



Request for Proposal (RFP)

Amendment #1

(Changes are marked in red)

Commodity/Service Required:	Global Employer of Record (EOR) Services
Type of Procurement:	Master Service Agreement
Type of Contract:	Fixed Unit Price
Term of Contract:	24 Months with 1 year renewal option subject to performance
Contract Funding:	Primarily USAID and other US Government Funding, though may include other client-funded projects
This Procurement supports:	Multiple Projects in RTI's International Development Group
Submit Proposal to:	Barbara Herrera (bherrera@rti.org)
Date of Issue of RFP:	March 18, 2024
Date Questions from Supplier Due:	April 1, 2024
Date Proposal Due:	May 6, 2024
Approximate Date Master Service Agreement is Issued to Successful Bidder(s):	July 1, 2024

Method of Submittal: Respond via e-mail with attached document in MS Word / PDF format. Please include the solicitation number in the subject line of all e-mail correspondence.

Firm Price: The Bidder/Seller agrees to hold the prices in its offer firm for **90 days** from the date specified for the receipt of offers, unless another time is specified in the addendum of the RFP/RFQ.

Solicitation Number: RTI IDG – RFP - 2024 - 002

Attachments to RFP:

1. Attachment A – Scope of Work
2. Attachment B – Sample Staffing Schedules
3. Attachment C – Instructions to Bidders/Sellers
4. **Attachment D – Questions and Answers**
5. All PO Terms and Conditions are listed on our website at:
http://www.rti.org/files/PO_FAR_Clauses.pdf or for commercial items:
http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf (hereinafter the “Terms”).

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



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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 for carefully reviewing each attachment and following all relevant instructions.

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

Attachment A Statement of Work

Background: Founded in 1958, RTI International seeks to improve the human condition by addressing the world's most critical problems with science-based solutions in pursuit of a better future. RTI partners with the US Government (“USG”) and other clients to achieve this mission.

RTI International seeks a vendor(s) or supplier(s) (“Supplier” as referenced throughout) who can provide employer of record (EOR) services in multiple countries for USG funded projects, mainly the US Agency for International Development (“USAID”), as well as other client-funded projects.

The number of countries where RTI may require EOR services, the number of staff to be hired, and the duration for which services will be needed are expected to vary at any given time depending on programmatic and operational needs.

RTI is primarily seeking the following services:

- Market-based wage and labor classification.
- Hiring of staff using local, legally compliant contracting requirements.
- Payroll processing inclusive of compliant tax and other payroll withholdings and prompt payment to local revenue and other authorities.
- HR benefits management including vacation, holiday or sick leave (if that service is provided by the EOR)/pay; health insurance, workers’ compensation insurance, and/or general liability insurance; and other benefits as required by local labor law and RTI policy.
- Fast and effective responses to any issues, changes and challenges that may arise from local authorities or clients relating to any of the above.

Depending on the services and countries the Supplier is contracted for, the country location, project, and staffing needs, additional services may be requested, such as:

- Support in obtaining work visas/permits for staff.
- Guidance on employment, labor laws and practices in country (Country Profile Information) so that RTI, independently or with the Supplier’s assistance, can appropriately budget proposals, prepare employment agreements, and develop employee handbooks.

Duration of MSA: The duration of the Master Service Agreement will be 24 months for services with a possible 12-month extension. Note, while the global EOR supplier may be retained for 24 months, each purchase order will have its own period of performance. It is anticipated that individual purchase orders for country engagements would be approximately 6 months, although the duration may be shorter or longer depending on individual project and country needs. A sample staffing

schedule is available in **Attachment B**.

I. EOR Service Expectations

The EOR(s) will **not** be responsible for the recruitment of any employees. RTI will handle all recruitment efforts, but the EOR(s) will be responsible for providing market-based wage and labor classification advice as needed.

Most of RTI's employment agreements are in local currency. Payments to the selected Supplier will be made from RTI's home office in **US Dollar (USD)**. Monthly conversion to local currency from USD should use exchange rates that are verifiable, documented and widely known (such as Oanda). Support for exchange rates used will be required monthly.

The exact needs of each task order may vary, but the selected Supplier will be responsible for the following services for the majority of task orders under the awarded master services agreement:

1. Serving as the employer of record for one or more project staff during the contracted period of performance listed in the applicable Purchase Order.
 - Making timely payroll payments, statutory deductions and payments to tax authorities in line with local requirements.
 - Providing all employer services and administering locally required benefits in accordance with local labor laws and RTI standard benefits.
Paying any necessary associated expenses related to the employee's agreement for the duration agreed upon for the project's needs, which may include direct expense reimbursement.
2. Serving as the HR coordinator for RTI by managing personnel, specifically in the following areas:
 - Onboarding and providing orientation to the new hires. This will include reviewing all legal provisions in line with local labor law for workplace compliance, and explanation of the HR administration and separation processes.
 - Ensuring that the necessary health and any other required insurance coverage is in place for all employees.
 - Promoting workplace safety among staff and providing advice and assistance on related issues.
 - Engaging with RTI to manage staff, ensure compliance, take corrective and disciplinary measures, as well as handle separations, offboarding, or terminations of employment contracts in accordance with directives from RTI and in line with local labor and other legal requirements.
 - Ensuring that all recommended actions align with labor laws, including providing proper notifications in cases of employment termination.
 - Tracking/updating the project Staff Census with a focus on managing employee payroll, benefits, and taxes schemes.
3. Providing labor market guidance including:
 - Providing labor law and market-based wage and labor classification

