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Request for Proposal (RFP)

Solicitation No.	RFP-FY17-01
Title:	Corporate Travel Management Services
Issue Date:	November 7, 2017
Closing Date:	November 28, 2017
Closing Time:	11:59 PM Eastern Time
Questions Due:	November 21, 2017
Award Start Date:	December 11, 2017

University Research Co., LLC (URC) is a global company dedicated to improving the quality of health care, social services, and health education worldwide. With our non-profit affiliate, the Center for Human Services (CHS), URC manages projects in over 45 countries, including the United States. Established in 1965, we offer a range of technical assistance to strengthen health and social systems and service quality by empowering communities and health workers to identify and scale up locally appropriate solutions to critical problems. URC focuses on finding ways to deliver proven approaches to health care problems, applying quality improvement (QI) methods, and conducting operations research to tailor those approaches to various settings. Internationally, URC expands access to and improves the quality of services addressing maternal, newborn, and child health; infectious diseases including HIV/AIDS, TB, and malaria; reproductive health and family planning; food and nutrition; and vulnerable children and families.

With URC's rapid and significant growth over the last 10 years and increased presence overseas, URC requires travel management services, which includes, but are not limited to, booking air tickets and hotel accommodations to all employees, consultants, and other company representatives.

1. RFP Process Timeline

The timeline for the RFP process is as follows. While we do not anticipate any changes to this timeline, we reserve the right to make adjustments to it as we see fit.

<u>Date</u>	<u>Action</u>
November 7, 2017	RFP distributed
November 21, 2017	Calls for bidders' questions
November 28, 2017	Bids are due
November 28-December 4, 2017	Evaluations
December 4, 2017	Selection
December 11, 2017	Award(s) made

2. Proposal Instructions

Please send your proposal via electronic mail for receipt **no later than November 28, 2017**. All proposals are to be submitted via e-mail for receipt **no later than 11:59 p.m. Eastern Time** to Brian-James Matibag (bmatibag@urc-chs.com). One or more vendors will be selected to provide this service.

Proposals must address and respond to all requirements set forth in the RFP. URC requires that the person signing your offer is authorized to execute the contract on behalf of your company. Late proposals will not be accepted.

The file attachment for the **Technical and Cost Proposal will be in PDF format**. The submission of attachments in any other format may result in disqualifying the offer.

Please note that the URC email server has a limitation of 10MB for the total attachments per single email. It is strongly recommended that the size of ALL attachments per a single email be less than 10MB.

The technical proposal and cost proposals should be submitted in separate emails. The subject line in the email should state **RFP-FY17-01 – Corporate Travel Management Services Technical** for the submission of the technical proposal and **RFP-FY17-01 – Corporate Travel Management Services Cost** for the submission of the cost proposal. Additionally, if the submission will be through several emails, please make sure all emails are sequentially numbered indicating the total number of emails that will be submitted (i.e. 1 of 4, 2 of 4, 3 of 4, and 4 of 4).

3. RFP Conditions and Changes

URC reserves the right to negotiate any or all RFP terms and conditions, and to cancel, amend or resubmit this RFP in part or entirety at any time.

This RFP is not an offer to contract, but represents a definition of specific requirements and an invitation to qualified Corporate Travel Management Companies to submit a response addressing our business requirements. Issuance of the RFP, your preparation and submission of a proposal, and subsequent receipt and evaluation of your proposal by URC does not commit URC to award a contract to you or any other respondent, even if all requirements stated in the RFP are met. All costs of participation including your proposal and subsequent activity in the selection phase are at your risk and any such costs, whether direct or indirect, will not be reimbursed by URC.

Nothing in this document shall be construed as an offer by URC and no terms, discussions or proposals shall be binding on either party prior to execution of a definitive agreement. URC reserves the right to reject any part or the entire proposal.

