



Request for Proposal (RFP)

Issued on: December 2, 2024

Solicitation Number: **US9069**

For: Employer of Record services (EoR)

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Introduction to Catholic Relief Services

Headquartered in Baltimore, Maryland, Catholic Relief Services (“CRS”) eases suffering and provides assistance to people in need, without regard to race, religion or nationality. CRS has around 8,000 staff based in the United States and Overseas. Overseas, CRS organizes its operations at the country-level into Country Programs (CPs), and at the regional-level into regions.

Objective

CRS has workers working in countries where CRS is not a registered employer. CRS seeks an Employer of Record (EoR) to ensure employment, immigration, and tax compliance for workers in those countries.

Therefore, CRS is seeking an Employer of Record to facilitate compliant, efficient, consistent, and effective worker management in countries where workers are located. The preferred EoR will be registered to operate in countries which CRS deems priority, employ workers, and manage the worker compliance with all labor, tax, and other applicable laws. The EoR will resolve gaps, inefficiencies, and root causes of pain points in the support of workers in those countries.

Statement of Work (SOW)

Refer to Annex A for the Statement of Work and project details including Program Management, Worker support, Benefits, Payroll, workflow and Legal requirements.

Refer to Annex B for the requirements matrix. Matrix must be completed by the bidder and returned with proposal.

CRS may add additional countries or remove countries at implementation or during the engagement as workers are identified.

Bid Requirements and Evaluation

CRS seeks to identify the proposal that offers the best value-for-money and reserves the right to engage in negotiations with Suppliers upon completion of the evaluation process.

Proposals will be evaluated in three stages as follows:

Administrative Evaluation:

Interested bidders must have legal status in their country of operation and submit a copy of Articles of Incorporation, Certificate of Status, or other proof of legal status with the proposal.

Technical Evaluation:

Interested bidders must submit a technical response that addresses the statement of work and requirements matrix, including how their solution achieves the goals and technical requirements listed in this RFP - Annex A and B. Annex B must be completed by bidder and returned to CRS with proposal.

Upon review of written technical responses, CRS may request:

- An oral presentation of the service delivery and demonstration of the proposed supporting technology.
- References from 3 current Non-Profit clients.

Financial Evaluation:

Bidders are asked to submit their financial offer for all services to be provided at the same time as they submit the Administrative and Technical requirements.

Conflict of Interest:

A conflict of interest arises when the private interests of an implementing partner, supplier, consultant or contractor conflict with the best interests of CRS and/or when their interest or loyalties could prevent them from deciding only in the best interest of CRS. Bidder must notify CRS of any potential conflict of interest situation. A conflict of interest does not preclude CRS from working with a vendor, but the disclosure is required.

Intent to Bid:

Bidders who intend to respond to this RFP are encouraged to notify CRS of their interest to bid as soon as possible or by December 15, 2024.

Clarifications

Bidders are strongly encouraged to submit any questions or need for clarification via e-mail to michele.dockery@crs.org and jolenecoachy.jeanbaptiste@crs.org no later than December 16, 2024. Solicitation number US9069 must be included in the subject line. All questions will be answered in blind copy to all bidding organizations who have shown intent to bid and/or who have submitted questions.

CRS is under no obligation to respond to questions that are not received prior to the deadline.

Proposal Deadline

All proposals must be received by CRS no later than 5:00 PM EST on January 15, 2025.

Bid Submission

Offerors will be required to submit two proposals, electronically, one a technical proposal and the other a cost proposal. Proposals must be submitted in one submission, via email to michele.dockery@crs.org and jolenecoachy.jeanbaptiste@crs.org and with subject reference: US9069 – EMPLOYER OF RECORD, no later than the proposal deadline. CRS is not obligated to consider late submissions.

Bid Validity

Proposals must be valid for at least ninety (90) days from the Date of Receipt. All proposals must be submitted in English.

Modification

If at any time prior to the award CRS deems there to be a need for a significant modification to the terms and conditions of this RFP, CRS will issue such a modification as a written RFP amendment to all competing offerors. No oral statement of any person shall in any manner be deemed to modify or otherwise affect any RFP term or condition, and no offeror shall rely on any such statement. Such amendments are the exclusive method for this purpose.