- advice as needed.
 - Providing a list of benefits offered in addition to salary remuneration, to include paid time off, bonuses, health benefits (where applicable), severance, insurance, training, and any other statutory requirements, and employee benefits.
4. Ensuring ongoing compliance with HR policies and local labor laws and promptly communicating any changes in writing to RTI and the employee (i.e., new holiday, new tax withholding requirements, etc.).

A. EOR Administrative Expectations

1. The successful offeror(s) will be expected to demonstrate the ability to adhere to any RTI client registration requirements as well as to legally operate in countries where their services will be required. This includes, at a minimum, the ability to provide:
- Tax certificate
 - Proof of country registration
 - Proof of authorization to provide EOR or similar services in these countries.
 - Any other client-required information, such as unique entity identifier number, etc.
2. The following requirements must also be met:
- Maintaining HR (including non-personnel) files. This includes: **if this service is provided by the EOR Bidder** - tracking and compiling the project employee leave schedules, setting up all staff absence by receiving and filing leave authorizations, performing the functions of absence monitoring and recording; advising employees on their leave entitlements. **If your company does not provide leave tracking, please note this in your proposal.**
 - Utilizing established systems for expense reporting, that can provide RTI with employees' signed timesheets, can track employee labor against multiple different project charge codes, and that segregate employee related costs from EOR fees. Note that EOR invoicing should be broken down by the project charge codes supplied by RTI for each employee and must be provided monthly to RTI.
 - Maintaining confidentiality of all HR documents during and after contract has been terminated. Maintaining robust information and data security systems and practices that protect against unauthorized access. The EOR will also ensure that all employees are fully aware of the risks associated with information and data security issues.

B. EOR Services Monthly Deliverable Requirements

1. Monthly expected deliverables for the EOR services provided include:
- Monthly timesheets completed in line with USAID or client regulation and RTI policy (e.g., signed by employee and supervisor), with copies submitted to the project in an agreed-upon format which includes

number of hours worked and the RTI project codes. Copies of timesheets must be submitted with invoices.

- Detailed invoice and monthly HR summary report, including any project-specific information to RTI Management, as negotiated.
- Supporting documentation for the invoices must include the following:
 - Employee name
 - Total hours worked by the employee
 - Allows for the use of different charge codes by one employee (e.g., 4 hours to 123000 and 4 hours to 123001)
 - Signature from both employee and supervisor
 - Itemized benefits payments, and supporting evidence of payroll tax and social security/pension submissions as applicable.

II. Other Services

The Other Services listed below are optional, and suppliers may choose to bid on the following if interested.

A. Provision of Work Visa/Permits for International Staff

1. At RTI's request, Supplier shall provide support obtaining the necessary local work permit/visa for international staff. Staff may be US Nationals or with other home countries.
2. Supplier will provide information about the cost of the service and anticipated timeline to secure the visa/permit for the country and individual. Securing the visa/permit would come after RTI project team agreement.
3. RTI may request this support for countries in which the Supplier is not being used as an EOR.
4. **Deliverables for Work Visa/Permits for International Staff** – Supplier would provide weekly updates to RTI project team about progress on obtaining the necessary documentation for the individuals to work legally in the selected country. Invoicing for the work permits/visas would be separate from charges for the provision of employment services, and would reference the relevant RTI project code.

B. Provision of Country Profile Information

1. As part of RTI's proposal process for business development, RTI may need detailed information about employment practices and labor laws in various countries. If Country Profile information is provided by your firm, RTI may be interested in this information from time to time for a variety of countries. This information would be used by RTI to appropriately budget proposals, prepare employment agreements, and employee handbooks for each country. RTI may request this information without moving forward on using the Supplier as an EOR in a specific country.
2. **Deliverables for Country Profile Information** – Country Profiles provided upon request within an agreed-upon timeline on an ad-hoc basis.

III. Proposal Requirements

Interested Suppliers are required to provide bids that respond to the EOR Services (Section I EOR Service Expectations and subsections above). ***Separately, the services described under item II. Other Services are optional. If a supplier responds to either of the items under Section II. Other Services, please follow the instructions below.***

Offeror, please provide information for your choice of two of the following sample countries – these are: Vietnam, Maldives, Ghana, Malawi, Canada, and Brazil. Please use the same 2 countries for all information requested for the exemplar countries below. If your company does not support activities in 2 of the listed countries, you can select 2 other countries for your proposal, assuming the same base salary information.