URC intends to issue a one (1) year contract to one or more vendors with an option to renew at the end of the term. Awards shall only be made to “responsible” prospective offerors. To enable URC to make this determination, the offeror must briefly describe within the proposal that the offeror:

- Has adequate financial resources;
- Able to comply with the required or proposed delivery or performance schedule, taking into consideration all existing commercial and governmental business commitments;
- Has a satisfactory performance record;
- Has a satisfactory record of integrity and business ethics;
- Has the necessary technical capacity, equipment and facilities, or the ability to obtain them; and
- Is qualified and eligible to receive an award under applicable laws and regulations of the United States

Proposals are expected to be binding for a period of **one hundred eighty (180)** days from the published response date.

Proposals submitted in response to this RFP will not be returned. Reasonable efforts will be made to ensure confidentiality of both Cost and Technical Proposals received from all Offerors. This RFP does not seek information of a highly proprietary nature, but if such information is included in the Offeror's proposal, the Offeror must alert URC and must annotate the material by marking it "Confidential and Proprietary" so that these sections can be treated appropriately.

The Technical Proposal and Cost Proposal must be kept separate from each other. Technical Proposals must not make reference to cost or pricing data in order that the technical evaluation may be made strictly on the basis of technical merit.

4. Non-Disclosure and Confidentiality

The terms of this RFP and all associated information sent to you by us are proprietary and confidential. These materials are to be used by you solely for the purpose of responding to this RFP.

All information disclosed by URC regarding this Request for Proposal and during any subsequent negotiations shall be considered confidential information. Suppliers shall agree to hold such information in strictest confidence, and will not use or disclose such information to any third party without prior consent from URC.

5. URC Travel Policy

Airfare

Economy class is the prescribed class of travel for all employees and consultants. If a less costly fare than economy is available that meets the traveler's business schedule, then the lower priced airfare must be used. Travelers are expected to fly at the lowest economy airfare, without consideration to airline preference or frequent flyer program benefits.

For International Travel, a rest stop of up to twenty-four (24) hours is allowed if continuous travel between the originating departure point and the ultimate arrival point is in excess of fourteen (14) hours.

In cases where the scheduled flight time is in excess of fourteen (14) hours and the employee/consultant is expected to report to duty the following day or sooner, business class air travel is allowable in lieu of a rest stop pending approval by an authorized company officer as well as if the budget and contract or cooperative agreement allow. The fourteen (14) hour travel time is defined as the scheduled flight time on the most expeditious routing available from the point of origin to scheduled arrival at the point of destination, including scheduled stopovers. It does not include rest stops or travel from a residence or hotel to the airport. Business class travel may be authorized to accommodate medical disability or other special need by providing a current certification by a competent medical authority.

Authorization for business class travel must be made by a member of the C-Suite or designee and should be accompanied with relevant back-up documentation.

Similar to business class air travel, where the scheduled flight time is in excess of 14 hours and the employee/consultant is expected to report to duty the following day or sooner, the use of upgraded or preferred coach seating options including, but not limited to, "Coach Elite," "Coach Plus," and "Preferred Coach" may be authorized by the division Vice President and is subject to budgetary and contractual limitations. Without this authorization, any upgrade to the class of air travel is considered a traveler's personal choice and is therefore incurred at the traveler's personal expense.

Scheduled flight time includes scheduled non-overnight time spent at airports during plane changes. Scheduled non-overnight time does not include time spent at the originating or ultimate arrival airports.

In accordance with the "Fly America Act", international air travel financed with U.S. Government funds must be on a certified US flag carrier or a US code share partner to the extent such service is available. In an instance when neither is available and the trip cannot be rescheduled, written justification for the use of another carrier must be noted and included as back-up on the Travel Expense Statement.

In the case of a Cooperative Agreement, Contract or Grant which expressly incorporates the "Open Skies Agreement" between the United States Government and the European Union (EU), the use of an EU airline may be authorized with the approval of the Vice President of Contracts and Grants Administration

(V.P. Contracts) or designee. The Open Skies Agreement, when authorized, allows travelers to use any EU carrier, in lieu of a U.S.-flag carrier, provided that the basis for the exception is properly documented. Documented exceptions should be approved by the Business Unit Senior Vice President or his/her designee.

