are fully experienced and qualified in administering Care and Cost Management through electronic receipt and processing, who will also provide the Health Insurance Department (HID), Government Employees Health Insurance Department (GEHI) and (Lady Cubitt Compassionate Association (LCCA) with a consolidated cost effective solution for a comprehensive program as outlined within this Request for Proposal (RFP).

CONTRACT PERIOD: Contracts arising from this Request for Proposal will be for a period of 36 months with an option to renew for an additional 12 month period. Start date will be dependent upon agreed implementation plan.

Please submit a sealed Tender in accordance with the Requirements Document attached.

To enable you to submit a tender, please find enclosed:

- This Letter of Invitation
- Instructions to Bidders
- Appendix I: Requirements Document: Outlining the Department's requirements
- Appendix II: Company's Organizational Profile
- Appendix III: Company Information Form
- Appendix IV: Certificate of Confirmation of Non-Collusion

This letter is not to be construed in any way as an offer to contract with your Company.

We look forward to receiving your tender and thank you in advance for your interest in Government procurement opportunities.

Yours Sincerely,

Calvin C. C. White Sr., FCGA, ACIS, PAdmin.
Acting Director
Health Insurance Department



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INSTRUCTIONS TO BIDDERS

These are the conditions by which this RFP process will be governed.

Public Access to Information

Any information collected or used by or on behalf of the Government of Bermuda (“Government”) under this solicitation document is subject to the Public Access to Information Act 2010 (“Act”). The information belongs to a class of information that might be made available to the general public under the Act. Any questions regarding the collection, use, or disclosure of the information should be directed to the public authority that issued this solicitation document.

Sequence of Events

The following table outlines the schedule associated with this RFP

Actions	Dates and Times
Issuing of RFP (Published on https://www.gov.bm/procurement-notice)	Friday 8 th April 2016
Deadline for Clarifications and Questions from Bidders	22 nd April 2016
Posting of the responses to Bidders questions and /or Government Addenda	29 th April 2016
Bidders Response to RFP – Submission	5pm ADT – 6 th May 2016
Review and Evaluation of Bidders Submissions	20 th May 2016
Presentations for Proof of Concept	The exact times and dates will be communicated directly to selected shortlisted Bidders
Award of Contract	Upon Cabinet Approval - TBD

1. Submission Deadline

- i. Tenders must be received no later than 5:00 pm, Atlantic Standard Time (AST), on 6th May 2016.
- ii. Tenders received after the stated deadline will be considered as a 'NO BID' and 'VOID'.
- iii. The time stamp for tenders submitted electronically will be that of the Information Technology Office (ITO) mail server.
- iv. It is the Bidder’s responsibility to allow enough time for electronic transmission and delivery, especially in the case of large files. Please note that the largest allowable file to the Government server is 9mb, and so any submissions that exceed this size must be either compressed or sent in several emails and titled in the subject line.



2. Procedure for Submitting Questions and Enquires

- i. Questions pertaining to this RFP must be submitted IN WRITING via e-mail to skreilly@gov.bm. Please be as specific as possible, citing the section/number where possible. Questions must be submitted by the deadline provided. The Health Insurance Department will provide a written response to all pertinent questions in the form of an Addendum which will be posted at <https://www.gov.bm/procurement-notices> under the Procurement Notice website and sent to all Bidders via email.
- ii. The addendum will be sent in writing by email to all prospective bidders who have provided their point of contact and will be binding upon them. Prospective bidder shall promptly acknowledge receipt thereof by email to skreilly@gov.bm
- iii. In order to afford prospective bidder reasonable time in which to take an Addendum into account in preparing their proposal, the Government may, in its sole discretion, extend the deadline for the submission of proposals in accordance with sub-clause "Deadline Extension for Submission of Proposal."
- iv. Questions must be submitted by the questions deadline, as specified in "Important Dates" (Section 21). Questions after this deadline will not be answered.
- v. At any time before the submission deadline of the RFP, the Government may alter or amend, in whole or in part, any terms or provisions of this RFP. The Government will communicate any such modification or amendment in the form of addendum.