A. Technical Proposal Requirements:

1. EOR Services

In 10 pages or less, please describe your approach to providing EOR services. Please include the following:

- a) General information:
 - a. Country List- Provide a full list of countries where your firm operates, including operating status.
 - i. **Supplier must specify whether Supplier operates directly or through an affiliate, subcontractor, or subsidiary, and specify the relationship with the partner organization. Please see response to Question #12 in the Question and Answers, Attachment D for a more detailed listing of the requirements regarding partnerships, affiliates, and subcontracting.**
 - ii. If your company operates using a tiered system, please indicate which countries are in which tiers.
 - b. Describe your company's approach to data security, and explain how you make reasonable efforts to restrict unauthorized access and best endeavor to ensure that employees are fully aware of the risks associated with information and data security issues.
 - c. Include appropriate documentation showing your company is registered within authorized geographical code of 937 (United States of America and developing countries other than advanced developing countries, and excluding prohibited sources).
- b) Select 2 of the exemplar countries and provide the following for each country:
 - a. Summarize the approach to providing EOR services by supporting RTI as an EOR in multiple countries and describe how the expectations outlined in the Service Expectations in Section II.A above would be met. Please include information on the following:

- i. Describe the documents and timeline required from when selected individuals/names with salary grade and compensation information is shared from RTI to when staff can begin working in the 2 exemplar countries selected from the list above. (Note RTI will complete the recruitment, background check, and salary negotiations for each staff member). You can share a range and average duration for other countries where your company works. Please also discuss any impact on the lead time for countries where you may be operating as a registered provider of services as opposed to countries where you may be working through an affiliate or contractor.
- ii. Provide a sample invoice showing how invoices would be submitted to RTI with information about specific projects. Invoices should include subtotals per project (inclusive of project related taxes and fees). Invoices should be supported with timesheets (please include a sample employee timesheet) that shows the following:
 1. Employee name
 2. Total hours worked by the employee
 3. Allows for the use of different charge codes by one employee (e.g., 4 hours to 123000 and 4 hours to 123001)
 4. Ensures employee and supervisor both sign the timesheet
 5. Itemized benefits payments, and supporting evidence of payroll tax and social security/pension submissions as applicable.
- iii. Describe the process for administering benefits in accordance with local labor laws and application of statutory deductions, and timely payments to tax authorities and employees. Include a summary of how any identified errors are corrected.
 1. Please note, it is preferred that the selected Supplier provide health benefits. Please clearly indicate if health insurance benefits are included, and if RTI could select health benefits that could be provided through your company.
- iv. Describe the notice period and process for terminating the EOR support in the selected exemplar country.
- v. Describe the approach for data security with reasonable efforts to restrict unauthorized access and will make best endeavors to ensure that employees are fully aware of the risks associated with information and data security issues.
- vi. Include appropriate documentation showing Supplier is registered within authorized geographical code of 937 (United States of America and developing countries other than advanced developing countries, and excluding prohibited sources).
- vii. For 2 of the example countries listed above, please provide the following documents:
 1. Tax certificate

2. Proof of registration.
3. Demonstrate authorization to provide EOR or similar services in these countries.
4. Any other locally-required information, such as unique entity identifier number, etc.

2. Work Visa/Permit for International Staff

In 2 pages or less, please describe your approach to obtaining work permits and visas. Please include the following:

- Range of time estimated to obtain the necessary work permit/visas in 2 of the example countries listed above for US Nationals or other international staff (third country nationals).
- Ability to work through USG channels to obtain work permit/visas, as well as other channels if necessitated by the funding client.
- Past experience obtaining work permits/visas for US Nationals and other international staff in the exemplar countries.

3. Country Profile Information

In 2 pages or less, please describe how the Country Profile information is prepared, updated, and supported:

- Summarize the information included in each Country Profile (e.g., contract information, leave (if applicable/provided by the EOR Supplier), holidays, pension, etc.) and level of detail provided in the profile.
- Describe how the information is collected for the Country Profiles – for example, is local legal counsel consulted, do they review the profiles, is information pulled from websites or other media (e.g., newspapers).
- Share the frequency with which data in the country profiles updated, and information about how updates are communicated out to clients such as RTI.
- Explain what happens if an employee questions or pushes back on information provided in a country profile. Please describe how this is managed, and if the Supplier would provide RTI with support navigating the responses, both through official communications and through legal means if the situation escalated.
- Include the turnaround time to provide RTI with a Country Profile upon request.

4. Additional Supplier Company Information

In 5 pages or less, please provide the following information about your company:

- Company's profile/overview and a list of board members and or trustees and CVs for key staff members.
- Past performance information to demonstrate capabilities and technical experience, 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). **More specifically:**
 - Provide a table/list which includes at least the following information over the period of the past 3 years: the countries in which the bidder performed, the number of staff that the bidder supported in those countries, and the type of support services provided. Listing the

former/current client name(s) associated with each contract or activity is optional.

- Provide at least 3 references from current or past clients that the bidder was an EOR provider for in the past 3 years. References may be in the form of a letter and signed by an authorized agent of the referring company, or the referring company's contact information may be provided by the bidder authorizing RTI to contact the company directly.
- Survey results that redact client identifying information may also be included in addition to the requests above.

