



RFP Solicitation Number:
BOSS-RFQ-005-2018-TRVL

Date: 20 September 2018

Request for Proposal: Travel Services





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1 Introduction

1.1 Purpose

Social Impact (SI) seeks information on travel services and is requesting proposals from qualified offerors. SI requests that all offerors examine the specific requirements in this RFP and prepare responses pursuant to the terms contained herein.

SI is soliciting proposals that illustrate cost buildup, service delivery, and methodology for a range of travel services, including airfare ticketing, hotel booking, car services, visa facilitation, and ticketing of other modes of travel such as trains and ferries. **The award will be for a one-year contract, renewable for an additional year depending on performance.**

1.2 Background

SI is a Washington, DC-area international development management consulting firm. SI's mission is to help global development organizations and programs be more effective at improving people's lives. We provide a full range of management consulting, technical assistance, and training services to strengthen international development programs, organizations, and policies. We provide services globally in the areas of monitoring and evaluation, strategic planning, project and program design, organizational capacity building, and gender and social analysis. SI services cross-cut all development sectors including democracy and governance, health and education, the environment, and economic growth. SI's clients include U.S. government agencies such as USAID, the Millennium Challenge Corporation, and the U.S. Department of State; bilateral donors; multilateral development banks; foundations; and non-profits.

1.2.1 What We Do:

Impact Evaluation: Using quantitative and qualitative methods, we measure the impact of global development programs.

Performance Evaluation: We evaluate activities, outcomes, and processes to improve the performance of global development projects.

Strategy, Performance & Capacity Building: We provide a comprehensive suite of management consulting tools to strengthen the performance of global development organizations.

Training: We are a global leader in performance and strategy-related training. We deliver innovative monitoring and evaluation training programs to multiple United States government agencies, foundations, and NGOs.

1.2.2 Additional Information

Social Impact's revenue for 2017 exceeded \$42 million. Airfare and hotel volume for the prior three calendar years exceeded \$600,000. We anticipate similar revenue and expenses for the foreseeable future.

About 400 people work for Social Impact around the world in a given year. This includes a mixture of headquarters staff, field office staff, and consultants. Most of them travel at least once per year; over 450 itineraries were booked in a one-year period from 2017 to 2018.

Social Impact has long-term field offices in eleven countries, and typically sends travelers to over 100 countries for short term assignments—most of it in developing countries and emerging markets.

2 Proposal Preparation Instructions

2.1 Process and Timeline

The following dates are for informational and planning purposes. The term COB means **5:30 PM** Eastern Standard Time (EST). SI reserves the right to change any of the dates and times. If changes are made, SI will contact all interested offerors.

RFP Schedule	Date
RFP Release	09.20.2018
Written Questions (due by 5:30 p.m. EST)	09.27.2018
Written Questions Answered and provided to all Bidders	10.04.2018
Proposals Due (due by 5:30 p.m. EST)	10.25.2018
Interview Finalists	11.08.2018
Selection of Finalist(s)	11.13.2018
Notify Selected Service Provider & All Bidders	11.16.2018

2.2 Procurement-Related Communications

All questions, inquiries, and requests for clarification must be submitted in writing to the designated contact listed below no later than **September 27th, 2018**.

Questions submitted to SI after this period will only be answered if SI determines the question is critical to the success of the RFP process. Responses to all questions will be circulated to all offerors.

Point of Contact	
Name	Matthew Hearn
Title	Deputy Director, Business Operations
Email	rfp@socialimpact.com

Offerors shall not contact SI staff outside the written communication channel described above unless authorized by SI.

SI may, at its sole discretion, contact vendors for in person or verbal briefings or discussions.

Vendors may notify SI of any discrepancies, errors, or omissions that may exist within this RFP. With respect to this RFP, vendors may recommend to SI any enhancements, which might be in SI's best interests.

2.3 Right to Reject Proposals

Issuance of this RFP in no way constitutes a commitment by SI to award a contract. SI reserves the right to reject any or all proposals or portions of proposals received in response to this RFP, to request modification or clarification of any part of a proposal, or to cancel this RFP if it is in the best interest of SI to do so. SI may reject any proposal if it is considered incomplete or conditional, contains irregularities, or does not meet qualifications, requirements, or specifications. Failure to furnish all information may disqualify the proposal.

2.4 Ownership of Proposals

Proposals and any other materials submitted to SI in response to this RFP will become the exclusive property of SI upon receipt and will not be returned.

SI is not liable for any costs incurred as a result of responding to this Request for Proposals.

SI expects to select one firm to provide travel management services for the entirety of its operations. SI anticipates that the agreement will run for **12 months with the option to extend for an additional year based on performance**. SI expects to sign a service agreement with the winning bidder laying out the conditions of the agreement.

In responding to this RFP, the vendor accepts full responsibility to understand the RFP in its entirety, and in detail, including making any inquiries to SI as necessary to gain such understanding. SI reserves the right to disqualify any vendor who demonstrates incomplete understanding. Further, SI reserves the right to determine, at its sole discretion, whether the vendor has demonstrated such understanding. That right extends to cancellation of award, if award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to SI.

