Request for Proposal (RFP) - Consultant Services

About CHAI

The Clinton Health Access Initiative, Inc. (CHAI) is a global health organization committed to saving lives and reducing the burden of disease in low-and middle-income countries. We work with our partners to strengthen the capabilities of governments and the private sector to create and sustain high-quality health systems that can succeed without our assistance. CHAI was founded in 2002 with a transformational goal: help save the lives of millions of people living with HIV/AIDS. Today, along with HIV, we work with partners to prevent and treat malaria, tuberculosis, hepatitis, and cancer, accelerate the rollout of lifesaving vaccines, reduce maternal, infant and child mortality, combat chronic malnutrition, and strengthen health systems. We operate in over 35 countries around the world and more than 125 countries have access to CHAI-negotiated deals on medications, diagnostics, vaccines, and other health tools.

CHAI currently employs over 1700 staff and processes payroll in 45 countries. Most staff are in the countries where we work, overseeing implementation and managing our relationships with governments. The teams on the ground are complemented by global teams of technical and business experts that lead global market shaping efforts and support in-country work and by operations management, information technology, finance, and human resources teams, both in Boston and around the globe.

1.0 RFP Purpose

CHAI is soliciting bids from qualified vendors offering to provide global payroll services (“Global Payroll Services”) as described in this RFP (and in the related documentation and information exchanged through the solicitation process). CHAI expects that as part of the bid response, bidders will provide estimated time, labor, and implementation cost estimates for the Global Payroll Services. The winning vendor will provide Global Payroll Services, including processing timely payments to employees as well as payments and record keeping related to statutory payroll taxes and social contributions.

2.0 Current business need

CHAI processes payroll in 45 countries, 35 of which have physical offices. Currently CHAI processes payroll for four categories of staff: Nationals, Third Country Nationals, US Expats, and Volunteers. CHAI is looking for a partner who can provide high-quality, timely, and effective Global Payroll Services to meet CHAI’s global payroll needs. The vendor will work closely with the CHAI’s payroll department based in Boston, MA.
As a best practice in relation to financial and vendor management, CHAI is soliciting competitive proposals for Global Payroll Services to ensure that CHAI is offered leading industry services at competitive prices.

As part of the Global Payroll Services, the provider must offer access to its payroll system and process through a portal that can be accessed in countries for teams to run reports that are instrumental to their needs.

### 3.0 Proposal terms

#### 3.1 Estimated Schedule

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
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<tbody>
<tr>
<td>Release of RFP</td>
<td>Tuesday March 8, 2022</td>
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<tr>
<td>Bidder Submission of Questions</td>
<td>Friday March 18, 2022</td>
</tr>
<tr>
<td>NDA distributed to Bidders</td>
<td>Monday, March 21, 2022</td>
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<tr>
<td>Interested Bidders Completion of NDA</td>
<td>Wednesday, March 23, 2022</td>
</tr>
<tr>
<td>CHAI to Distribute questions and answers</td>
<td>Friday March 25, 2022</td>
</tr>
<tr>
<td>Bidders Proposals Due</td>
<td>Friday April 11, 2022</td>
</tr>
<tr>
<td>Interview/Demos scheduled</td>
<td>from April 29, 2022</td>
</tr>
<tr>
<td>Select finalists</td>
<td>June 2022</td>
</tr>
<tr>
<td>Identification of winning bidder</td>
<td>July 2022 (mid-July)</td>
</tr>
<tr>
<td>Contract Execution</td>
<td>August 2022 (mid-August)</td>
</tr>
<tr>
<td>Implementation completed</td>
<td>Q4 2022</td>
</tr>
<tr>
<td>Roll out</td>
<td>completed January 2023</td>
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#### 3.2 Questions Concerning the RFP

Any questions or inquiries on the RFP must be in writing and received prior to Friday, March 18, 2022. They may be directed to Linda Dearborn (Sr Payroll Manager) at ldearborn@clintonhealthaccess.org and Palesa Mohasoa (CHAI International Controller) at pmohasoa@clintonhealthaccess.org. Any material questions that are received will be responded to via email. CHAI will then post all answers to question on Friday March 25, 2022, to all vendors.

#### 3.3 Proposal Submission

Vendors must submit their proposal by no later than the end of the business day on Monday April 11, 2022, to be considered. In addition, the bidders must include a written description of the business model they have in countries and governance processes. They should be submitted to Linda Dearborn (Payroll Manager) at ldearborn@clintonhealthaccess.org and Palesa Mohasoa at pmohasoa@clintonhealthaccess.org. Upon review and approval of selected partner, interviews and demos will be scheduled.
3.4 Confidentiality

All information presented in this RFP, including any information that is subsequently disclosed by CHAI staff during the proposal process (verbally and in writing), should be considered strictly confidential. Proposal contents will be held strictly confidential by CHAI.

3.5 Miscellaneous

This RFP does not convey a commitment to award a contract or to purchase services. CHAI reserves the right to accept or reject any or all proposals or to cancel this RFP for any reason (stated and unstated). CHAI will not be liable under any circumstances for any expenses incurred by any partner in connection with the selection process or any costs incurred in preparation of its response. CHAI is not obligated to award to the least cost or any proposal.