B. Cost Proposal Requirements

The Supplier shall develop and submit cost/pricing information in accordance with the following descriptions and instructions. The cost proposal must be presented in USD, though as noted in the Service Expectations section above, most employment contracts are in local currency. Please note if there are any volume discounts offered for services:

1. Employee and Payroll Costs

Please provide a summary of fees for hiring staff – including any volume discounts if applicable. Please differentiate between VAT, local taxes/withholding, and fees for services provided by your company. If your pricing model differs by individual country, please fill out Table A for each of the each of the two exemplar countries you chose for the technical proposal requirements. If your pricing model is associated with a tiering structure where you apply different costs to different groups of countries, please fill out Table B for each group i.e. tier of countries and indicate the countries included in that tier. Fees should be organized as follows:

- **Employee salary** – For the purposes of comparison, please use the following staff/salary sample for a small project with 10 staff and a total monthly salary (without taxes) of \$60,500. For the purposes of comparison, benefits are 30% and included as a separate line item. This information has been provided in the tables below as a basis for your calculations. If your company provides volume discounts on fees related to the total number of hires, please provide a summary of the fee structure in the appropriate section of the table.
- **Fixed Rate (percentage of salary cost or cost/employee) per Month.** The Fixed Monthly Billing Rate should be billed monthly for providing the employer of record services for RTI International. This fixed rate and associated costs for benefits and any other expenses incurred will be submitted and reimbursed on a monthly basis.
- **Pricing proposal template.** The supplier can present their pricing proposal as shown in the pricing template below or simply indicate what their Fixed Rate will be per month for 10 employees in one of the example countries. Include anticipated costs for benefits that will be direct billed.
 - Please also indicate any volume discounts for number of staff hired and required duration, as well as any guarantee for number of hires and duration RTI would need to provide to meet the

volume discount.

- **Simulation** of fee calculation. If Supplier charges an early termination fee, please include in the pricing table. If no early termination fee applies, please confirm in your cost proposal.

Table A. Pricing table for staff employment cost and fees. Please complete one table for each of the 2 chosen sample countries. Please add rows as needed to itemize costs.

Country Name:					
Item #	Quantity	Description	Unit of Measure	Unit Price	Total Price
1	10 employee salaries	Employee salaries 1. Chief of Party - \$10,000/mo 2. Finance/Operations Manager - \$8,000/mo 3. Senior Technical Advisor - \$9,000/mo 4. Activity Manager - \$7,500/mo 5. Activity Coordinator 1 - \$5,000/mo 6. Activity Coordinator 2 - \$5,000/mo 7. HR Coordinator - \$5,000/mo 8. Accountant - \$5,000/mo 9. Activity Assistant - \$3,000/mo 10. Office Assistant - \$3,000/mo Benefits - 30% Total Salary/Benefits - \$78,650	month	\$60,500	\$60,500
	Benefits for 10 employees	Benefits - 30%	month	\$18,150	\$18,150
2	10 employees	EOR Fee	month	XX %	XX % of total payment to the employee

3		Any other costs/local taxes			
4		Any other costs/local taxes			
5		VAT (if any)		XX %	
6		Fees			
Volume discount (if applicable) – noting minimums if required.					
Total Value					

Table B. Pricing table for staff employment cost and fees under a tiered pricing model. Please include information for the example countries selected above. Please add rows as needed to itemize costs.

TIER 1						
Countries in Pricing Tier (list all countries in this tier below – highlight the country selected for costing from the exemplar country options)	Item #	Quantity	Description	Unit of Measure	Unit Price	Total Price
	1	10 employee salaries	Employee salaries 1. Chief of Party – \$10,000/mo 2. Finance/Operations Manager - \$8,000/mo 3. Senior Technical Advisor - \$9,000/mo 4. Activity Manager - \$7,500/mo 5. Activity Coordinator 1 - \$5,000/mo 6. Activity Coordinator 2 - \$5,000/mo 7. HR Coordinator -		\$60,500	\$60,500

			\$5,000/mo 8. Accountant - \$5,000/mo 9. Activity Assistant - \$3,000/mo 10. Office Assistant - \$3,000/mo			
			Benefits	month	\$18,150	\$18,150
	2	10 employees	EOR Fee	month	XX %	XX % of total payment to the employee
	3		Any other costs/local taxes			
	4		Any other costs/local taxes			
	5		VAT (if any)		XX %	
	6		Any other fees			
Volume discount (if applicable) – noting minimums if required.						
Total Value						
TIER 2						
Countries in Pricing Tier (list all countries in this tier below – highlight the country selected for costing from the exemplar country options)	Item #	Quantity to be Purchased	Description of Preferred Commodity or Services Specifications	Unit of Measure	Unit Fixed Price (Each)	Total Fixed Price (Each)
	1	10 employee salaries	Employee salaries 1. Chief of Party – \$10,000/mo 2. Finance/Operations		\$60,500	\$60,500