2.5 Good Faith Statement

All information provided by SI in this RFP is offered in good faith. Individual items are subject to change at any time. SI makes no certification that any item is without error. SI is not responsible or liable for any use of the information or for any claims asserted there from.

SI will make a good faith effort to provide a written response to questions and requests for clarification that requires addenda by **October 4th, 2018**. All questions, answers, and addenda will be shared with all bidders directly.

2.6 Proposal Submission

Vendors must send proposals in electronic copy via e-mail, on or prior to **October 25, 2018 5:30 EST** to: rfp@socialimpact.com.

Each Proposal should provide a straightforward, concise description of the agency's ability to meet the requirements of this RFP. Proposals should be limited to **20 pages** plus annexes and should not contain unsolicited, extraneous or duplicative information. A proposal may be considered non-responsive if information is either conditional or incomplete, or if it contains extraneous material. Proposals must be based solely on the requirements contained in this RFP.

By submitting a Proposal, the Agency grants SI the right to obtain any information from any lawful source regarding (i) the past history, practices, conduct and ability of Agency to perform the services and otherwise to fulfill the requirements under this RFP, and (ii) the past history, practices conduct and ability of any director, officer, or key employee of Agency.

2.7 Criteria for Selection

The evaluation criteria used in the selection process will include but is not limited to the following considerations:

1. Proposals will first be reviewed on a Pass/Fail basis. Proposals not meeting the following requirements may be rejected as non-responsive:
 - a. Proposal must be electronically submitted by the deadline for the submission of the Proposal;

- b. Proposal must include complete details as outlined in the Request for Agency Corporate Information;
 - c. Proposal must follow the Response Format.
- 2. Proposals passing the first step will be evaluated based on the following criteria:
 - a. Implementation Approach (20%),
 - b. Account Management and Service Delivery (10%),
 - c. Agency Systems and Operational Configuration (20%),
 - d. Value for Money (20%),
 - e. Past Performance and References (20%),
 - f. Billing (5%),
 - g. Reporting (5%).

Selection and Notification

SI will select a service provider based on the best value approach. SI will focus on selecting the offeror that presents the most advantageous proposal to SI, when price and other factors are considered. While SI's preference is to contract small businesses for this type of service, final determination will be made based on the scope of services on offer and how they align with SI's current and evolving needs.

Proposal and Due Date

Proposals are due by COB **October 25th, 2018** and should be sent to rfp@socialimpact.com. Electronic proposals are preferred. Respondents are not to contact any SI staff or field office directly with queries. Below are questions to be included in the proposal submission. Please clearly reference the questions in the submission.

3 Agency Profile

3.1 Profile

Please provide the following information:

- Full name of the corporate entity placing the bid,
- Company address,
- Telephone,
- Contact Name,
- Email,
- Background,
- Year of Establishment,
- Corporate History,
- Corporate Philosophy.

3.2 Other Information

Provide organizational charts for:

- (1) company;
- (2) primary location, branch, or division of the company that will be providing services to SI.

4 Company/Agency Overview

1	What is the client mix by air and hotel sales dollar volume for your entire company ?	Under \$4,999,999: # of Customers _____ \$5M-\$14,999,999: # of Customers _____ Over \$15,000,000: # of Customers _____
2	What is the client mix by air and hotel sales dollar volume for the primary location, branch, or division that will be servicing our account?	Under \$4,999,999: # of Customers _____ \$5M-\$14,999,999: # of Customers _____ Over \$15,000,000: # of Customers _____
3	What percentage of your total company air and hotel sales dollar volume is represented by accounts with air spend of \$1 MM & under?	_____% (If significantly different for location servicing account, please specify _____%)
4	List no more than (3) key differentiators between your company and other competitors providing travel services.	Your Response Here
5	Describe your agency experience servicing consulting firms or other U.S. based organizations with international operations.	Your Response Here

6	Describe your agency experience servicing clients, like Social Impact, that are required to comply with U.S. Government travel regulations, i.e. Federal Travel Regulations, Fly America Act, and the Open Skies Agreement.	Your Response Here
7	Describe your agency's process for documenting non-Fly America Act compliant flights.	Your Response Here
8	Describe your 24-hour emergency service and your ability to assist travelers globally. Does this type of service come at additional cost?	Your Response Here
9	SI has an institutional practice of engaging small businesses, whenever possible, to include small business, veteran-owned small business, service-disabled veteran-owned small business, HUBZone small business, small disadvantaged business, and women-owned small business. Is your agency considered one of the above?	Your Response Here

5 Implementation

1. If your organization is successful in being awarded SI's travel services contract, explain how you would implement services by providing an implementation plan that:
 - a. Outlines major action items;
 - b. Provides the implementation timeframe;
 - c. Outlines the transition from existing travel vendors, if necessary;
 - d. Includes staff responsible for the implementation at each location;
 - e. Contingency plan during transition;
 - f. Provides agency process for creating traveler profiles;
 - g. Provides materials that could be given to SI staff to introduce your company.
2. Describe the actions that would be required of SI during the transition and implementation phases.
3. Please attach a sample implementation plan.