3.6 Selection Criteria

Any proposal may be rejected if it is late, conditional, incomplete or deviates from the specifications in the RFP. CHAI reserves the right to request additional information or discussion or presentation in support of the written proposal. The CFO will review all proposal submissions and make the final selection based upon feedback from the project team and references. Proposals will be rated on a weighted scale of 1 to 5 based upon but not limited to the following key criteria where 1= Very poor, 2= Poor, 3= Adequate, 4= Good and 5= Very good.

<table>
<thead>
<tr>
<th>Selection Criteria</th>
<th>Importance (Weight)</th>
<th>Score</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultant’s experience and expertise relevant to CHAI’s requirements</td>
<td>4</td>
<td></td>
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<tr>
<td>Consultant’s client base and geographical coverage including their in-country partners</td>
<td>4</td>
<td></td>
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<tr>
<td>Vendor’s resource capacity, years of operation and references</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employed formal organizational tools/methods/systems and policies</td>
<td>3</td>
<td></td>
<td></td>
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<tr>
<td>Budget cost effective for a Non-Profit Organization</td>
<td>4</td>
<td></td>
<td></td>
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<tr>
<td>Integration to HRIS and Finance systems</td>
<td>3</td>
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4.0 Proposal specifications

4.1 Global Payroll Provider

CHAI is seeking a Global Payroll Provider to provide Global Payroll Services and to work with CHAI’s Boston finance team to:

- Ensure overall country payroll compliance including mandatory government obligatory deductions.
- Ensure the correct taxation is applied for all classes of employees (Local National, Third Country Nationals and Expats, Volunteers, Secondees) - including taxable fringe benefits per legislation e.g., pension, medical insurance, per diem relocation and home leave, etc.
- Calculate accurate Gross to Net earnings monthly.
- Timely remittance of tax obligations and accurate, up-to-date records, including but not limited to, stamped tax remittance receipts to be shared with country teams at the end of the month following the payroll cycle.
- Timely and correct net pay received in all employee accounts by the contracted pay date.
- Provide monthly pay slips for employees to download by the contracted pay date.
- Ensure all monthly, quarterly, and year-end filings and other statutory obligations per country are processed and filed in accordance with the country guidelines (deadlines).
- Any other relevant services as may be necessary for the timely and sufficient processing of payroll.

4.2 Expected Outcome

- CHAI payroll tax and social contributions compliance in all countries covered under global payroll.
- Develop a strong and confident partnership.
- Eliminate or mitigate risk where it exists.
- Up-to-date and accurate communication between all partners (payroll, country teams, vendor and in-country providers included).
- Country team access to portal for reporting purposes and communication.
- Timely employee net payments.
- Accurate calculations.
- Meet all agreed KPIs.
- Systems integration (HR, Finance and BOX) via API or flat file capability bi-directional.
- Monthly reconciliation of all payroll registers to remittances.

4.3 Preferred Consultant Credentials

- Project Management Professional (PMP).
- Business development experience.
- Governance of Enterprise Information Technology (CGEIT).
- Account management.
4.4 Skills and Experience

- Minimum 10+ years direct experience in global payroll processing and management for small-to-medium size businesses (in for-profit and non-profit organizations).
- Data protection and management that complies with GDPR in all countries.
- Treasury services.
- Improved efficiencies (self-service portal, reconciliation, filing of receipts, etc.).
- Global reporting.
- Data collation.
- Managing in a diverse environment.
- FX management.
- Financial risk management.
- Integration with HRIS Systems: examples of platforms/products where vendor has successfully integrated with client’s HRIS systems vs stand-alone payroll system, or examples of platforms where they do not yet can integrate.
- Benefit implications
  - Workers’ compensation codes and calculations.
  - Retirement fund review to monitor annual contributions, employer match and overall limit including true up match.

4.5 Logistics

- Following the release of the RFP, and before CHAI shares any additional information, we will require vendors sign a non-disclosure agreement.
- CHAI may seek additional information and/or clarifications at key milestones in the solicitation process (e.g., after bid submissions). Vendor’s response to this information may be required before vendors move to the next round for selection.
- Demos to be presented to Payroll, Accounting, HR and country teams, best source of delivery to be decided (zoom or teams).
- Completed implementation is anticipated to be within four to nine months (if not sooner) of contract execution.

5.0 Requested proposal information and documents

5.1 Vendor and Candidate Information

Please include in your proposal the following background information regarding your organization and the staff who would work on this project:

- Company name, address, tax ID.
- Organization chart, description of company’s experience with non-profit organizations.
- Identify primary contact person, project leader, and other staff to be involved in the project.
- Indicate the anticipated role and responsibilities of each staff person on the project and their prior experience on similar projects.
- Provide three recent (or current) international non-profit clients.
- Disclosure of any potential conflicts of interest.
• List of countries where you have coverage.
• If applicable, include in-country partner list.

5.2 Technical Proposal Information Required
• Summary of the vendor’s experience relevant to CHAI’s RFP need and any supporting documents.
• Information that will facilitate evaluation of the consultant and vendor’s qualifications (max. four pages).
• Detailed description of how the vendor will respond to CHAI’s proposal terms, including but not limited to timeline, objectives, and methodology (max. four pages).
• Relevant signed curriculum vitae of all submitted consultants.

5.3 Financial Proposal Information Required
• Itemized summary of all costs of services proposed in US dollars.
  o Implementation costs
  o Monthly costs
  o Off cycle processing
  o Out of scope etc.