



Request for Proposals (RFP) International EOR

A. Introduction and Purpose

The Public Health Institute (PHI) is a global leader in public health, dedicated to promoting health, well-being, and quality of life for people around the world through innovative solutions and collaborative partnerships. Additional information regarding PHI, PHI's programs, and funders may be found at <https://www.phi.org/>.

PHI is seeking proposals in response to this RFP from qualified, global employers of record who are able to provide a full range of global employment solutions for our staffing and programs needs overseas. Through our awards with the US government as well as private donors, PHI regularly has a need to hire a range of positions from global health fellows to contractors to employees who are US Nationals (USNs), third country nationals (TCNs), or local country nationals (LCNs) in countries where PHI is not registered.

B. Scope of Work

For the past 50 years, PHI has long been recognized as a critical partner for its capacity to provide effective technical assistance and recruit global health professionals. PHI seeks global employer of record partners to enable PHI to legally engage one or more individuals in many countries simultaneously. These partners should be able to hire employees, onboard staff, and pay personnel salaries, taxes, and benefits in accordance with local employment laws. The geographic coverage includes Asia, Eurasia, Africa, Latin America, and the Middle East. , An **illustrative** list of countries includes:

Bangladesh, Brazil, Burma, Cambodia, China, D.R. Congo, Ethiopia, Honduras, Indonesia, Jordan, Kazakhstan, Kyrgyzstan, Kenya, Malawi, Mexico,-Mozambique, Namibia, Nigeria, Philippines, Tajikistan, Tanzania, Thailand, Turkey, Uganda, Ukraine, Uzbekistan, Vietnam, Zambia, and Zimbabwe¹.

PHI programs require employees across more than 40 countries, including several hard to operate locations. PHI has existing employment contracts and anticipates new contracts as well. PHI maintains the substantive working relationship, including recruitment, position duties, performance etc. Individuals will be the employees of the selected EOR. The selected EOR will be responsible for all statutory, human resources, and payroll requirements as dictated by the local labor laws in each country the employees engage.

The EOR should also be able to guide PHI in understanding the labor-related rules and regulations in every country and notify PHI of any upcoming changes, and be responsible for ensuring that the engagement of USNs, LCNs, and TCNs is compliant with local labor, tax, and/or related employment laws and regulations in each country.

¹ The total number of countries could change, and the list above is illustrative for RFP evaluation purposes only

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The EOR should be able to provide a range of services including:

I. Project Management Support:

- Analysis, reports, and consulting services with respect to country entrance and exit parameters;
- Anticipatory guidance on issues/needs based on each country's requirements;
- 24-hour operations support;
- Agile response to global shifting conditions
- Templates readily available for locally compliant employment contracts;
- A network of business contacts in each country that will be made available to PHI if needed
- Management of background checks (if required), work permits, and business visas;
- Cultural consulting (e.g. advice on interviewing laws, etiquette, language, diversity, salary scales, etc.);
- Recommendations on competitive benefits packages—which include legal, regulatory, and statutory requirements as well as benchmarking of international organizations and non-profits salaries in country;
- Host country staffing solutions and recruitment support;
- Expertise and knowledge of bilateral agreements/reciprocity, tax exemption processes, and ability to obtain employee exemptions where applicable;
- Paying TCNs in USD to an account outside of their work location;
- Providing comprehensive payroll and expense reimbursement systems that is audit accessible; and
- Other project management support, as necessary

II. Administration and Finance Support:

- Compliant on-boarding/off-boarding of TCNs and LCNs;
- Processing local payroll;
- Detailed payroll calculations including gross-to-net payroll calculations;
- Validating the integrity and reconciliation of the payrolls;
- Pay slip distribution;
- Local tax filings and payments with documentation of payments made to the government
- Submission of relevant reports to local authorities
- Production of bank and G/L files made available within 48 hours of any request to review the GL files.
- Fully consolidated financial statements
- Year-end filings and organizational financial audit reports.
- Documentation of Benefits compliance
- Other ad-hoc reports as necessary

In cases where the offeror does not directly provide a service outlined in the list above or in locations indicated above, offeror must indicate alternative solutions to offer those services to PHI.



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C. Eligibility

Minimum Requirements and Qualifications for Participation in the RFP Process

PHI will accept and evaluate proposals only from vendors which meet all the following criteria and requirements:

- 1.) Offer global employer of record services in Asia, Eurasia, Africa, Latin America, and the Middle East.
- 2.) Significant and demonstrable experience working with nonprofits and/or fiscal sponsors including working with US government funds (especially USAID and the CDC) and the cycle of government funding.
- 3.) Must not be listed as ineligible to receive federal funding on the following three websites:
 - a. System for Award Management (www.sam.gov)
 - b. Office of Foreign Assets Control (OFAC) Sanctions Lists, including the Specially Designated Nationals List (SDN) (<https://sanctionssearch.ofac.treas.gov/>); and
 - c. United Nations Security Council Consolidated Sanctions List (<https://www.un.org/sc/suborg/en/sanctions/un-sc-consolidated-list>).
- 4.) Professional English fluency for all staff who will interface with PHI.

D. Submission Requirements

The vendor's proposal must provide a detailed response and supporting documentation, where requested, to each of the following areas:

A. Cover page

- Please include the name of your organization, address, and contact information.
- Please include the name, title, and contact information for an authorizing official.