			Manager - \$8,000/mo 3. Senior Technical Advisor - \$9,000/mo 4. Activity Manager - \$7,500/mo 5. Activity Coordinator 1 - \$5,000/mo 6. Activity Coordinator 2 - \$5,000/mo 7. HR Coordinator - \$5,000/mo 8. Accountant - \$5,000/mo 9. Activity Assistant - \$3,000/mo 10. Office Assistant - \$3,000/mo			
	2		Benefits	month	\$18,150	\$18,150
	3	10 employees	EOR Fee	month	XX %	XX % of total payment to the employee
	4		Any other costs/local taxes			
	5		Any other costs/local taxes			
	6		VAT (if any)		XX %	
	7		Any other fees			
	Volume discount (if applicable) – noting minimums if required.					
	Total Value					
TIER 3						
Countries in Pricing Tier (list all countries in this tier below-highlight the country selected for	Item #	Quantity to be Purchased	Description of Preferred Commodity or Services Specifications	Unit of Measure	Unit Price	Total Price

costing from the exemplar country options)						
	1	10 employee salaries	Employee salaries 1. Chief of Party - \$10,000/mo 2. Finance/Operations Manager - \$8,000/mo 3. Senior Technical Advisor - \$9,000/mo 4. Activity Manager - \$7,500/mo 5. Activity Coordinator 1 - \$5,000/mo 6. Activity Coordinator 2 - \$5,000/mo 7. HR Coordinator - \$5,000/mo 8. Accountant - \$5,000/mo 9. Activity Assistant - \$3,000/mo 10. Office Assistant - \$3,000/mo	month	\$60,500	\$60,500
	2	10 employee benefits	Benefits	month	\$18,150	\$18,150
	3	10 employees	EOR Fee	month	XX %	XX % of total payment to the employee
	4		Any other costs/local taxes			
	5		Any other costs/local taxes			
	56		VAT (if any)		XX %	
	7		Any other fees			
	Volume discount (if applicable) – noting minimums if required.					
	Total Value					

Table C. Pricing table for work permit/visa support. Please add rows as needed to itemize costs. If Supplier chooses not to bid on this area of work, please include N/A in your proposal.

Item #	Quantity	Description	Unit of Measure	Unit Fixed Price (Each)	Total Price
1		Work permit fee for X country for Name/Title	One work permit		XX % of total payment to the employee
2		Visa fee			
3		Any other costs (e.g., Supplier service charges)			
4		Tax/VAT (if any)		XX %	XX % of total payment to the employee
Total Value					

Table D. Pricing table for Country Profiles. Please add rows as needed to itemize costs (e.g., taxes, etc.) If information is provided free of charge (e.g., available on the Supplier’s website), or if Supplier chooses not to bid on this area of work, please include N/A in your proposal.

Item #	Quantity	Description	Unit of Measure	Unit Fixed Price (Each)	Total Price
1	Up to X country profiles	EOR Fee	Country Profile	XX %	
2	Up to Y country profiles	EOR Fee	Country Profile	XX %	
3		Tax/VAT (if any)			
Total Value					

By signing this Attachment, the Supplier confirms a complete understanding of the Statement of Work/specifications and fully intends to deliver the items or services that comply with the above listed Statement of Work/specifications.

Signature:

Title:

Date:

Attachment B – Sample Staffing Schedules

Table E. Sample Staffing Schedule – Large Project

Title	Salary Grade	Annual Budgeted Salary (USD)	Anticipated Start Date
Hired at the time of EOR onboarding			
Chief of Party	G/13	\$170,000.00	06/01/2024
Finance Manager	K/9	\$48,000.00	06/01/2024
Driver x3	R/4	\$24,000.00	06/01/2024
MEL Director	I/11	\$89,025.00	06/01/2024
Database Manager	K/9	\$48,000.00	06/01/2024
Sr. Finance and Operations Director	I/11	\$108,000.00	06/01/2024
Procurement Manager	K/9	\$48,000.00	06/01/2024
Security Manager	J/10	\$48,000.00	06/01/2024
Human Resources Manager	J/10	\$48,000.00	06/01/2024
IT Manager	L/8	\$42,000.00	06/01/2024
IT Assistant	O/6	\$24,000.00	06/01/2024
Administrative Assistant	Q/5 or O/6	\$24,000.00	06/01/2024
Administrative Assistant	Q/5 or O/6	\$24,000.00	06/01/2024
Deputy Chief of Party	H/12	\$140,000.00	06/01/2024
MEL Officer	M/7	\$30,000.00	06/01/2024
MEL Officer	M/7	\$30,000.00	06/1/2024
Communications & Digital Media Specialist	K/9	\$71,436.00	06/1/2024
Finance Officer	L/8	\$30,000.00	06/01/2024
Procurement Officer	O/6	\$30,000.00	06/01/2024
Human Resources Assistant	O/6	\$24,000.00	06/01/2024
Accountant	O/6	\$18,000.00	7/1/2024