3. Deadline Extension for Submission of Proposal

The Government may, at its discretion, extend the deadline for submission of proposals by issuing an addendum in which case all rights and obligations of the Government and the Proponents previously subject to the original deadline shall thereafter be subject to the new deadline as extended.

4. Late Tenders

Late tenders WILL NOT BE CONSIDERED. The deadline is absolute and tenders received after the due date and time shall not be considered. Bidders must select a method of delivery that ensures tenders will be delivered to the correct location by the due date and time, as specified in "Important Dates" (Section 21) below.

5. Submission Delivery

- i. Submissions must be delivered by e-mail to: skreilly@gov.bm;
- ii. Electronic submissions must have [Ref # MHSE/DHI/S/2016/01 and Health Insurance Plan – Overseas Care and Cost Management Provider in the subject line;
- iii. All submissions must be in Microsoft Word and Excel (not pdf)



- iv. All submissions become the property of the Government of Bermuda and will not be returned. All conditions contained in the RFP are considered accepted by the Bidder in any information submitted.
- v. Submissions may be from individual Bidders or multiple Bidders. In the case of multiple Bidders, one party must be clearly identified as the primary Bidder, with all others being indicated as secondary Bidders.
- vi. Alternatively, a sealed envelope with hard copies (3 copies required) of the tenders may be delivered to the following address:-

Health Insurance Department
2nd floor, Sofia House,
Church Street, Hamilton

The outer envelope must clearly be marked with the title 'Request for Proposals for Health Insurance Department – Overseas Care and Cost Management Provider

Do Not Open until 5:00 p.m. AST on 6th May 2016

6. Letter of Submission

Each tender must be accompanied by a Letter of Submission that:

- i. identifies the submitting Bidder;
- ii. includes a statement indicating which Bidder, if multiple Bidders are proposing jointly, intends to act as primary Bidder and contact for tender evaluation questions and the delivery and maintenance of all post-tender correspondence;
- iii. Includes a brief statement of the Bidder's understanding of the work to be done and a summary of the proposed definition of services to be delivered.
- iv. identifies the name, title, address, telephone number, fax number, and e-mail address of each person authorized by the Bidder to contractually obligate the Bidder;
- v. identifies the name, title, address, telephone number, fax number, and e-mail address of the Bidder contact;
- vi. includes a statement that the person signing the transmittal letter is authorized to legally bind the Bidder;
- vii. is signed by the person(s) authorized to contractually obligate the organization; and
- viii. Acknowledges receipt of amendments to this RFP, if any.



7. Bidder Submission

Submissions must include the following information:

- i. **Proposed Definition of Services to be delivered** – A description of the proposed solution that will meet the requirements set out in the Requirements Document. The description should set out the services provided to support the requirements. A schematic may prove useful with fulfilling this requirement. The description should also set out the proposed approach to training and documentation.
- ii. **Proposed Approach** – a description of the proposed approach for the delivery of the requirements outlined in the Requirements Document.
- iii. **Company Information** - Including Bidder qualifications and experience as well as background information on the personnel proposed to work on the project, the size of staff, overall capabilities, and a brief description of who will be assigned to the Overseas Care and Cost Management account.
- iv. **Costs** – this refers to the total cost to complete the requirements, information architecture and all tasks associated with these deliverables.

A payment schedule must be included that contains milestones and the associated payment amount.

It should include, but not be limited to, a breakdown of hourly/daily rate chargeable in Bermuda dollars, number of hours/days to completion and any other costs (expenses).

In addition, the Costs shall include all labor, materials (software), equipment, tools, and expenses necessary to perform the Scope of Services. Include the rates and prices list. The price shall include, indicate separately, the cost of any work permits, and applicable taxes.

