



UNIVERSITY RESEARCH CO., LLC

5404 Wisconsin Avenue, Suite 800
Chevy Chase, MD 20815-3594
TEL 301-654-8338
FAX 301-941-8427
www.urc-chs.com

Request for Proposal (RFP)

Solicitation No. RFP-FY19-GS01

Title: Travel Assistance Services

Contracting Entity: University Research Co., LLC (URC)

Release Date: Tuesday, 29 January 2019

Deadline for Questions: Sunday, 03 February 2019; 11:59 PM (Eastern Standard Time)

Deadline for Bids: Sunday, 17 February 2019; 11:59 PM (Eastern Standard Time)

Award Start Date: Wednesday, May 1, 2019

Section 1: Instruction to vendors

Introduction

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 global presence overseas, URC has a high number of staff and consultants travelling on its behalf, (in excess of 1,000 personnel globally), conducting approximately 1,500 trips per year. These individuals require certain travel assistance services including (but not limited to) security, medical and insurance solutions, support in ensuring their safety, security and well-being before, during and after their travel.

1. RFP Process Timeline

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

<u>Date</u>	<u>Action</u>
29 January	RFP release date
03 February	Questions due
17 February	Bids due
18 February – 1 March	Evaluations, demos and selection
06 March	Award(s) made

2. Proposal Instructions

Please send your proposal via electronic mail for receipt **no later than Sunday, 17 February 2019**. All proposals are to be submitted via e-mail for receipt **no later than 11:59 PM (Eastern Standard Time)** to Daniel DeLacy at travelassistanceservices@urc-chs.com. Late proposals will not be accepted.

Proposals must address and respond to all requirements set forth in the RFP. If a vendor does not offer one or more of the listed services, please state clearly which are not provided and give specific details on those which are. If a single vendor is not able to provide all of the listed services, more than one vendor may be selected to jointly provide these services. URC requires that the person signing the offer is authorized to execute the contract on behalf of the vendor.

The technical proposal and cost proposals should be submitted in separate emails. The subject line in the email should state “RFP-FY19-GS01 – Travel Assistance Services Technical” for the submission of the technical proposal and “RFP-FY19-GS01 – Travel Assistance 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).

The file attachment for the technical proposal will be in MS Excel format. Please complete the provided MS Excel workbook and submit as an attachment. Please submit the cost proposal in PDF format. The vendor must also provide the letter of transmittal (see section 3) and attachments, as requested in the technical proposal. You may include other relevant supporting documentation. 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.

3. Questions and clarifications

All questions and/or clarifications regarding this RFP must be submitted in writing no later than **Sunday, 03 February 2019; 11:59 PM (Eastern Standard Time)**. All correspondence and/or inquiries regarding this solicitation must reference the “RFP-FY19-GS01”. Questions and requests for clarification, and the responses thereto will be circulated to all RFP recipients who have indicated an interest in bidding.

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. 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.

6. Evaluation Criteria

Proposals will be evaluated on the basis of their understanding and interpretation of the services required (as detailed in the section proposal content). In addition to an assessment of service delivery capabilities, price and past performance are of equal importance for the purposes of evaluating and selecting the “best value” proposal.

7. Validity Period

Offers must remain valid for not less than forty-five (45) calendar days after the offer deadline.

8. Negotiations

Best offer quotations are requested. It is anticipated that awards will be made solely on the basis of these original quotations. However, URC reserves the right to conduct negotiations and/or request clarifications prior to awarding a contract.

9. Contract period

The expected period of this agreement will commence 1 May 2019 and extend for one year, with an option to renew for an additional 1-year period.

10. Terms and Conditions

Any award as a result of this RFP will be subject to URC's standard terms and conditions.

11. 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 RFP and during any subsequent negotiations shall be considered confidential information. Vendors shall agree to hold such information in confidence and will not use or disclose such information to any third party without prior consent from URC.