Program Implementation Director	I/11	\$89,025.00	8/1/2024
Program Manager, Low Cost Private School	L/8	\$48,000.00	7/1/2024
Data Analyst	M/7	\$31,200.00	7/1/2024
Communications Assistant	O/6	\$24,000.00	7/1/2024
Subawards & Grants Manager	K/9	\$48,000.00	7/1/2024
Security & Logistics Officer	O/6	\$30,000.00	7/1/2024
Program Manager	L/8	\$48,000.00	8/1/2024
Senior Literacy Specialist	J/10	\$89,025.00	8/1/2024
Systems Strengthening Specialist	J/10	\$89,025.00	8/1/2024
French Literacy Specialist	K/9	\$71,436.00	8/1/2024
Math Specialist	K/9	\$71,436.00	8/1/2024
Regional Manager	K/9	\$36,000.00	8/1/2024
Program Officer, Literacy	M/7	\$30,000.00	8/1/2024
Program Officer, Math	M/7	\$30,000.00	8/1/2024

***Conditional and subject to change throughout the period of performance**

Table F. Sample Staffing Schedule – Medium size project

Title	Salary Grade	Annual Budgeted Salary (USD)	Anticipated Start Date
Communications Specialist 3	K	\$26,095.32	08/15/2024
Finance & Grants Manager 2	I	\$46,681.56	08/01/2024
Senior Technical Advisor 2	I	\$37,380.60	08/01/2024
Chief of Party 2	G	\$83,000.04	08/01/2024
Program Specialist 1 x2	M	\$13,500.84	08/15/2024
Technical Advisor 3	K	\$28,897.32	08/01/2024
Monitoring & Evaluation Specialist 3 x2	K	\$16,305.12	08/30/2024
Senior Administrative Assistant 1	O	\$13,200.00	08/10/2024
Program Specialist 3	K	\$22,927.44	08/30/2024
Program Specialist 3	K	\$23,696.64	08/30/2024
Senior Program Specialist 2	I	\$28,247.40	08/30/2024
Finance & Administration Assistant x2	O	\$15,600.00	08/25/2024
Procurement & Logistics Specialist 3	K	\$36,000.00	08/10/2024
Senior Program Specialist 1	J	\$22,419.48	08/15/2024

Senior Technical Advisor 2	I	\$38,550.96	08/10/2024
Program Coordinator 2 x2	L	\$21,240.00	08/25/2024

Attachment C

Instructions to Suppliers

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. RTI reserves the right to award to more than one supplier. If an Ordering Agreement is established as a result of this RFQ/RFP, supplier understands that description 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

3040 East Cornwallis Road
P.O. Box 12194
Research Triangle Park, NC 27709-2194

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

US Government (mainly USAID), as well as other client-funded projects

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 legal business name, address, and telephone number of the supplier (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 applicable - 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) If applicable - 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). **Please review detailed requirements in Attachment A, Page 9.**
 - (m) Sample timesheets, **documentation required by the Supplier in the course of business (such as questionnaires)** and other documentation as requested in this RFP that will be used between the EOR supplier and employees to be under contract.
 - (n) Example employment contract to be used between the EOR and employees to be under contract, if applicable.
 - (o) Unique Entity Identifier number (UEI), created on SAM.gov. If not currently available, Supplier may register and must show proof of registration at the time of submitting the proposal.
 - (p) **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 suppliers) must record their pricing utilizing the format found on Attachment A. Sellers must sign in the signature lines of Attachment A and Attachment C, and

send the complete signed RFQ to the email address listed on the cover page.

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

Barbara Herrera

(insert name of procurement officer)

at this email address:

bherrera@rti.org

(insert email address of the procurement officer).

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

April 1, 2024

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 of 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 (e.g., manuals, warranty doc, certificate of analysis, timesheets, etc.)
8. **Payment Terms:** Refer to RTI purchase order terms and conditions found in 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 Supplier 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 all considered important elements 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.

The evaluation factors will be comprised of the following criteria:

- a. **PRICE (25 points)** Lowest evaluated ceiling price.
- b. **DELIVERY (20 points)**. Seller provides the most advantageous delivery schedule.
- c. **TECHNICAL (25 points)**. Items/Services shall satisfy or exceed the specifications described in RFQ/RFP Attachment A.
- d. **PAST PERFORMANCE (20 points)** – Supplier can demonstrate the firm's capability and resources to provide the items/services requested in this solicitation in a timely and responsive manner.
- e. **OTHER EVALUATION CRITERIA.**

- FOOT PRINT (PRESENCE) (10 Points) . Supplier demonstrates broad country presence – by region and/or globally.
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12. **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.
13. **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 90 days after submission.

14. **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. Other clients may have different requirements which would be communicated to successful offeror(s).
15. **Certification.** The offeror, by signing its offer, hereby certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on its behalf in connection with the awarding of this contract.
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:

ATTACHMENT D

QUESTIONS AND ANSWERS

#	Question	Response
1	In which countries would RTI require Employer of Record support?	The exact countries needed are to be determined, as RTI primarily plans to use EOR services in countries where RTI wins a client-funded award in a country where RTI is not yet registered or do not plan to get registered. USAID is the largest client of RTI's International Development Group, and more information about USAID's countries of operation is available here: https://www.usaid.gov/where-we-work .
2	Our company must pay salaries in local currency (where the employee is based) unless the law says it is acceptable to do otherwise. In some countries it is possible to pay the salary in USD but is to be confirmed on a case-by-case basis.	<p>Generally, salaries should be paid in local currency as this aligns with RTI policies and client rules/regulations. As noted on page 3 of the RFP:</p> <p><i>Most of RTI's employment agreements are in local currency. Payments to the selected Supplier will be made from RTI's home office in US Dollar (USD). Monthly conversion to local currency from USD should use exchange rates that are verifiable, documented and widely known (such as Oanda). Support for exchange rates used will be required monthly.</i></p> <p>RTI expects that only in rare cases would salaries not be paid in local currency, and these situations would likely be tied to the feasibility to pay in USD as outlined in local labor law, or prevailing local practice (e.g., due to extreme inflation/market buying power challenges).</p>
3	We do not monitor leave – the employees are made aware of their entitlements and are required to submit leave request/sick days via our Platform. RTI will be given Platform access and it is your responsibility to monitor the leave taken. Is this acceptable?	If an EOR provider does not track leave, this is acceptable, and RTI can manage the leave. Please indicate that leave tracking is not among the services provided in the proposal. <u>The RFP Amendment #1 has been updated accordingly.</u>
4	Will the employee salary be fixed per month or payable as per the submitted timesheets?	Salaries are a fixed monthly rate, with the timesheet signed by both the employee and supervisor as supporting documentation for issuing payment. However, there may be instances where the fixed monthly rate is exceeded due to overtime. RTI aims to avoid overtime. In the rare instances where overtime is required, prior approval is needed. RTI compensates overtime in accordance with local labor laws. Overtime is noted separately on timesheets and compensated appropriately above the normal fixed monthly rate.
5	Are you looking to contract with a US company? Our invoices vary depending on the location [where] the worker is based.	<p>RTI's preference is to contract through a US entity, including US EOR providers that work through the organization's established subsidiaries. Please share information about a parent company and subsidiaries/affiliates in your proposal.</p> <p>Please note that ability to engage through subsidiaries or partnerships will be impacted by the specific award and location. For USAID-funded activities, which is RTI's largest client in the International Development Group, most awards have a USAID GeoCode of 937 which limits purchase of goods and services to US and recipient country/other "developing" country providers. For example, if a project was awarded in Ghana, RTI could procure from companies in the US or Ghana, or other "developing" countries. The alternative USAID GeoCode is 935, which allows procurement from certain countries except those deemed prohibited source countries. The list of prohibited source countries may change from time to time as determined by the USG. USAID determines</p>

		the GeoCode assignment for awards. USAID guidance on geocodes is <u>available here</u> : https://tinyurl.com/bdfc522x
6	We are unable to provide a schedule of clients served in the last 3 years due to confidentiality. Please let me know if this is not acceptable.	<p>The <u>RFP Amendment #1</u> is now updated to clarify that the following information is required for past performance:</p> <p>For the evaluation of past performance, bidders must provide a table/list which includes at least the following information over the period of the past 3 years: the countries in which the bidder performed, the number of staff that the bidder supported in those countries, and the type of support services provided. Listing the former/current client name(s) associated with each contract or activity is optional.</p> <p>Additionally, bidders must provide at least 3 references from current or past clients that the bidder was an EOR provider for in the past 3 years. References may be in the form of a letter and signed by an authorized agent of the referring company, or the referring company's contact information may be provided by the bidder authorizing RTI to contact the company directly.</p> <p>Survey results that redact client identifying information may also be included in addition to the requests above.</p>
7	Please provide job descriptions for each role as we will be required to review this information before confirming if we can support the job role.	RTI is unable to provide job descriptions in advance since it will be based on the awarded project, which may be in one of the following sectors: climate change, education, energy, environment, food security/agriculture, health, governance, and water. RTI generally works through government and local stakeholders, and does not provide direct services (e.g., does not have nurses/doctors for health projects, does not do direct student instruction for education projects). If there is a specific job type which a Supplier cannot support, please note this in your proposal.
8	Please note that for candidates who are currently employed by RTI, or have provided services to RTI previously, we require RTI to complete an Employment History Questionnaire. Our Compliance Team will then review and confirm we can employ the particular candidate.	Bidders should include additional documentation that RTI may be required to complete as the bidder's standard practice, including questionnaires, and specify when the documentation must be completed by RTI. <i>Please see Attachment C, Section 3.m.</i> RTI will determine whether certain documents are acceptable -- or discuss any issues regarding the documentation or the information requested therein -- if the bidder is selected as a contender in the solicitation process or at any such time the need arises.
9	Please confirm an approximate number of employees for both the large and medium projects.	Medium 20-50 employees, large is 50+.
10	Sorry if I am missing something within the RFP, but can you please help confirm what country/countries your team is looking for support in?	Regarding the request for clarification, please note RTI does not list a specific list of countries for this solicitation as RTI is seeking companies which service a broad range of locations (globally and/or in a region). RTI provided sample countries to use to cost out as options in the RFP. Please note the response to #1 above with a list of countries where USAID, RTI's International Development Group's largest client, operates.
11	Although these countries are not part of the primary country list, can we confirm we can apply with these three countries in mind. Are Ethiopia, South Sudan and Somaliland eligible countries for this EOR RFP? Please advise.	Yes. Any country can be used to price responses if a potential bidder does not operate in any of the sample countries listed. Note, however, that RTI aims to compare similar countries to the maximum extent possible as part of the evaluation.