Cost of Acquisition - This refers to the total cost to implement the services, and a description of any pass-through costs and costs for additional services not anticipated at the time of contracting. A payment schedule must be included that contains milestones and the associated payment amount. In accordance with the Government of Bermuda standard development contract, the first milestone and associated payment amount on the schedule must be for the Statement of Work. All costs quoted should be “as landed” (i.e. including duty and shipping) costs in Bermuda Dollars.

Annual Costs - This should identify the annual recurring costs such as ongoing administration costs, costs to adjudicate claims, and any pass-through costs, and costs for additional services not anticipated at the time of contracting.

- v. **Project Plan and Methodology** – a description of the proposed approach/methodology which will be used to deliver the tasks outlined in the Requirements Document must be



included. The Bidder must also include as part of its approach a detailed Gantt chart developed in Microsoft Project 2007®, or a comparable product, that contains all major project tasks of the proposed approach. The Gantt chart must include at a minimum:

1. Detailed tasks and dependencies
2. Task start and end dates

The Bidder must describe the project methodology they will use for the project. This segment of the tender should establish the appropriateness and value of the proposed methodology in relation to this RFP.

Bidder should identify other projects they have completed of a similar nature. Bidder should identify the potential risks which, in their experience, occur on projects of this type. In addition, the Bidder should identify steps that can be taken by the Bidder or by the Government of Bermuda to avoid or mitigate these risks.

Activities should be incorporated in the project plan to reduce the occurrence, severity and effect of events or situations that can compromise attaining any project objective. This description should convey the level of detail involved in each activity and identify the significant milestones that occur in each area.

- vi **Required Government Resources** – any resources required of the Government of Bermuda must be identified. Such resources may include staff, office space, training facilities, computer hardware, networking, cabling, or other supplies, etc.
- vii **Additions or Deletions** - All tenders will be considered final. No additions, deletions, corrections or adjustments will be accepted after the Submission Deadline.

8. Pre-submission Information

- i. All prospective Bidders will be provided with this documentation and the opportunity to submit written enquiries to the Department Contact by sending an e-mail to: skreilly@gov.bm.
- ii. The responses will be communicated to the Bidders who have responded, by email, without identifying the source and will also be posted on <https://www.gov.bm/procurement-notice> procurement notice website

9. Bidder Responsibility

It is the Bidder's responsibility to ensure its complete understanding of the Requirements Document and instructions specified by the Department. In the event that clarification is required Bidders should submit written enquiries as described in paragraph 7 above.



It is the Bidder responsibility to periodically check the <https://www.gov.bm/procurement-notice> procurement notice website for any and all addendum, notifications, and releases associated with this RFP.

10. Amendments

At any time before the close of the RFP, the Bermuda Government may alter, amend, delete or add to, in whole or in part, any terms or provisions of this RFP. The Bermuda Government may modify, amend or revise any provision of this RFP or issue addendums at any time. The Health Insurance Department will communicate any such modification or amendment to the Bidders via email and posted to the <https://www.gov.bm/procurement-notice>.

11. Review Process/Evaluation Criteria

The tenders submitted to the Government of Bermuda will be evaluated in a two-stage process based on the standard Government of Bermuda evaluation. The first stage is a qualitative evaluation of each tender by the individual project team members followed by moderation and consolidation resulting in a short list of potential Bidders. Subsequently, client references will be taken up for the short listed Bidders; then they will be requested to make a presentation.

11.1 Tender Responsiveness (Pass/Fail):

Tenders will be reviewed to determine compliance with all baseline requirements. Submission must be timely, and all required documentation must be included. Tenders that are late or that fail to contain the required documents and information will be considered nonresponsive and will be disqualified from further consideration.

11.2 Tender Review and Evaluation (Phase 1)

The tenders will be evaluated against the general criteria and weighted scores will be applied as described in the Evaluation matrix attached as Appendix II.

The Department may seek written clarification from any or all Bidders in order to better understand and evaluate the proposed solution. This process may not be used as an opportunity to submit missing documentation or to make substantive revisions to the original tender.