Section 2: Proposal content

Please provide original narrative responses to the following:

1. Company information

- Company name
- Company address
- Name of company's authorized representative
- Contact information (phone and e-mail)
- DUNS number
- Validity of proposal
- Signature, name, title and date
- Provide a brief overview of your company including: years in business, number of employees, total number of clients, and a description of your international client base and operations.
- List what you consider to be the areas that differentiate you from your competitors (both advantages and disadvantages).
- Provide details of any third parties or vendors involved in the provision of the requested services.
- Give details of any formal certifications and compliance with global data requirements

2. Technical Proposal

(To be answered in an attached MS Excel workbook)

Service		Question
1. 24/7 hotline giving medical response and assistance services	1.1	Do you provide a 24/7 hotline giving medical response and assistance services?
	1.2	If yes, provide details of all the assistance services provided
	1.3	Give details of your global assistance network, including number and location of call centers
	1.4	Outline the availability of 24/7 access to medical and security experts
	1.5	Give details of any countries in which you are unable to offer assistance
	1.6	Explain whether you provide referrals for travelers
	1.7	Give details on how medical provider/facility information and their services is shared (e.g. website, app, hotline, SMS)
	1.8	Describe the different types of medical providers, how you vet your medical provider network and how the network is maintained
	1.9	Describe your philosophy on client involvement in assistance cases
2. Medical evacuation	2.1	Do you provide medical evacuation and repatriation services?
	2.2	If yes, describe the case management process, including managing emergency medical evacuations and access to air ambulances
	2.3	Describe your evacuation/repatriation capabilities on all continents, including number and location of assets and personnel, and highlighting countries where you are unable to make evacuations

	2.4	Describe your protocol and decision-making processes to determine whether an evacuee will need air ambulance, doctor escort, nurse escort, family escort.
	2.5	Explain how you determine whether a case needs medical transport versus commercial flight
	2.6	State whether medical evacuation can include cases of mental health concerns
3. Security evacuation services	3.1	Do you provide security evacuation services?
	3.2	Describe the process for evacuation in the event of e.g. political or civil unrest, including the methodology to determine when it is time to evacuate and the associated decision-making process
	3.3	Provide two case studies (in attachment) in which you effectively assisted a client in evacuating employees.
4. Repatriation of mortal remains	4.1	What are the benefit limit options (in US \$) available for repatriation of mortal remains?
	4.2	Provide details on the process for repatriation of mortal remains, including legal processes involved and coordination with family members
	4.3	Ability to repatriate other than the individual's home of record
	4.4	Accommodation and coordination for religious rites/observances
	4.5	Provide details of medical evacuations/repatriations for the last fiscal year, by continent and type of transport (commercial versus medical transport)
5. Security briefings for travelers	5.1	Do you provide a security briefing for traveler pre-departure?
	5.2	If 'Yes' please provide details of the specific content of the briefing
	5.3	Explain how the content is collated
	5.4	Describe capability to tailor content, to include company specific or additional information in the briefing
	5.5	Provide sample briefing in an attachment
	5.6	Describe the methods used to deliver/communicate briefings to travelers
	5.7	Explain whether travelers are required to create a profile in order to receive briefings and/or alerts
6. Country/city risk rating process	6.1	Do you provide country/city/location risk ratings?
	6.2	If so, what type of risk/threat ratings do you provide and what areas do they cover? (e.g. political, health, etc)
	6.3	Explain how you determine your country/city risk ratings
	6.4	Can these ratings be modified by our company? If so, are these changes reflected in content to travelers?
	6.5	Explain the review process for risk/threat ratings and its frequency
	6.6	How many countries are on your highest rating? Provide a list as an attachment
	7.1	Do you provide incident alerts/advisories during travel?