As the "Open Skies Agreement" has not been universally incorporated into all URC projects, it is critical that a traveler confirm with the V.P. Contracts whether it is included in the relevant project contractual documentation and obtain the necessary approval before booking the tickets. Failure to do so can result in the ticket being disallowed and its cost being recovered from the traveler.

Hotel Accommodations

Lodging expenses are reimbursed based on actual expenses up to the maximum allowed for the location as determined by the GSA for CONUS travel or by the Department of State for foreign travel (see links referenced above). Please note that the GSA rates for domestic (CONUS) lodging are exclusive of taxes while the State Department's foreign lodging rates are inclusive of all taxes and mandatory service charges.

Lodging rates are based on the single room rate. One-half of a double occupancy charge is allowable to each employee in instances where they share the same room. When claiming reimbursement under this scenario, each employee must include a note explaining the arrangement as part of the documentation for the Travel Expense Statement.

Original itemized receipts, bills and invoices for Lodging must be retained and submitted as back-up with an employee's Travel Expense Statement, even in those instances when the lodging was paid for directly by the Home Office or a Field Office.

Under three types of circumstances, and with the written approval of the Vice President or Corporate Department Director, lodging expenses in excess of the stated maximum rate for the location will be considered allowable and will be reimbursed. The circumstances for which lodging rates in excess of the State Department/GSA maximum rates are considered allowable and reimbursable are when:

- 1) Lodging is procured at a prearranged place such as a hotel where a meeting, conference or training session is held;
- 2) Costs have escalated because extraordinary circumstances such as special events (e.g., missile launching periods, sporting events, World's Fair, conventions, natural or manmade disasters, etc.); lodging and meal expenses within prescribed allowances cannot be obtained nearby; and costs to commute to/from the nearby location consume most or all of the savings achieved from occupying less expensive lodging;
- 3) Due to safety and security concerns, it is necessary to obtain lodging in a hotel whose rates are above the stated maximum.

In all of these instances, the maximum lodging amount that will be reimbursable and deemed allowable cannot exceed 300% of the applicable maximum lodging rate.

Note 4: To obtain approval from a Vice President or Corporate Department Director for exceeding the stated maximum lodging rate under one of the preceding criteria, please use the Excess Lodging Authorization Form (Attachment A) contained at the end of the Travel and Business Expense Policy.

Note 5: For any other circumstance, written approval of the Vice President or Corporate Department Director is required for reimbursement of lodging expenses in excess of the stated maximum rate for the location in question. The difference must be put to a project non-billable account or, in cases of non-project related travel, to a corporate unallowable account.

6. Scope of Work

The Offeror shall provide corporate travel services for official domestic and international travel for URC staff and consultants. The corporate travel services include:

- **General:** The Offeror shall maintain procedures to continually monitor the quality of travel services, with the goal of providing and maintaining the highest level of customer service/satisfaction
- **Ticket Issuance:** The Offeror will issue electronic tickets for the traveler or authorized representative for air, rail, car, shuttles, boats, etc. Tickets and travel documents will be available in accordance with the standard agreed to with the Offeror, but no less than two days before the date of departure. Under no circumstances will the Offeror release a ticket to a traveler without proper approval.
- **Voids and Refunds:** The Offeror will void tickets where possible to avoid a charge to URC. Where complete refunds are obtained, the Offeror will process the refund within the reporting week. The Offeror will process partial refunds requiring a fare calculation as expeditiously as possible and within thirty (30) calendar days of receipt;
- **Unused Non-Refundable Tickets:** The Offeror will provide URC with a report showing all unused non-refundable tickets. The Offeror will put the value of the unused non-refundable ticket to the traveler's profile and will adopt procedures to assist travelers using the value of such tickets on a future official travel;
- **Lodging Accommodations:** The Offeror shall book lodging accommodations for the traveler in accordance with the criteria and regulations set forth by URC and the funding entity. In most cases, daily lodging amounts are subject to the maximums set forth in the Department of State Standardized Regulations (DSSR);
- **Travel Tracking:** The Offeror must have SABRE and a process of booking travel through SABRE. URC has a contract with iJet to provide travel tracking services for the staff and consultants.
- **Passport and Visa Service:** The Offeror shall assist the traveler in obtaining passports and visas required for official travel;
- **Group Travel Benefits:** The Offeror must provide group travel benefits to URC;
- **Hours of Operation:** The Offeror shall provide a dedicated representative and/or team to URC and shall offer full services from **Monday to Friday, 8:00am to 6:00pm**, except on federal holidays. During off business hours, the Offeror shall provide a direct phone number for official and emergency travel (no general toll free numbers);
- **General Requirements for Personnel:** The Offeror's personnel must have experience booking travel for the United States government and/or United States government contractors. He/she must be familiar with the federal travel regulations. Additionally, all staff assigned to the URC account shall be fluent in oral and written English;
- **Billing:** The Offeror shall ensure that all transactions are allocated to a billing code (provided by URC). These billing codes must be present in the invoices submitted to URC.
- **Service Performance Quarterly Meetings:** The representative from the Offeror will attend the quarterly meetings with the URC Travel Representative to discuss aspects for the service performance (i.e. customer satisfaction, service levels, standards, compliance, etc.). The goal of these meetings is to identify overall trends and opportunities to improve services and to agree on corrective action plans as needed.
- **Management Information Reporting System:** The Offeror shall provide a management information reporting system capable of managing traveler profiles and cost information, and billing nuances. The Offeror shall produce reports as specified by URC on an as needed basis.

7. Proposal Content

Although generalized promotional literature is welcomed, it may not substitute for original narrative responses to the questions posed below. URC reserves the right to disqualify any proposal for lack of responsiveness or specificity.

Please provide original narrative responses to the following in the following format:

1. Cover page
 - a. Solicitation number;
 - b. Company name;
 - c. Company address;
 - d. Name of company's authorized representative;
 - e. Contact information (phone and e-mail);
 - f. Validity of proposal;
 - g. Signature, name, title and date;

2. Technical Proposal
 - a. Provide an overview of the Offeror and the services offered;
 - b. Provide a map and narrative on the global presence of the Offeror (e.g. office branches, partners, etc.);
 - c. Provide a narrative of the Offeror's experience in this field and provide a list of current and former clients;
 - d. Provide a narrative on your travel reservation process;
 - e. Provide a narrative on how the Offeror will operationalize the tasks and requirements set forth in the Scope of Work (Section 6). There should be a section for each of the tasks noted in Section 6;
 - f. Provide a narrative on how the Offeror can differentiate itself from competitors;
 - g. Provide the resume(s) of the dedicated travel agent(s) assigned to URC. The dedicated travel agent(s) must have a minimum of 4 years' experience working with United States government contractors.

3. Provide at least 3 references to provide information about past performance in a relevant capacity, which includes email addresses, names and position title of references, company name, and phone number(s).

4. Cost Proposal

Please provide the following pricing details and include any additional or ancillary costs that URC would incur. Provide a narrative describing the pricing details as well as any other relevant information. You can use a separate table if you need more space.

Item No.	Item Description	Service Fee Applied (Unit Price)
1	Domestic Flights	
2	International Flights	
3	Rail or other Modes of Transportation	
4	Re-issuance	
5	Refund	
6	Cancellation Within Reporting Period	
7	Hotel Accommodations	
8	Visa Issuance	
9	Passport	

6. Evaluation Criteria

Proposals will be evaluated according to the responsiveness of their technical proposal and that the proposal demonstrates a full understanding of the work that needs to be performed as well as a clear straightforward approach to achieving the objectives. Offers must also be able to demonstrate experience in providing services to similar organizations in a similar capacity.

The review of the cost proposal shall include cost realism. This process will include a review of the cost portion of the Offeror's proposal to determine if the overall costs proposed are reasonable and realistic for the work to be performed, if the cost reflects that the Offeror understands the requirements, and if the costs are consistent with the technical part of the proposal.