11.3 Presentations/Oral Interviews (Phase 2)

Bidders who are short listed (tenders determined to have scored in the competitive range) may be invited to present oral presentations for the purpose of introducing key members of the evaluation team, and allowing the Department to fully understand the Bidder's ability to meet the evaluation criteria. Oral presentations will not be scored



separately. Instead the Department may modify tender scores (on the Evaluation Matrix) and resulting rankings based on the oral presentation.

The Bidder contact identified in the tender must be the lead presenter in the oral presentation.

12 Negotiation

The Department reserves the right to enter into discussions or to negotiate with a Bidder as it sees fit, or with another Bidder or Bidders concurrently. At no time will the Government of Bermuda be required to enter into discussions or negotiations on similar or other terms or offer any modified terms to any other Bidder before entering into a binding contract. The Government of Bermuda shall incur no liability to any Bidder as a result of these discussions, negotiations or modifications.

- i. The Government reserves the right to enter into negotiation in writing or with one or more bidders to this RFP.
- ii. The Government reserves the right to enter into multiple contracts resulting from this RFP or to enter into a contract on a non-exclusive basis. The Government may contract with others for the same or similar products and/or services or may obtain the same or similar products and/or services internally or may otherwise obtain the same or similar products and/ or services by other means.

13. References

Before awarding any contract the Department reserves the right to require the Bidder to submit evidence of qualifications as it may deem appropriate. This evidence may include financial, technical and other qualifications as well as the relevant experience and skills of the Bidder.

14. Final Award

The final award recommendation will be based on the highest scoring tender as determined by total points and rank using criteria and weights as stated above in addition to suitability and experience in administering an Overseas Care and Cost Management Plan through electronic receipt and processing.

14.1 Notice of Award

The Government will notify the successful Bidder and unsuccessful Bidders in writing by email, facsimile or registered letter, after Cabinet Approval has been received.

14.2 Protest Procedures

If an unsuccessful Bidder wants to dispute the award recommendation, the protest must be submitted via email to skreilly@gov.bm. no later than ten (10) calendar days after the announcement of the successful Bidder, detailing the grounds and providing all



supporting information, for review by the Acting Director of the Health Insurance Department. Disputes received after the 10 calendar days from the contract award will not be considered.

14.3 Delinquent Taxes

The contract will not be awarded to any Bidder who is delinquent with its' taxes (including land, payroll, social insurance) to the Government of Bermuda.

14.4 Payment Terms

Payments will be authorized on invoices 30 days after receipt of the services. All responses must include any proposed variations to these standard payment terms for discussion and negotiation.

15 Acceptance and Authority to Cancel this RFP

The Government of Bermuda will not be obliged to accept the lowest price or any of the tenders submitted. Each Bidder acknowledges and agrees that the Government of Bermuda will have no liability or obligation to any Bidder, except to the Bidder, if any, awarded a contract by the Government of Bermuda in its sole discretion and it shall be fully and forever released and discharged of all liability and obligation in connection with this Request for Proposal (RFP). The Government of Bermuda will not make public the Bidder submissions and reserves the right to cancel this RFP at any time prior to the execution of a contract, without any obligation or reimbursement to any Bidder. The Department shall not be obligated to respond to any tender submitted, nor be legally bound in any manner by submission of the tender.

16 Confidentiality

All submissions shall be regarded as containing proprietary information and shall remain confidential from the public. Access will only be by Government of Bermuda employees or agents reviewing the RFP. The Government of Bermuda is not obliged to award orders or contracts to companies based on the information received. Details regarding the final contract award (name of Bidder and price) may be publicly announced.

17 Services and/or Application Delivery

The solution is accepted as delivered when the service is running in production mode and is considered in a steady state for 3 months from the 'go live' date and has been signed off by the Health Insurance Department.



18 Ownership

All information produced as part of the project is owned expressly by the Government of Bermuda. The Bidder can only take possession of relevant Government of Bermuda information when granted by the Project Authorities, and only for the purposes of carrying out the objectives of this project. Use of the data for purposes other than this is strictly prohibited and requires written authorization by the Government of Bermuda.