Resulting Award

As a result of this solicitation, CRS anticipates engaging a single company, but reserves the right to engage more than one award should it be needed (in the case one provider cannot support CRS in all locations).

Proposal Acceptance and Rejection

CRS is not bound to accept the lowest or any proposal and reserves the right to accept any proposal in whole or in part and to reject any or all proposals. CRS shall not be legally bound by any award notice issued for this RFP until a contract is duly signed and executed with the winning offeror.

Terms

CRS reserves the right to cancel this solicitation at any point and is under no obligation to issue a contract because of this solicitation. CRS will not reimburse any expenses related to the preparation of any proposal related to materials or delivery.

The successful supplier must be able to support Net 30-day payment terms for invoicing and all payments related to payroll delivery.

Bidders, Suppliers and Service Providers, while conducting their activities, are expected to comply with the following policies and regulations:

- CRS Terms and Conditions: <http://crs.org/vendor-terms/vendor-terms.pdf>
- CRS Suppliers and Service Provider Code of Conduct: https://www.crs.org/sites/default/files/supplier_code_of_conduct.pdf

Countries where CRS Anticipates EoR Services.

CRS does not commit to worker volumes or specific countries. CRS expects, but does not guarantee, having approximately 50 - 60 workers employed by the EoR monthly. In a twelve-month period, CRS' annual salary spend for current program participants is USD \$4 million, and an average of 46 participants a month across an average of 20 countries.

The below countries illustrate CRS presence. X indicates those CRS seeks further information as outlined in the Description of Supplier Services.

CRS Region	Country	Average Monthly Volume of Employees	Required Cost Estimate & Benefit Summary
EMECA	Belgium	< 3	
EMECA	Bulgaria	< 3	
EMECA	Denmark	< 3	
EMECA	Finland	< 3	X
EMECA	France	10 to 15	X
EMECA	Germany	< 5	X
EMECA	Ireland	< 5	
EMECA	Italy	< 5	
EMECA	Luxembourg	< 3	
EMECA	Netherlands	< 5	
EMECA	North Macedonia	< 5	
EMECA	Portugal	< 5	
EMECA	Spain	< 5	X
EMECA	Sweden	< 5	X
EMECA	Switzerland	< 5	X
EMECA	Turkey	< 5	X
EMECA	United Kingdom	15 to 20	X
LACRO	Colombia	< 5	
LACRO	Costa Rica	< 5	X
SARO	South Africa	< 3	
North America	Canada	10 to 15	X

ANNEX A: STATEMENT OF WORK

The below SOW contains guidance for bidders regarding information which must be submitted with proposals:

1. Please update the Supplier Comment column on the attached Annex B: CRS Requirements Matrix (Employer of Record) spreadsheet with your company's ability to support each criterion. Annex B is provided separately with only the supplier comment column as an editable column. Bidders should use the provided format.

2. Please answer the below questions in your RFP response and provide any other information that details your program offerings, what stands your company apart from your competitors, and any other information that you think will help CRS make an informed decision about your company's ability to support our program.

a. Company Structure

- a. Outline the entity structure and ownership network of your local employing entities. Provide a list of countries where you operate and identify by each where you wholly own the local entity that would employ a worker and where you partner with an external provider to employ workers.
 - i. In that country list, outline the methodology used in each country to "assign" the worker to a client, is it an employee lease, secondment, or other type of agreement.
 - ii. Indicate by country when a separate EoR/CRS individual lease agreement may be needed in addition to an EoR/Worker contract. Indicate which countries have collective bargaining agreements.
- b. Outline any restrictions on worker travel into conflict zones, limits in duration of travel for Temporary Duty assignments, limits on worker ability to sign documents on behalf of client, limits on client ability to build benefit plans, etc.
- c. Outline your indemnity requirements.
- d. Briefly outline other support services available for administering contractors/consultants.