7. Real time incident alerts/advisories and analysis	7.2	If yes, please provide some examples of types of incident alerts and advisories
	7.3	Define the categories and scope of threats that are monitored
	7.4	Provide metrics on the number of alerts by category, severity, and region over a 12-month period.
	7.5	Give details of how threats are monitored (information sources) and alert content is collated
	7.6	Describe processes for ensuring information is timely and accurate
	7.7	Explain how contradictions in information is managed
	7.8	Describe the methods used to deliver/communicate incident alerts/advisories
	7.9	Explain whether alerts/advisories can be targeted for distribution to a specific audience (i.e. those with upcoming or current travel to a destination)
	7.10	Describe how you avoid sending alerts to travelers that are not relevant to their location
	7.11	Describe the extent to which travelers can customize alert preferences
	7.12	Describe any additional special reports/in depth analysis you provide and include examples as an attachment
	7.13	Give details of the number of analysts employed, their locations and experience
	7.14	Describe the access we will have to analysts and/or other industry experts
	7.15	List examples of times you have successfully forecast disruptions like political or civil unrest. How were these successes achieved?
8. Global tracking and visual mapping of travelers and assets.	8.1	Do you provide tracking of travelers and/or assets?
	8.2	If yes explain the process required to enable tracking of travelers
	8.3	Describe your system capability to identify travelers by airline flight number (including code share), those impacted by a specific threat, specific location and PNR.
	8.4	Describe your system capability to identify different types of traveler (e.g. VIP, contractors, consultants, expats, TCNs)
	8.5	Explain the extent to which tracking is 'real time'
	8.6	Explain how emergency contact information is incorporated, stored and presented
	8.7	Describe how travelers can be contacted directly via your system
	8.8	Describe the ability of your system to capture images and documents related to a traveler
	8.9	Describe the user interface for tracking and mapping, including mapping capability
9. Travel data integration	9.1	Does you interface allow for integration with our travel service providers?
	9.2	Describe the methods used to collect and integrate travel data. State whether you collect it direct or use a third-party aggregator
	9.3	Explain the process for integrating travel agency bookings, addressing cancellations/updates, multiple bookings/tickets for the same trip and multiple people on the same PNR.

	9.4	Give details about whether your company can integrate data from other sources and/or whether information can be manually entered.
10. Mobile app	10.1	Do you provide a mobile app?
	10.2	If yes, describe its features (languages, information provided, log-in features, automatic dial to 24/7 assistance service, etc)
	10.3	Give details about whether the app has a global check-in feature that sends the traveler's GPS coordinates to your travel tracking system
11. Sickness and accident/emergency coverage	11.1	Do you provide insurance coverage for sickness and accident/emergency?
	11.2	What are the benefit limit options (in US \$) available for sickness and accident/emergency (i.e. both non-evacuation and evacuation situations)? Provide details of any deductible, Out-of-Pocket costs, or co-insurance payments.
	11.3	Please state if these limits are per incident, per given periods, or any other term.
	11.4	State whether sickness and accident/emergency coverage includes, (but may not be limited to), medically/surgically necessary treatments, services, prescriptions and supplies; hospital services; local ambulance; x-rays; laboratory fees; and visits to a physician's office (non-emergency)
	11.5	Give details about coverage for emergency prescription refills
	11.6	Give details about short-term hospitalization and/or recuperation services and where are options for private/semi-private rooms
	11.9	Provide details of how payments to facilities will be coordinated/made
12. Dental emergency benefit	12.1	Do you provide dental coverage?
	12.2	What are the benefit limit options (in US \$) available for dental emergency?
	12.3	Please state if these limits are per incident, per given periods, or any other term.
	12.4	Dental Emergency coverage include, but not limited to, immediate relief of dental pain; prescriptions; supplies; and other services such as medically-necessary labs, x-rays, etc.
	12.5	Deductible or Out-of-Pocket costs
	12.6	Details of how payments to facilities will be coordinated/made
13. Accidental Death & Dismemberment (AD&D)	13.1	Is this benefit included or is it an optional add-on?
	13.2	What are the benefit limit options (in US \$) available for AD&D?
	13.3	Provide covered losses and amounts payable
14. Coverage for additional individuals / family members	14.1	Can staff extend coverage for travelling family members/individuals?
	14.2	As premium costs will be paid by staff, explain enrollment/billing process
15. Exclusions & Limitations	15.1	Provide details of all exclusions and limitations that may be applicable to these policies/coverages