**Request for Proposals for Health Insurance Plan
Overseas Care and Cost Management
APPENDIX I Requirements Document**

A Overview

The Department is responsible for the administration of four health insurance products legislated by the Government of Bermuda under the Hospital Insurance Act 1970 and the War Pensions Act 1970. The benefits provided by the Health Insurance products are designed to take care of those who are unable to obtain insurance due to affordability or insurability. As a result, the Health Insurance products provide a significant social benefit to numerous communities in Bermuda.

The Health Insurance products are:

1. The Health Insurance Plan (HIP) which is available to individuals and employers wishing to insure their employees in Bermuda
2. FutureCare which is a comprehensive plan specifically designed for Bermuda's seniors (over 65)
3. The Mutual Reinsurance Fund (MRF) which is a supplemental funding tool to pay claims and is available to all individuals who are covered by health insurance in Bermuda
4. The Government Subsidy Program which provides health insurance benefits to various segments of the Bermudian population

The primary administration functions the Health Insurance Department performs include:

- Registering and administering both HIP and FutureCare policyholders for individual and employer groups and the seniors
- Receiving claims, determining eligibility, claim adjudication and payment of claim benefits for those eligible for the health insurance products
- Management of the Government Subsidy Program

The Health Insurance Plan (HIP) and FutureCare currently administer approximately 6,700 Health Insurance policies and processes approximately 215,000 claims annually with an additional 5,000 (approx.) dental claims. Dental and local claims are not to be considered as part of this RFP

The Government Employees Health Insurance (GEHI) was created to ensure that all Government employees, pensioners, and their dependents are adequately covered under the GEHI by maintaining accurate employee records and processing all claims in a timely manner and to provide premium health care at reasonable rates. GEHI currently processes approximately 201,000 medical claims annually.



The Lady Cubitt Compassionate Association (LCCA) was established in 1932 by Lady Cubitt, wife of the Governor at the time, and incorporated in 1945 with the objective “to relieve poverty, suffering, distress, and to promote happiness and well-being amongst those in our community who are less fortunate.” Today, the commitment continues and these objectives still remain with the LCCA. Administered on behalf of the Bermuda Government, Ministry of Health and Family Services, the programme assists patients in financial need who must be sent overseas for medical and surgical treatments not available in Bermuda. The programme recognizes that certain patients have little or no insurance and limited ability to pay. LCCA currently administer approximately 130 Health Insurance policies and processes approximately 3,300 medical claims annually.



B Vision of the Overseas Care and Cost Management

HID, GEHI and LCCA (the Group) are looking for a consolidated contract which will manage all of the Overseas Care and Cost Management for each organization. These services are currently being managed separately. The group is looking for an arrangement that would allow all aspects of the maintenance of the overseas claims product including capturing all policyholder/patient information, the receipt, electronic processing and payment of medical claims. Detailed reports will be provided by the Bidder to the individual Departments on a monthly basis which would include, but not be limited to those as defined below.

Members of the Group will subsequently and individually reimburse the Bidder the cost of the medical claims and administration for their policyholders. All payments to the Bidder will be paid directly by the Group member.

The Group will require access to relevant reports and/or systems to answer queries from walk-in customers and to ensure adequate management reporting.

The Group will require all data needed to manage the products to be captured electronically, enabling us to manage on a proactive basis.

1. Patient centered care management that includes transitioning the patient between the care on island and overseas and their return to Bermuda. Care management includes:
 - a. care coordination for care , services needed
 - b. providing person centered information and education regarding their condition and treatment to policyholders,
 - c. facilitating and exchanging communication, sharing of records, health information between patient, local provider, and overseas provider and back regarding treatment, expectations, and coverage related to plan.
 - d. Identifying and assessing the person in need of further care management and “handing off” to HID clinical care managers for continuity of care.
 - e. Thorough knowledge and access to clinical standards of care (evidence based practice) with physician consultation or review when needed.
2. Reporting of clinical data to the individual Group members:
 - a. utilization patterns for disease type, treatment type, facility use, cost, and volume
 - b. Patient outcomes / ratings for facilities related to clinical reasons for treatment



- c. Patient satisfaction surveys after care.
3. Cost containment mechanisms-
 - a. Comparison of cost between facilities for same treatment
 - b. Case rates
 - c. Negotiated discount rates
 - d. Established networks
4. Educational programming for local physicians regarding evidence based best practice, and overseas network facilities options and availability of services (with HID collaboration) regarding coverage of HID plans.
5. Ability and willingness to negotiate for further discounts in cost when patient has financial need.

