

Request for Proposal for
Agency for Managing Processing of Out-of-Pocket Expense Payments for Volunteers under the EMBED Project

Period of Performance: 10 November 2025 – 31 March 2025

I. INTRODUCTION & BACKGROUND

The EMBED Project engages approximately 10,000 volunteers in project villages/ bastis across Bhopal, Gwalior, Indore, Jabalpur, Balaghat, Shivpuri, Sheopur, Bhind, Datia, Neemuch, Sidhi, Morena, Vidisha, Seoni, Chhindwara, Narsinghpur, Dindori, Ratlam, Sehore, Lucknow, Kanpur, Agra, Meerut, Mirzapur, Sonbhadra, Bareilly, Badaun, Hardoi, Sitapur, Firozabad, Prayagraj, Gadchiroli, Thane, Palghar, Chandrapur, Gondia and Mumbai districts who undertake various field-level tasks including home visits and project activities. More districts may be added in future.

To ensure transparency, accuracy, and efficiency in processing out-of-pocket expense (OPE) reimbursements for these volunteers, a third-party agency will be engaged to manage the complete process of documentation, verification, and disbursement of payments.

II. Objective

To engage a professional agency/ NGO to manage, verify, and process volunteer out-of-pocket expense payments, ensuring timely and compliant reimbursement with proper documentation and financial accountability.

III. Scope of Work

The selected agency will be responsible for the following tasks:

1. Assign three dedicated point of contacts (One for each state) for FH India team for coordination
2. Data Collection and Verification
 - Receive and compile original volunteer task sheets and verification records from the EMBED Project team.
 - Verify the completeness, authenticity, and accuracy of submitted documents.
 - Maintain and submit original records of verified volunteers eligible for payment each month.
3. Payment Processing
 - Prepare a consolidated statement of OPE payments due to volunteers.
 - Disburse payments directly to volunteers' bank accounts through secure and traceable modes.
 - Maintain a transaction log and confirmation receipts for all payments made.
4. Documentation and Reporting
 - Submit a detailed invoice to the EMBED Project team, including:
 - Summary sheet of payments processed
 - Copies of original signed task sheets completed by volunteers
 - Payment confirmation receipts
 - Any other supporting documentation required for audit or verification purposes
 - Ensure audit ready records are organized and submitted to FH India.
5. Compliance and Financial Management
 - Ensure all payments adhere to project guidelines and financial norms.
 - Maintain confidentiality and data integrity.

6. Deliverables

- Verified list of volunteers and tasks completed by them each month
- Proof of payment (bank confirmation receipts)
- Monthly invoice with all original supporting documentation
- Summary report/ BRS of disbursements and pending claims

IV. Payment Terms

- The agency will submit a monthly invoice for reimbursement of the total amount disbursed to volunteers along with all supporting documents.
- A management fee will be paid on actuals and confirmed payments to volunteers, as per the agreed rate and reflected in the same invoice.
- Payments to the agency will be made as reimbursement of actual payment transferred to volunteer accounts after verification and approval by the Finance team of FH India.

V. Duration of Engagement

- The engagement will be for the period of 10-November 2025 to 31-March 2026, subject to satisfactory performance and mutual agreement for continuation.

VI. Reporting and Coordination

- The agency will work under the guidance of the FH India Finance team and will coordinate with designated district or state project representatives for document verification and data sharing.

VII. Criteria For Evaluation

Proposals will be assessed in the following order of importance:

- Evidence of similar work undertaken in the past
- Names of clients with whom similar work has been undertaken in the recent past, with contact details.
- Team structure, team profile who will be assigned to this project. Team Leader to be indicated with credentials.
- Total cost along with break-up aligned with deliverables.

Note: Evaluation criteria from 1 through 3 form technical components.

The selected agency will be notified on or before Novem 10, 2025.

VIII. RFP Terms and Conditions

Offerors are responsible for review of the terms and conditions described below. If relevant, particular attention should be paid to clauses regarding marking and branding requirements and equipment and commodity purchases.

A. Confidentiality

During the course of this agreement, the parties may make available to each other certain confidential or proprietary information or one party may otherwise learn of confidential or proprietary information belonging to the other party. Both parties shall respect the confidentiality of information expressly provided by each of them as “confidential”, “restricted”, or “in confidence” and identified as such in writing. The parties shall hold in strictest confidence any of the other party’s confidential or proprietary information and not disclose such information to any third party without first obtaining the written consent of the other party.

B. Withdrawals of Proposals

Offerors may withdraw quotations by written notice via email received at any time before award. Quotations may be withdrawn in person by an offeror or his/her authorized representative if the representative’s identity is made known and the representative signs a receipt for the proposal before award.