B. Table of Contents

C. Company Information and Past Experience

- Provide a summary of your firm and its culture and a description of key staff proposed to be assigned to PHI's account (brochures and marketing materials may be included as an appendix but should not take the place of a brief written response) and how PHI's account would be managed. Include a description of your experience and expertise serving clients in the non-profit arena and clients funded by the US government (especially USAID and/or CDC), and a summary of what differentiates your firm from your competitors.
- Indicate the primary physical location from which you will be providing your services.
- Provide a summary or sample timeline of your hiring/employment process once PHI has identified the LCN candidate (bidders may choose to use Kenya as a reference country/example).
- Indicate how many countries your firm can legally provide EOR services.
 - Provide a list of the current countries your firm can legally provide EOR services.
 - Provide a list of sanction countries where your firm currently does not and/or will not provide EOR services.

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- Provide a summary of your experience within the last 6 months providing international employment solutions in Africa, Asia Eurasia, Latin America, and the Middle East.
- Provide a description of the insurance coverage (non-benefit employee insurance) your company maintains for foreign employees (e.g., general liability, workers compensation, bereavement coverage, professional liability insurance, etc.).
- Provide a description of the techniques, approaches, strategies, and methods your firm uses, including any unique qualifications or capabilities with regards to the services outlined in Section B above where the funder is the US government or donor community.

D. Services Description

- What is included in your proposed EOR services?
- Are other services available a la carte? If so, please provide an overview.

E. Financial Capacity

- Provide a copy of your most recent audited financial statements as an annex to your proposal. Were there any findings? If so, please explain.
- Provide a summary of your firm's familiarity or experience with any of the following: Federal Acquisition Regulations (FAR), USAID Acquisition Regulations (AIDAR), 2 CFR Part 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, (5) Appendix II to Part 200 – Contract provisions for Non-Federal Entity Contracts Under Federal Awards, (6) 2 CFR Part 700 USAID Supplement to Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.

F. Fee Quotation

- Describe your proposed form of compensation for employer of record services (i.e., commission, annual retainer, and fee-for-service).
 - In developing the compensation quotation, bidders should assume the following²:
 - Using the spreadsheet we have provided as a sampling of countries for your proposal.
 - Minimum period of performance for each employee is 1 year
 - Gross annual payroll, fringe benefits, and local tax burden.
- Specify which services are included in this compensation and which services would require additional fees and/or be provided by a third party affiliate. Please provide as much detailed information as possible on any additional fees.

G. Credentials

- Provide a signed statement certifying bidder fully meets all minimum qualifications outlined in Section C, Eligibility.

H. References and Past Performance

- Provide references with contact information from a minimum of three clients who currently use bidder's EOR services. At least one of the clients must speak to the bidder's performance on federally funded programs.

² These figures have been provided for illustrative purposes only to ensure an equal cost evaluation across bidders.



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- Bidders may submit three written client testimonials in lieu of contact information for current clients. Testimonials must address the following topics related to the bidder's:
 - i. Customer Service
 - ii. Responsiveness
 - iii. Capacity
 - iv. Value on fee for service
 - v. Experience on federally funded programs

I. Sample Materials

- Include sample materials that are representative of the support you provide your clients.

E. Proposal Format

Proposals must be organized according to the submission requirements above. Proposals must address all of the requirements in Sections B and D. Excluding written testimonials, proposals must not exceed 10 pages, Arial or Gil Sans MT, size 11. Cover page, table of contents, financial statements, and sample materials are not included in the page limitation.

F. Submission of Proposals & Closing Time

Please submit proposals to: **Lauren Parks, Deputy Director of International Operations**
Public Health Institute
Email: lparks@phi.org

Questions are due by: January 10, 2022

Proposals are due by: January 17, 2022
11:59 PM – Pacific Standard Time (PT)

- Proposals must be submitted via email by the date and time specified above.

G. Timeline and Evaluation

Timeline: PHI intends to hire 1-2 EORs in the first quarter of 2022.

Proposal Evaluation

PHI is committed to a transparent process of award and selection of an international EOR with the intention to secure the best possible solution(s) for PHI's emerging needs while ensuring an optimal financial and operational outcome and the best value to our funders.

An evaluation team will review, in detail, all proposals received to determine the best value. Following the initial review and screening of the written proposals, using the selection criteria described below, bidder(s) will be invited to participate in the final selection process, which may include participation in an interview and or submission of any additional written information as requested by PHI.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI to determine the best value. A bidder can receive a maximum of 100pts:



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- A) Company Information and Past Experience (20%)
- B) EOR Service Country Presence: Including which Countries Offer EOR Services and Number of Countries Offer PEO Services (15%)
- C) Services (10%)
- D) Financial Capacity (15%)
- E) Fees (30%)
- F) Credentials (5%)
- G) References (5%)

H. Solicitation Terms

1. Agreement

Subject to availability of funding, PHI intends to issue a 12-month agreement, for guaranteed up to 18 months pending additional government contracting to the successful bidder from this procurement process. PHI reserves the right to issue one or more awards as a result of this RFP.

2. Discretion

PHI may, at its sole discretion and after the evaluation process, choose not to issue any agreement as a result of this process. PHI may also, at its sole discretion, choose to issue as many or as few agreements as deemed necessary to meet PHI's business needs.

3. Offers/Proposals

Prices must be inclusive of all costs, including taxes and fees, in US Dollars. Quotes and prices should remain valid for ninety (90) calendar days from proposal submission.

4. Quotation of Costs

There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.