C Scope of the Overseas Care and Cost Management

1. ADMINISTRATIVE SERVICES REQUIREMENTS

- a) A dedicated direct dial and toll free line to be personally answered 7 days per week, 24 hours per day.
- b) Coordination of billings, letters of coverage, co-ordination of payment.
- c) Provision of medical information and medical research on regions throughout the world.
- d) Co-ordination of billings relating to medical evacuations.
- e) Co-ordination of medical audits that require a physician's and/or a registered nurses' expertise, as requested.

2. WORLDWIDE EMERGENCY MEDICAL ASSISTANCE SERVICES

Medical

- a) Live 24-hour Worldwide medical and dental referrals
- b) Evaluation and monitoring of treatment
- c) Emergency medical evacuation and repatriation
- d) Facilitation of hospital admissions and discharge planning
- e) Continuous updates to family, employer, and/or home physician
- f) Assistance in replacing prescription medications, corrective lenses, and medical devices
- g) Coordination of medical records transfers, emergency vaccine and blood transfers. If legally permissible.
- h) Administration/coordination of Healthcare Provider bills
- i) Insurance coordination:



- Verification of coverage to hospital or Healthcare Providers
- Payment coordination to Healthcare Providers once eligibility of claimant and claim is established

Personal

It is expected that the successful Bidder will be equipped to provide a high level of personal concierge services including:

- i. Coordination of return of dependent children
- ii. Coordination of transportation to join a disabled family member
- iii. Coordination of emergency family-travel arrangements
- iv. Immediate and compassionate assistance in crisis situations
- v. Emergency transfer of funds
- vi. Guidance with the replacement of lost or stolen passports and other travel documents
- vii. Emergency translation services and referrals to interpreters
- viii. Referrals to attorneys/bail bond assistance
- ix. Emergency message transmittals
- x. Coordination of vehicle return
- xi. Coordination of emergency pet housing and/or pet return
- xii. Referrals to specialized security providers
- xiii. Continuous updates to family, home physician, and/or employer as requested

3. COORDINATION OF MEDICAL EVACUATIONS

When it has been determined that a medical evacuation is required for transfer the Bidder will perform all of the necessary action in order to safely transfer a patient according to the terms and conditions of the Policy.

Air Ambulance Evacuation

It is expected that the total management for Air Ambulance Evacuation will be provided by the Bidder and an agreed upon workflow will be established during the implementation planning.

4 COST MANAGEMENT SERVICES

It is expected that the following are the minimum cost management services provided.

- a. With respect to health-care services provided at non-US hospitals:
The Bidder will provide access to its proprietary preferred international provider network of hospitals and physicians, as necessary.
 - i. The Bidder will ensure any discounts available through the international provider network, is in the best interest of the Group.
 - ii. The Bidder will assist in setting reserves by securing estimates of hospital and medical costs.
 - iii. The Bidder will attempt to guarantee direct payment to Healthcare Providers, eliminating the need to provide payment prior to treatment.



- b. With respect to Healthcare services provided at United States' hospitals it is expected that the Bidder will:-
- i. manage the patient's cares in the United States utilizing primarily direct contracts and PPO networks to maximize savings.
 - ii. In situations where a managed care discount is not automatically available, negotiate directly with Healthcare Providers on a case-by-case basis.
 - iii. audit physician and hospital bills for accuracy prior to submission of the claim for payment.
 - iv. assist in setting reserves by securing estimates of hospital and medical costs.
 - v. attempt to guarantee direct payment to Healthcare Providers, eliminating the need to provide payment prior to treatment.
 - vi. provide a dedicated P.O. Box in the United States to receive healthcare provider bills. These claims are sent electronically to the Bidder twice weekly.