b. Implementation

- a. Describe the Implementation of your services with new clients. Include the estimated time a client would need to devote to implementation and how quickly services can be stood up.
- b. Describe how your company typically implements the transition of current workers employed by an incumbent Employer of Record to your employment.

c. Compliance and Service Delivery

- a. Outline how the company supports the worker lifecycle, where centralized support is provided from, hours of live support availability, methods of communication with workers, managers, and client program managers, etc.
- b. Detail the cadence of communication with workers and managers.
- c. Explain how changes are communicated to client program managers, how updates in local laws that affect clients are relayed, and how those updates are implemented to ensure compliance for existing workers. Ex. statutory salary increases, changes in benefit laws, new labor laws for overtime, etc.
- d. Provide a one-page summary of the statutory and mandatory benefits & training in countries with an X listed above. Outline any flexibility CRS will have in altering the private benefit plans. Include whether a Collective Bargaining agreement applies that limits or mandates benefits in that country.
- e. Outline the documentation and other resources that are provided to workers pre-employment, during employment, and at the end of employment.
- f. Describe how you manage the onboarding and offboarding process, ex: how do you share completed employment contracts and exchange payroll information with clients.
- g. Outline the approach taken to worker complaints.
- h. Provide sample reports, including worker roster, pay stub, expense reporting, time reporting, sample invoice, cost analysis, cost estimate, and any other reports that showcase your company's services.

- d. Technology
 - a. Provide information about your client service platform, including how a worker would access, how a CRS manager would access, and how CRS' program management team would access, as well as what screens and information are available to each user group.
 - b. Provide information on how your company ensures data privacy and data integrity among your employer entities.
 - c. Provide examples of training materials for your platform.

- e. Fees & Costs
 - a. Outline in detail what is included in the management fee - presuming monthly or by employment phase. Additionally, please outline in detail what would be ad hoc requests or project-based requests that would result in additional fees to CRS.
 - b. Detail your implementation fee and what that includes.
 - c. Detail your timing and process for deposits and invoicing. Include a sample of a standard client invoice.
 - d. Provide estimated costs for an individual by country (see the Countries list above) for statutory benefits and proposed provider fee (based on estimated \$100,000 annual salary).
 - e. Separately provide a cost estimate by country (see the Countries where CRS Anticipates EoR Services) including the statutory and any non-statutory standard benefit packages.

Oral Presentations and Technology Demonstrations

Suppliers invited to an oral presentation of their Service Delivery model and demonstration of their technology should be prepared to demonstrate the following during an anticipated 2-hour virtual presentation. Oral presentations are not guaranteed. Only bidders who have successfully submitted proposals that meet the evaluation criteria may be invited to an oral presentation.

- 1) Oral presentation of the worker employment lifecycle support, service delivery, communication platforms, etc.
- 2) Demonstrate approach to benefits administration and support.
- 3) Demonstrate how employee lifecycle actions like onboarding, promotions, salary updates, and terminations are initiated and communicated.
- 4) The technology platform;
 - a) the “view” that the program administrators, worker, and managers have
 - b) the workflow from the initiation of a worker, cost estimate, contract approval, through their first payroll
 - c) the process for time and expense reporting, approvals, follow-ups, etc.
- 5) Showcase differentiation from competitors.