6 Account Management & Service

1. Based on our travel volume, explain how you would service our account. Kindly detail specifically the number of agents, experience level, management team, resources for agents, as well as roles and responsibilities.
2. Kindly provide us with the average number of years of experience among your agents and the current turnover rate among agents for the location that will be serving SI.
3. What type of ongoing training do you provide to your agents?
4. How will you ensure that your agents are well-versed in SI's travel policies, procedures, forms and travel trends?
5. How will your team identify SI policy exemptions?
6. How will you measure the quality of your onsite team's performance? Will SI be able to provide any input?
7. How frequently will SI receive reports on your performance (i.e. agent productivity, call return rates, customer challenges, etc.)?
8. Describe your proposed process of resolving customer service issues?
9. As a travel agency, describe if you are you able to provide any or **all** of the following services **internationally** (especially for countries in Africa and outside major capital cities):
 - airfare tickets,
 - hotel bookings,
 - visa facilitation,
 - car rental,

- car and driver service,
 - train tickets.
10. Does your agency support local/regional airline bookings? If yes, how?
 11. How does your agency compile and maintain profiles for SI travelers?
 12. Does your agency offer executive travel services?
 13. Do you offer any type of discount, loyalty, or rewards program to corporate clients?
 14. Can you offer a discount for early invoice payment?
 15. How will you inform SI of breaking industry news, security advisories, and market updates?
 16. What additional services and benefits is your agency able to provide? What are the costs associated with those benefits?

7 Agency Systems and Tools

1. SI's finance system runs on Deltek Costpoint (procurement and budgeting and planning systems will soon run on Deltek as well). Can you integrate your services with Costpoint for improved services?
2. SI works with International SOS for travel medical, healthcare, and security assistance. Describe your agency's capability and systems for interfacing with ISOS in terms of providing real time data on travelers' locations, flight updates, emergency warning assistance etc.
3. Describe your ability to manage unused ticket inventories for both traditional and online transactions.
4. How does your agency handle the issuance of paper tickets (when needed or requested)?
5. Please detail your distribution methodology for itineraries and confirmation numbers.
6. Describe your corporate hotel program, especially for countries in Africa, the Middle East, Eastern Europe, South Asia, Southeast Asia, and Central Asia.

8 Operational Configurations

1. What systems/procedures/tools are in place to streamline the telephone reservation process and reduce handling time?
2. During peak call times, how would your agency handle situations in which SI staff are unable to reach dedicated account agents?
3. How are your staff assigned? By account? By booking tool?
4. What is the average number of transactions processed per agent in the location that will serve SI?
5. What are the hours of operation for off-site agents, if applicable?

9 Cost Reduction Opportunities

1. Describe how your agency can deliver incremental savings beyond transaction fee savings.
2. Describe preferred vendor relations for airlines (including regional/local airlines in Africa, Asia, the Caucasus, Eastern Europe, South, South East, and Central Asia), car, and hotel agreements providing an overview of existing preferred vendor programs.
3. What cost savings opportunities can SI leverage from your agency contracts with travel vendors?
4. Do you provide any discount/loyalty/rewards programs to corporate clients?
5. Do you provide discount % points for early payment?
6. What tools or processes do you use to guarantee that the lowest compliant airfare is offered to travelers?
7. Describe your ability to provide special airline, car, and hotel services for travelers, including seat clearance in preferred seating areas, automated frequent flyer upgrade processing and upgrades on selected vendors.

10 Customer Satisfaction, Past Performance, and References

1. How do you measure customer satisfaction?
2. How often do you compile these metrics? Are they shared with your clients?
3. Offerors **must** provide three references, with contact information, which are similar in size, operations, and geographic presence to SI.

11 Billing

1. Does your agency offer a corporate card product?
2. Does your agency offer a central billing option? If so, describe your ability to reconcile centrally-billed charges.
3. Do you have the ability to bill separate projects within SI? If so, describe your ability to reconcile project-billed charges.
4. Please detail your distribution methodology for invoices.
5. Does your agency customize invoices to include budget coding? Do you have online access to invoicing?
6. Explain your process for voids, debit memos, and refunds. What is the turnaround time for each?
7. How and when do you notify your customers of the progress and ultimate resolution regarding the voids, debit memos, and refunds?
8. Provide a brief overview of your pricing philosophy and strategy.
9. How do you define transaction fee? Specifically address traditional versus online transactions.

12 Reporting

Describe the composition and format of any weekly or monthly reports you will provide to SI. What data will be included, such as number of travelers, safety alerts, financial data, and locations?

13 Additional documents to provide:

1. A copy of your Agency's latest annual report, if available;
2. Net income for the last three (3) years;
3. Copy of your standard Service Level Agreement (SLA) or standard terms and conditions.