

**REQUEST FOR PROPOSALS (RFP):  
INTERNATIONAL PROFESSIONAL EMPLOYER ORGANIZATION (PEO)**

**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 firms 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 fellows to contractors to employees who are third country nationals (TCNs) and cooperating country nationals (CCNs) in countries where PHI is not registered.

**B. Scope of Work**

PHI works closely with the US government and private donors to increase the capacity of public health providers and institutions overseas and improve the global health workforce. For the past 50 years, PHI has long been recognized as a critical partner for emerging global health leaders and for our capacity to provide effective technical assistance and recruit niche and entry level global health professionals at a moment's notice. To this end, PHI is officially registered in three countries: South Africa, India, and Brazil; however, the needs of our programs now surpass our current institutional capacity to quickly hire staff in numerous countries around the world.

PHI needs a global professional employer organization (PEO) partner that enables PHI to legally engage one or more individuals in many countries throughout the developing world, sometimes simultaneously. From a legal, HR, and tax perspective, this partner should bring the capacity to hire employees, onboard staff, or pay personnel in local currency in Asia, Africa, Latin America, and the Middle East, including, but not limited to all or most of the following **illustrative** countries:

Afghanistan, Bangladesh, Burma, Cambodia, China, D.R. Congo, Ethiopia, Indonesia, Jordan, Kazakhstan, Kyrgyzstan, Kenya, Malawi, Mozambique, Nigeria, Pakistan, Philippines, Tajikistan, Tanzania, Thailand, Uganda, Ukraine, Uzbekistan, Vietnam, Zambia, and Zimbabwe<sup>1</sup>.

The employees will be managed by PHI on a day to day basis, where PHI maintains the substantive working relationship, makes all decisions on compensation, position duties, performance etc. but legally the individual(s) will be the employees of the selected bidder. The selected bidder will be responsible for all statutory, human resources, and payroll requirements as dictated by the local labor laws in each country for which PHI has a need to hire an employee, contractor, fellow, intern, or grantee.

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<sup>1</sup> The total number of countries could change and the list above is illustrative for RFP evaluation purposes only

Applicants should also be able to guide PHI in understanding the labor-related rules and regulations in every country and any upcoming changes, while being simultaneously responsible for ensuring that the engagement of CCNs and TCNs is compliant with local labor, tax, and related laws and regulations in each country. The applicant should be able to provide a range of international PEO and employer of record 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
- Around the clock operations support
- Troubleshooting
- 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
- Assistance with background checks, 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 what other international organizations and non-profits are offering in country
- Strategic guidance and support regarding legal and compliance requirements to register a new entity in a country and/or maintain compliance with existing registrations in a country
- Host country staffing solutions and recruitment support
- Other project management support, as necessary

**II. Administration and Finance Support:**

- Compliant on-boarding/off-boarding of TCNs and CCNs
- 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
- Submitting reports to local authorities
- Production of bank and G/L files
- Fully consolidated financial reporting
- Year-end filings
- Benefits compliance
- Other as necessary

In cases where the offeror does not directly provide a service outlined in the list above, offeror must indicate how they plan to offer those services to PHI.

## C. Eligibility

### Minimum Requirements and Qualifications for Participation in the RFP Process

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

- 1.) Offer global employer of record services in Asia, Africa, Latin America, and the Middle East.
- 2.) Significant experience working with nonprofits and/or fiscal sponsors. Additionally, PHI would consider it a plus if bidder's portfolio of experience includes working with US government funds (especially USAID and the CDC) and the cycle of government funding. This is not a requirement for participation in the proposal process but will be a factor in PHI's evaluation.
- 3.) Must not be listed as ineligible to receive federal funding on the following three websites:
  - a. System for Award Management ([www.sam.gov](http://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 bidder'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 CCN candidate (bidders may choose to use Kenya as a reference country/example).
- Indicate how many countries your firm can legally provide PEO services.
  - Provide a list of the current countries your firm can legally provide PEO services.

- Provide a list of sanction countries where your firm currently does not and/or will not provide PEO services.
- Provide a summary of your experience within the last 12 months providing international employment solutions in Africa, Asia, 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 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 PEO services proposal?
- 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: 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 Proposal**

- Describe your proposed form of compensation for employer of record services (i.e., commission, annual retainer, fee-for-service).
  - In developing the compensation proposal, bidders should assume the following<sup>2</sup>:
    - Approximately 200 employees over a 5 year period
    - Each country has no more than 3 employees
    - Approximately 30 countries
    - Minimum period of performance for each employee is 1 year
    - Gross annual payroll of \$5,000,000 over a 5 year period (includes fringe benefits)
- 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**

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

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

In order for PHI to conduct the most efficient proposal evaluation, bidders are required to organize their proposals as noted below:

- A. Cover Page**
- B. Table of Contents**
- C. Company Information and Past Experience**
- D. Services Description**
- E. Financial Capacity**
- F. Fee Proposal**
- G. Credentials**
- H. References**
- I. Sample Materials**

Proposals must be organized according to the submission requirements and proposal format above. Proposals must address all of the requirements in Sections B and D. Proposals must not exceed 20 pages, Times New Roman Font, size 12. Cover page, table of contents, financial statements, and sample materials are not included in the page limitation.

Proposals which fail to address each of the submission requirements above may be deemed non-responsive and will not be further considered. Note that responses to RFP requirements must be specifically answered within the context of the submitted proposal. PHI's evaluation team will not refer to a designated website, brochure or other location for the requested information. Responses that use references to external materials as an answer will be considered non-responsive.

## **F. Submission of Proposals & Closing Time**

Please submit proposals to: **Crystal Flexman, Special Project Manager**  
Public Health Institute  
1825 Bell Street, Suite 102  
Sacramento, CA 95825  
Email: [crystal.flexman@phi.org](mailto:crystal.flexman@phi.org)

Proposals are due by: **August 22, 2018**  
12:00 PM – Pacific Standard Time (PT)

- Proposals must be submitted via email by the date and time specified above. Bidders are permitted, but not required to submit hard copy proposals in addition to an electronic submission. Hard copy proposals must arrive within two business days of the proposal due date.
- PHI encourages inquiries concerning this RFP. All questions pertaining to this RFP must be made via email to [crystal.flexman@phi.org](mailto:crystal.flexman@phi.org). Questions are due by 9:00 AM PT, **Friday August 3, 2018**.
- Bidders should retain a copy of their application and accompanying enclosures for their records.

## **G. Proposal Timeline and Evaluation**

### **1. Proposal Timeline**

PHI intends to follow the below timeline for review and award of this solicitation:

- Questions Due: August 3, 2018 9:00 AM (PT)
- Deadline for Submittal: August 22, 2018 12:00 PM (PT)
- Review of Proposals: August 27- September 7, 2018
- Interviews or Additional Questions Conducted: September 10-14, 2018
- International PEO Selected: September 17-28, 2018

### **2. Proposal Evaluation**

PHI is committed to a transparent process of award and selection of an international PEO with the intention to secure the best possible solution(s) for PHI's ongoing 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 oral 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:

- A) Company Information and Past Experience (20%)
- B) PEO Service Country Presence: Including which Countries Offer PEO Services and Number of Countries Offer PEO Services (15%)
- C) Services (10%)
- D) Financial Capacity (5%)
- E) Fees (40%)
- F) Credentials (5%)
- G) References (5%)

## **H. Solicitation Terms**

### **1. Agreement**

Subject to availability of funding, PHI intends to issue an exclusive cost reimbursable type agreement for a base period of up to five (5) years 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/Quotations**

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. Proposal 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.