Section	Content Guidelines	Purpose
<p>Statement of Problem</p>	<p>CRS has workers in countries where CRS is not registered. CRS seeks to engage an Employer of Record (EoR) to employ and second or lease those workers to CRS. The EoR will manage and take ownership of worker compliance with employment, immigration, and tax laws in those countries.</p> <p>CRS may retract or expand scope, worker volume and country locations at any time. See attached CRS Requirements Matrix (Employer of Record) for additional details of the scope of work required.</p>	<p>CRS is not able to register in every country where workers may wish to reside and seeks a provider to employ and manage the employer compliance responsibilities for those workers.</p> <p>CRS staff come from over 100 countries. CRS' goal is to be compliant in priority countries where CRS has volume of workers residing/working.</p> <p>EoR tracks compliance to ensure worker agreements and benefits comply with local labor laws and regulations.</p>
<p>Goal/Objectives & Desired Benefits</p>	<p>CRS is seeking an Employer of Record to facilitate compliant, efficient, consistent, and effective worker management in countries where workers are located. The preferred EoR will be registered to operate in countries which CRS deems priority. The EoR system will resolve gaps, inefficiencies, and root causes of pain points in the support of workers in those countries.</p> <p>CRS primarily seeks EoR services in developed countries as CRS has entities in many less developed countries and manages compliance through its own entities.</p>	<p>Seamless Worker lifecycle management.</p> <p>Central location for all worker information, easy access through a user-friendly platform.</p> <p>Fair and equitable benefits aligned with CRS needs.</p> <p>Advances communication and collaboration between CRS, EoR, workers, and managers.</p> <p>Document control and security (e.g., viewing, editing, approving contracts & amendments, payroll etc.).</p> <p>Robust worker management platform.</p> <p>Tracking of overtime, paying and processing expenses, and other assorted employer support.</p> <p>Accurate invoicing by worker and cost center.</p> <p>Able to support worker travel globally, including into conflict zones.</p>
<p>Deliverables for RFP Response</p>	<p>Showcase implementation of Employer of Record Solution which:</p>	<p>Demonstrates that the ability of the EoR to adequately manage its local employer entities;</p> <p>Enables a rhythm of the business giving CRS teams adequate support, time to review, revise, gain approvals, and onboard workers;</p>

		<p>Decreases the average time spent in onboarding new hires;</p> <p>Increases consistency of the benefits and treatment of workers across the globe and increases the number of work arrangements which are compliant with CRS' mission and applicable legal regulations;</p> <p>Provides easy access to worker information, payroll, and benefit information for all workers and supports consistent experience for workers and their CRS managers;</p> <p>Provides reporting and easy tracking of worker information, status in the hire/employment process, cost/invoices, pending end dates, etc.;</p> <p>Provides streamlined and easy follow up with EoR contacts;</p> <p>Easy Invoicing.</p>
Service Pricing	CRS requires a monthly fee quote that includes all worker services. This may be in the form of a fee per worker per month or a fee per worker per phase of employment process (i.e. Onboarding, Employed, Offboarding).	<p>Provides easy invoicing by employee and cost center;</p> <p>Fees are easy to explain to the business and reasonable for the support provided;</p> <p>Ad hoc pricing is clearly defined;</p> <p>Cost estimates demonstrate realistic costs of statutory and non-statutory benefits.</p>
Contract Monitoring	SLAs will be required for respondents.	<p>Response time within 24 hours for hire requests;</p> <p>2 week advance notice of impacts from updates and overviews of system enhancements;</p> <p>100% Accuracy in Reporting;</p> <p>Availability of software globally 100% of the day;</p> <p>Software smoothness as workers progress through the workflow;</p> <p>Invoicing accuracy and easy processing;</p> <p>Others to be developed.</p>