C. Right to Select/Reject

FH India reserves the right to select and negotiate with those firms it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. FH India also reserves the right to reject any or all proposals received without explanation.

FH India reserves the right to appoint multiple agencies numbering more than one, if the situation so warrants, to carry out the project and hence the applicant should understand that the awarded contract may not be on exclusive basis.

D. Proposal Submission Requirements

Offerors should read the following proposal instructions carefully. All interested offerors must provide the following:

1. Technical Approach – indicating the following:

- a. Description of plan recommended to achieve the described scope of work.
- b. If the offeror has a website or can post examples of their work, please indicate the website. Do not send any materials with the proposal. They will be returned unopened.
- c. Include any objections to the terms and conditions and/or how they affect the technical approach.

2. Organizational Capabilities –

- a. Brief, general overview of organization.
- b. Description of any partner organization or subcontractor that you might contract with to do a portion of the scope of work, and a description of the division of level of effort and responsibility between your organization and the partner or subcontractor.
- c. **References:** Please include three client references and contact information. References should have worked with your agency within the past two years and specific to India (and if possible, subject matter) applicable to this RFP.

3. Staffing -Identify and list the key personnel who will be assigned to this activity. Include no more than a half-page biosketch of each of the key personnel. Provide brief descriptions of their capabilities and experience for conducting similar scopes of work as described above.

4. Past Performance – Provide 3-5 past performance examples of work performed that is similar to the work proposed in this RFP.

5. Please include organization documents i.e. incorporation certificate, PAN CARD, GST registration if any, copy of cancelled check with proposal.

E. Discussions and Award

FH India reserves the right to seek clarifications, enter into discussions or negotiations, or to make award on initial submissions without discussions or negotiations of any kind. FH India reserves the right to exclude from further consideration any proposal at any time, including after discussions or negotiations have been entered into.

F. Offer Verification

FH India may contact offerors to confirm contact person, address, bid amount and to confirm that the bid was submitted for this solicitation.

G. False Statements in Offer

Offerors must provide full, accurate and complete information as required by this solicitation and its attachments. At any time FH India determines that an offeror has provided false statements in the proposal, FH India may reject the proposal without further consideration.

H. Certification Of Independent Price Determination

A. The offeror certifies that--

(1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror, including but not limited to subsidiaries or other entities in which offeror has any ownership or other interests, or any competitor relating to (i) those prices, (ii) the intention to submit an offer, or (iii) the methods or factors used to calculate the prices offered;

(2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror, including but not limited to subsidiaries or other entities in which offeror has any ownership or other interests, or any competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated or competitive solicitation) unless otherwise required by law; and

(3) No attempt has been made or will be made by the offeror to induce any other concern or individual to submit or not to submit an offer for the purpose of restricting competition or influencing the competitive environment.

B. Each signature on the offer is considered to be a certification by the signatory that the signatory-

(1) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above; or

(2) (i) Has been authorized, in writing, to act as agent for the principals of the offeror in certifying that those principals have not participated, and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above;

(ii) As an authorized agent, does certify that the principals of the offeror have not participated, and will not participate, in any action contrary to subparagraphs (a)(1) through (a)(3) Above; and

(iii) As an agent, has not personally participated, and will not participate, in any action contrary to subparagraphs (a)(1) through (a)(3) above.

C. Offeror understands and agrees that --

- i. Violation of this certification will result in immediate disqualification from this solicitation without recourse and may result in disqualification from future solicitations; and
- ii. Discovery of any violation after award to the offeror will result in the termination of the award for default.

I. Reserved Rights

All RFP responses become the property of FH India, which reserves the right in its sole discretion to:

- Disqualify any offer based on offeror failure to follow solicitation instructions;
- Waive any deviations by offerors from the requirements of this solicitation that in opinion are considered not to be material defects requiring rejection or disqualification; or where such a waiver will promote increased competition;
- Extend the time for submission of all RFP responses after notification to all offerors;
- Terminate or modify the RFP process at any time and re-issue the RFP to whomever deems appropriate;
- Issue an award based on the initial evaluation of offers without discussion;
- Award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.

J. SUBMISSION OF PROPOSAL

Interested organizations are invited to submit their proposal (in PDF format) and budget (in excel) to hr@fhindia.org, by November 06, 2025. The required submission includes a brief proposal, with a budget along with proposed staff with their experience. Please mention the subject line - "Hiring Agency for Managing Processing of OPE Payments for Volunteers under the EMBED Project". All inquiries and requests for information related to this RFP must be submitted by e-mail to Mr. Neeraj Kumar Sinha, Human Resources and Compliance Officer at hr@fhindia.org not later than November 03, 2025, before 4:00 PM. FH India will not compensate offerors for any expenses related to preparation/ submission to this RFP.