<p>12</p>	<p>Our company is the primary vendor although we are looking to bring in partners [.] Please advise if our company can utilize affiliates and still be eligible to apply.</p>	<p>Yes, bidders with affiliates or partners are eligible to apply. Note, however, that subcontracting and partnership rules may apply, per the RTI PO terms and conditions. RTI prefers to minimize lower-tier subcontracting and other partnerships when contracting with vendors.</p> <p>If a bidder will utilize a lower-tier subcontractor, partners, or affiliates, bidders must identify the partnerships associated with each location (country, region, etc.) that is included in the bidder's proposal, and explain the legal relationship that is established or to be established between the partners; that is, whether a legally binding agreement exists and the type of partnership (e.g., contractor/subcontractor, subsidiary, consortium, joint venture, referral).</p> <p>If the affiliate is a subsidiary, bidders should note which entity owns the subsidiary (e.g., if your company is based in the US, has a subsidiary in Malawi that is owned by a British branch).</p> <p>All partners will be subject to the same documentation requirements are the primary contractor, including the registration documentation.</p> <p>Please note that this RFP is for a Master Service Agreement under which there would be multiple purchase orders. Each purchase order is governed by the client's rules for the specific award. For awards/projects which are USAID funded, purchase orders would be governed by the assigned USAID GeoCode (described in #5 above). Depending on the assigned GeoCode from USAID, the nationality of the subsidiary may or may not be feasible (or a waiver may be requested and up to USAID to determine allowability).</p> <p>RTI will do its best to work to identify a solution in collaboration with the EOR partner given the status of subsidiaries, though, as noted elsewhere in the RFP, RTI prefers to contract through a US entity.</p> <p><u>The RFP Amendment #1 has been updated to reflect part of this response.</u></p>
<p>13</p>	<p>Currently, we have authorization in Ethiopia. However, while we do not have the license in [African Country] and [African Country], we have partners. In order to be a supplier for this service, does the main supplier, our company, need to have authorization in all three countries or it is sufficient if our affiliates have the authorization.</p>	<p>Please see the response to #12 above.</p> <p>Bidders should summarize the countries where they operate directly or through an affiliate and specify the relationship with the affiliate.</p>
<p>14</p>	<p>Is sub-contracting opportunity exists for affiliates. Please advise</p>	<p>Please see the responses above for #12 and #13.</p> <p>Bidders should summarize the countries where they operate directly or through an affiliate, subcontractor and specify the relationship with the affiliate/subcontractor.</p>
<p>15</p>	<p>In attachment C, section 3 Proposal Requirement. You list out (A-P) what the seller's proposal shall include. Would you preference be that we structure our answers in this</p>	<p>The format is up to the bidder, but the approach described would be easy for reviewers to quickly identify relevant answers and assess the appropriateness for RTI's needs.</p>

	<p>format? For example: (G) Lead Time Availability of the Commodity/Service --> then we'd include our answers. If there is another way in which you'd like us to structure responses so you clearly know what we're answering, please let us know</p>	
16	<p>Attachment A statement of work. You mention "fast and effective responses to any issues." Do you have a definition for "fast" or desired metric you'd like in terms of response time?</p>	<p>RTI would work with the successful bidder(s) to establish service level agreement timelines. Generally, RTI's expectation is a 1 business day response, which would include a suggested resolution timeline to address the issue efficiently. Bidders should state if the bidder has an established response turnaround time.</p>
17	<p>A EOR Administrative Expectations B 1: Monthly timesheets to be signed by employee and supervisor. Are electronic approval processes for submitting timesheets acceptable? For example, we can include in the timesheets a log of when the timesheet was 1) sent for approval by the employee and then 2) approved by the manager with the managers name and date it was approved</p>	<p>Electronic approval processes are acceptable. The employee would need to "sign" the timesheet electronically confirming that it is accurate. As practice, RTI's internal process requires an electronic signature. And the supervisor must "sign"/approve as well. The scenario provided in the question would be acceptable as long as the employee signs (electronically is fine), as well as the supervisor.</p>
18	<p>A Technical Proposal Requirements, 1 B, vii. You mention "demonstrate authorization to provide EOR services..." Outside of tax certificate, proof of registration, unique entity identifier number, do you have other examples of authorization you might be looking for or would the former meet your requirements?</p>	<p>RTI recognizes that each country or region may have different requirements for registration and that the proof of registration may differ. Ultimately, the documentation must show that the bidder or its affiliate is legally recognized to operate as an EOR service provider in that country or region pursuant to the local laws. Additional documentation or authorization may be requested by RTI at any time.</p> <p>RTI may also consider additional documentation in the bidder's proposal that serves to further demonstrate or evidence the bidder's authorization to operate in that country, such as an official statement from a country official or legal representative that attests the bidder is a legal entity authorized to operate as an EOR for that specific country or region. Note that a legal statement or additional documentation cannot be a substitute for the required documents, such as official country registration, tax certificates, Unique Entity Identifier, etc.</p>