Annex B - Matrix				
Requirement Type	Requirement #	Requirement Description	Priority	Supplier Comment on Ability to Meet Requirement
Benefits	1	Offer private healthcare, vision, dental benefits that align with Catholic Social teaching (CRS does not provide certain medical procedures, medicines, or treatments). If Benefits cannot be aligned, ability to only offer statutory benefits	Must have	
Benefits	2	Ability to adjust vacation accrual to match CRS policy,	Must have	
Benefits	3	Track and report to CRS vacation and holiday time	Must have	
Benefits	4	Able to provide Benefit Summary outlining country benefits that can be provided to candidates prior to acceptance of role	Must have	
Benefits	5	Ability to track work time reported by CRS Project Code	Nice to have	
Invoicing	6	Ability to invoice CRS by cost center (CRS uses the term POET) and worker	Must have	
Invoicing	7	Ability to invoice CRS for expenses and reference specific CRS cost centers	Must have	
Invoicing	8	Ability to report and split employee invoice costs among several cost centers	Nice to have	
Invoicing	9	Invoice net payment terms 20 days	Must have	
Invoicing	10	Ability for CRS to use its own broker when making payments in non USD currency	Must have	
Legal Requirements	11	Manage response to legal complaints from workers/former workers brought in local courts	Must have	
Legal Requirements	12	Demonstrate that EoR owns its local operations and does not outsource to other providers (those not acting as a subsidiary or wholly owned entity) at the country or canton level	Must have	
Legal Requirements	13	Ability to provide indefinite worker contracts	Must have	
Payroll	14	Ability to pay worker via direct deposit/ACH in local market. CRS does not ask that EoR deliver pay outside the country of employment or in currency other than that of the country of employment.	Must have	
Payroll	15	Ability to process business expenses with reference to CRS cost centers provided by worker	Must have	
Payroll	16	Automated process for requesting one time payments, salary changes, etc.	Must have	
Payroll	17	Ability to accurately calculate, deduct, and remit individual taxes to local tax authority	Must have	
Payroll	18	Ability to absorb CRS Per Diems and process via local payroll	Nice to have	
Program Management	19	Able to provide estimated net pay for workers prior to hire	Must have	
Program Management	20	Ability to support CRS staff who deploy to conflict zones	Must have	
Program Management	21	Ability to support CRS staff on temporary duty missions (3 months)	Must have	
Program Management	22	Able to support high volume of workers (50-100)	Must have	
Program Management	23	Act as employer of record, provide consulting as needed on appropriate legal / compliance actions for various situations (ex. performance improvement actions, lay-offs; leave compliance)	Must have	
Program Management	24	Solution provides compliance with GDPR regulations and other data privacy compliance requirements	Must have	
Program Management	25	Ability of worker to sign CRS documents / contracts	Must have	
Program Management	26	No restriction on the number of individuals that may work for CRS in a single country through the EoR platform	Must have	
Program Management	27	Ability to provide services in all European, Asia, Middle East, and Central / South American countries.	Must have	
Program Management	28	Ability to provide consulting advice on specific work scenarios at hoc	Must have	
Program Management	29	Ability to provide total program cost reports broken down by worker/country/cost center	Must have	
Reporting Requirements	30	Ability to provide on demand reporting on worker costs, locations, etc.	Must have	

Annex B - Matrix				
Requirement Type	Requirement #	Requirement Description	Priority	Supplier Comment on Ability to Meet Requirement
Reporting Requirements	31	System track certain CRS dictated worker information, CRS Grade, CRS Salary in local currency, CRS Manager, CRS Business Title, etc. and ability for CRS to report on these fields	Must have	
Reporting Requirements	32	Provide CRS salary and paycheck information ad hoc and in reporting as needed (even for GDPR countries)	Must have	
Worker Support	33	Ability to track time reporting, advise manager when individuals come close to hitting maximum statutory overtime limits, etc.	Must have	
Worker Support	34	Ability to advise whether certain visa's require or prohibit local employment. Ability to monitor visa status of workers and remind worker when visa is about to expire, alert CRS about pending expiration. (CRS does not ask EoR to sponsor work permits)	Must have	
Worker Support	35	Provide Pre-employment Orientation prior to offer to answer candidate questions	Must have	
Worker Support	36	Support maximum 3 week hire / onboarding after worker signs contract and provides all required data	Must have	
Worker Support	37	Validates worker authorization. (CRS does not request provider to act as sponsor for local work permits, all workers must be able to secure local work authorization on their own)	Must have	
Worker Support	38	Ability to employ individuals with high travel volume and extended work duration in countries other than where employed.	Must have	
Worker Support	39	Able to offboard worker transferring to CRS employment with worker resignation notice within 2-3 weeks	Nice to have	
Worker Support	40	Offer services to manage contractor engagements	Nice to have	
Workflow Requirements	41	Automated Onboarding	Must have	
Workflow Requirements	42	Automated Cost Projection by worker including supplier fees and employer estimated taxes	Must have	
Workflow Requirements	43	Employment Contract Automated Generation and Automated CRS program approval prior to sharing with worker	Must have	
Workflow Requirements	44	Automated Approval process for worker / manager expense/time/etc.	Must have	