In an ongoing effort to affect the greatest savings the Bidder and departments and LCCA will work together to improve processes and workflows to maximize the volume of claims dollars that can be directed into the most cost effective US Healthcare Providers.

CLAIMS

The claims process is identical for both US and non-US cases, in that during initial contact with the Overseas Healthcare Provider, The Bidder

- i. is responsible for pre-screening all claims based on pre-determined control procedures, which is done to ensure that the charges are correct and all services are accounted for
- ii. will reprice the claim and apply a discount, if applicable
- iii. following approved for payment, send an authorization report to the Group member detailing the payments that are owing

The Group member will pay the amounts owing under the Healthcare Policies and distribute cheques to the Healthcare Providers

The Group will jointly develop the agreed-upon method for sending updates with the final payment information.

5 NON-U.S. SERVICES

The Bidder will provide the following who require treatment outside the USA for covered services. The Bidder will work together with the Group to set up a process of pre-certifying the treatment. The Bidder will provide the following services in all pre-certified cases.

Care Management

Care Management should include the following:

- a) Coordinating out-of-country medical treatments and non-medical services
- b) Monitoring and review of care provided to ensure that it is appropriate



- c) Managing the referral of cases back to the home country as soon as medically appropriate
- d) Providing various periodic reports, including real-time web access regarding the status of each case
- e) Providing logistical information and other services for patients and their family members

Medical Services Arrangements

The following Medical Services arrangements are expected to be provided by the successful Bidder.

- i. Obtain all necessary pre-operative medical notes from the home GP/treating Physician
- ii. Arrange all appointments with Overseas Healthcare Provider, including any pre-op appointments
- iii. Provide cost estimates
- iv. Confirm assignment of benefits with Healthcare Provider
- v. Develop follow-up plan; i.e., follow-up home appointments
- vi. Assess Customer's member's fitness of travel both prior to leaving the home country and at the point of discharge

Non-Medical Services Arrangements

- i. Arrange flight to medical destination with focus on Customer's fitness to travel and coordinate all flight requirements; e.g., wheelchair, oxygen etc.
- ii. Assist with booking of hotel and transportation for both the Customer and their family
- iii. Assist in additional concierge services; i.e., translation services, document replacement, issuing visas



APPENDIX II Company's Qualification Profile

Please provide here a ONE PAGE outline description of your company. Your description should include brief information on the following:

- Company history & origins
- Period of Operation
- Core business activities
- Types of Services
- 3 client references with contact details
- Particular attributes of your firm which make it well suited to perform the services required in this RFP



APPENDIX III Company Information

QUALIFICATIONS AND REFERENCES

Company Information - Including Bidder qualifications and experience as well as background information and a brief description of who will be assigned to the Overseas Care and Cost Management account.

Name of Company _____

1. Principal(s) and Director(s) of the Company:

Physical Address:

Email:

Website:

3. Company Bermuda Payroll Tax No.: _____

4. Company Bermuda Social Insurance No.: _____

6. Company Banking Details:

Name and address of primary bankers:

7. Do you have any involvement with other entities that may be seen as a conflict of interest? If so, please provide details:



COMPANY INFORMATION (CONTINUED)

Name of Company: _____

8. The Company has been engaged in business, under the present business name for _____ years.

9. Number of Employees

TOTAL NUMBER OF STAFF	
NUMBER OF BERMUDIAN	
NUMBER OF NON-BERMUDIANS	
PERCENTAGE OF BERMUDIANS	

10. Attach a copy of the Company's Certificate of Incorporation.

Signed: _____

Print Name: _____

Title: _____

Company: _____

Date: _____



APPENDIX IV CERTIFICATE OF CONFIRMATION OF NON-COLLUSION

Notes for the tenderer/bidders

The essence of Open Tendering is that the Government of Bermuda shall receive bona fide competitive Tenders from all persons tendering. In recognition of this principle, each company that submits a tender will be required, by way of the signature of a duly authorized representative of the company, to confirm that the tender has been submitted without any form of collusion.