16. Coordination with Other Insurance Carriers	16.1	Do you work with insurance carriers (Worker's Comp, In-country Health Insurance, etc.) for coordination of care and payment of costs.
	16.2	Describe your fee structure for assistance cases, including details of any case fees or markups to third parties
	16.3	Describe whether you work with insurance carriers for direct payment of case costs. If so, are there any insurance carriers you do not work with?
	16.4	State whether you offer direct payment for cases, and/or whether there are countries where you do not have the ability to pay directly
17. Reporting functionality and notifications	17.1	Do you provide a reporting functionality?
	17.2	If yes, describe your system's reporting capabilities and your ability to automate the reporting process. How are reports delivered and in what formats?
	17.3	Describe your approach for notifying Global Security/travel manager or other authorized staff when travel is booked to a high-risk destination.
18. E-learning training (safety and security awareness) for staff prior to travel.	18.1	Do you provide eLearning training to travelers?
	18.2	If yes, please provide details of the content of the eLearning
	18.3	Explain how eLearning is disseminated, whether participation is tracked and assessed.

3. Implementation

Provide an overview of the implementation plan and timeline for the services being proposed, noting how you will support URC, what points of contact there will be, availability of training, assigned account manager, technology support, etc.

4. Past performance

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).

5. Compliance questions

Please provide responses to the following questions:

1. Has your organization implemented a formal risk assessment program to proactively identify information technology risks?
2. Do you conduct risk assessments of your third parties?
3. Have these third parties signed data confidentiality and non-disclosure agreements?
4. Is there an Information Security policy (and supporting documentation) which is maintained, reviewed, and signed off in the last 12 months?
5. What position coordinates the information security program throughout your organization?
6. Is there a Privacy policy (and supporting documentation) which is maintained, reviewed, and signed off in the last 12 months?

7. Does your organization perform background checks/screening on employees that include criminal, credit, professional and/or references on all full-time applicants and contractors prior to hiring?
8. Do you have security awareness training in place for employees? If yes, what is the frequency of the training?
9. Does your organization have an acceptable use policy that governs how employees can access and use company-supplied assets, such as email, computers, mobile devices?
10. Does your organization have a documented information data classification policy?
11. Does the company have a data lifecycle management process addressing the secure disposal of electronic storage media (e.g. hard drives, optical media, etc.) and hard copy data (e.g. pulping and shredding)?
12. Do you have a Physical Security policy?
13. How do you protect/restrict physical access to your offices and data centers?
14. Are anti-virus/malware technologies installed on all end user computers and all production servers?
15. Are all inbound/outbound email and application communications scanned for viruses, SPAM, and malware?
16. Do the applications that store or process data use encryption to protect information in transit and in storage?
17. Does your organization have a formal password policy? Detail the minimum password requirements for length, change interval, complexity, etc.?
18. How often does your organization review user access rights/access privileges to systems, applications, and networks?
19. Is remote access secured, such as via a VPN?
20. Does remote access require two factor authentication?
21. How is the wireless network secured?
22. How often is penetration testing performed on internet facing infrastructure and in scope applications? Can you provide the most recent version or a summary report?
23. Do you have a disaster recovery plan? Do you test it? How and how often?
24. Is there an incident response policy and procedure in place for incidents involving unauthorized access or use of personal information?
25. Have you ever had a security breach of your system? If so, when? Please describe the cause and your company's response.

6. Cost Proposal

Please provide the pricing details for the requested services and include any additional or ancillary costs that URC could incur. Where possible, please break down the costs per service. All prices should be quoted in U.S. Dollars.

Section 3: Letter of transmittal

The following letter must be completed and submitted electronically with any offer:

To: URC
Attention: Daniel DeLacy

Subject: Offer from Company Name
Reference: RFP-FY19-GS01
Date: (insert date)

Company Name hereby proposes the attached offer to perform all work required to complete the scope of work as described in the above-referenced RFP. Please find attached our detailed offer, as called for in the RFP.

We hereby acknowledge and agree to all of the terms and conditions, special provisions, and instructions included in the above-referenced RFP. We further certify that Company Name, as a firm—as well as the firm’s principal officers and all commodities and services offered in response to this RFP—are eligible to participate in this procurement under the terms and conditions of this solicitation and under donor regulations and are currently not excluded from federal procurement or non-procurement programs.

We hereby certify that the enclosed representations, certifications, and other statements are accurate, current, and complete.

(insert company name)
Company Name

(insert name and title)
Name and title of authorized representative

Signature

(insert date)
Date