All tenderers/bidders/bidders must complete and sign a Certificate of Confirmation of Non-Collusion. Any tenders submitted which do not include a signed copy of the Certificate will be wholly rejected and will not be included in the evaluation process.

If it is later found that the undertakings made below have been breached at any stage of the procurement process, then the tenderer will be expelled from the process immediately. In the event that this is discovered after a contract award, legal action may be taken against the tenderer and/or any party involved in the matter.

Any tenderer that submits false information in response to a tender, and any other person or company involved in collusion, may be excluded from tendering for future contracts tendered by the Government of Bermuda.

Confirmation of non-collusion

I/We certify that this is a bona fide Tender, intended to be competitive and that I/We have not fixed or adjusted the amount of the Tender or the rates and prices quoted by or under or in accordance with any agreement or arrangement with any other person.

I/We confirm that we have not received any information, other than that contained within the tender pack, or supplementary information provided to all tenderers/bidders.

I/We also certify that I/We have not done and undertake that I/We will not do at any time any of the following acts:

- (a) Communicating to a person other than the tender administrator the amount or approximate amount of my/our proposed Tender (other than in confidence in order to obtain quotations necessary for the preparation of the Tender for insurance) or
- (b) Entering into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount of any Tender to be submitted; or
- (c) Offering or agreeing to pay or give or paying any sum of money, inducement, gift /hospitality or valuable consideration directly or indirectly to any person in relation to this tender.

Signed

(1) _____ Title _____ Date _____

(2) _____ Title _____ Date _____

For and on behalf of



APPENDIX V Form of Agreement

TENDER TO: the Government of Bermuda, Department of Health Insurance

For the provision of Health Insurance for Overseas Care and Cost Management:

1. We confirm that we, the undersigned, are conducting business as a proper legal entity and are not delinquent in making payments for outstanding debts for Government receivables such as Social Insurance contributions, Payroll Tax and Public Works (formerly Works & Engineering) fees
2. We confirm that we have submitted a bona fide Tender, intended to be competitive and we have not fixed or adjusted our Price by or under or in accordance with any agreement or arrangement with any other bidder.
3. Having reviewed the Request for Proposals, the service requirements and Addenda Nos. _____ inclusive for the execution of the above named Overseas Care and Cost Management we, the undersigned, offer to provide Overseas Care and Cost Management in accordance with the **Instructions to Bidders, and all enclosed documents** herein called the *RFP Documents*).
4. We undertake, if our tender is accepted, to commence the Services as soon as is reasonably possible after the receipt of the Project Manager's notice to commence, and to provide the Services comprised in the *Contract Documents*.
5. We confirm that our Tender shall remain open for acceptance by the Government of Bermuda, the Judicial Department for a period of ninety (90) **calendar days** from the date of this undertaking and we shall not withdraw this Tender during this period.
6. Unless and until a formal Agreement is prepared and executed this Tender, together with your written acceptance thereof, shall constitute a binding agreement between us.
7. We understand that you are not bound to accept the lowest or any tender that you may receive.
8. We declare that this tender is made without any connection, comparison of figures or arrangements with or knowledge or any other corporation, firm or person making a tender for the same work and is in all respects fair and without collusion or fraud.
9. We consent to the collection and use of any information we give to the Government in response to this solicitation document and waive any right to challenge and decision made by the Government to disclose the information.

Dated this _____ day of _____, 2015

(Name) _____

(Signature) _____

Duly authorized to sign tenders for and on behalf of:

(Firm) _____

(Address) _____



GOVERNMENT OF BERMUDA
Ministry of Health, Seniors and Environment
Department of Health Insurance

Overseas Case and Cost
Management

Request for Proposal