



## **COVER PAGE**

Department of Administrative Services

The State of Oregon Acting by and through its Department of Administrative Services, Procurement Services, on behalf of the member states of the NASPO ValuePoint Cooperative Purchasing Program

## **TRAVEL MANAGEMENT SERVICE**

Request for Proposal (RFP)

**DASPS-2189-15**

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Closing Date: February 8, 2017

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## SECTION 1: GENERAL INFORMATION

### 1.1 INTRODUCTION

The State of Oregon, acting by and through the Department of Administrative Services, Procurement Services, (“DAS”), is conducting this permissive cooperative procurement on behalf of the member states of the NASPO ValuePoint Cooperative Purchasing Program (“NASPO ValuePoint”) and other Authorized Purchasers and is issuing this Request for Proposals (“RFP”) to establish a Master Agreement with a qualified vendor to provide travel management services, including but not limited to agent assisted services and, internet-based booking tool and fulfillment services.

Additional details on the Scope of the goods or services or both are included in the Scope of Work section.

DAS anticipates the award of one Master Agreement from this RFP. The initial term of the Master Agreement is anticipated to be 2 years with options to renew up to a maximum of 6 years.

### 1.2 SCHEDULE

The table below represents a tentative schedule of events. All times are listed in Pacific Time. All dates listed are subject to change. N/A denotes that event is not applicable to this RFP.

Event	Date	Time
Pre-Proposal Conference	January 5, 2017	10:00 AM
Questions / Requests for Clarification Due	January 12, 2017	10:00 AM
Answers / Clarification Issued (approx.)	Est. January 17, 2017	
RFP Protest Period Ends	January 20, 2017	10:00 AM
Closing (Proposals Due)	February 8, 2017	2:30 PM
Round 1 – Proposal Evaluation	Est. Week of February 21, 2017	
Round 1 – Notice of Competitive Range	Est. Week of March 15, 2017	
Round 2 – Presentations and Cost Methodology	Est. Week of March 27, 2017	
Round 2 – Notice of Competitive Range	Est. Week of April 10, 2017	
Round 3- Cost Evaluation	Est. Week of April 17, 2017	
Notice of Intent to Award (approx.)	May 1, 2017	
Award Protest Period Ends	7 calendar days after Notice of Intent to Award	

### 1.3 SINGLE POINT OF CONTACT (SPC)

The SPC for this RFP is identified on the Cover Page, along with the SPC's contact information. Proposer shall direct all communications related to any provision of the RFP, whether about the technical requirements of the RFP, contractual requirements, the RFP process, or any other provision only to the SPC.

## SECTION 2: AUTHORITY, OVERVIEW, AND SCOPE

### 2.1 AUTHORITY AND METHOD

DAS is issuing this RFP pursuant to its authority under ORS 279A.215 and OAR 125-246-0140, and OAR 125-246-0170(3)(I).

DAS is using the Competitive Sealed Proposals method, pursuant to ORS 279B.060 and OAR 125-247-0260. DAS may use a combination of the methods for Competitive Sealed Proposals, including optional procedures: a) Competitive Range; b) Discussions and Revised Proposals; c) Revised Rounds of Negotiations; d) Negotiations; e) Best and Final Offers; and f) Multistep Sealed Proposals.

### 2.2 DEFINITION OF TERMS

For the purposes of this RFP, capitalized words will refer to the following definitions. Capitalized terms not specifically defined in this document are defined in OAR 125-246-0110.

**“Authorized User Data”** means all data created by or in any way originating with Authorized User, and all data that is the output of computer processing of or other electronic manipulation of any data that was created by or in any way originated with Authorized User, whether such data or output is stored on Authorized User's hardware, Contractor's hardware or exists in any system owned, maintained or otherwise controlled by Authorized User or by Contractor.

**“Authorized User”** includes NASPO ValuePoint, employees of Participating Entities and Authorized Travelers.

**“Embedded Software”** means one or more software applications which permanently reside on a computing device.

**“GSA Per-Diem”** means the domestic GSA lodging per diem rate in effect at the location and on the date of the room occupancy as published on the Internet at [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem), as FTR Bulletins.

**“Intellectual Property”** means any and all patents, copyrights, service marks, trademarks, trade secrets, trade names, patentable inventions, or other similar proprietary rights, in tangible or intangible form, and all rights, title, and interest therein.

**“Lead State”** means the state conducting this cooperative procurement, evaluation, and award.

**“Master Agreement”** means the underlying agreement executed by and between the NASPO ValuePoint contract administrator, normally the Lead State, acting on behalf of NASPO ValuePoint, and the Contractor, as now or hereafter amended.

**“NASPO ValuePoint”** means the NASPO Cooperative Purchasing Organization LLC, doing business as NASPO ValuePoint (see section 2.3.1). NASPO ValuePoint is the entity managing the NASPO ValuePoint Cooperative Purchasing Program on behalf of the member states.

**“Participating Addendum”** means a bilateral agreement executed by the Contractor and a Participating Entity incorporating the Master Agreement and any other additional Participating Entity specific language or other requirements, e.g. ordering procedures specific to the Participating Entity, other terms and conditions.

**“Participating Entity”** means a state, city, county, district, other political subdivision of a State, and a nonprofit organization under the laws of some states, authorized by a state to enter into a Participating Addendum and who establishes a Contract under the Master Agreement for the issuance of certain Requests for Services and becomes financially committed to the purchase the Products or the Services. The conditions for participation are set forth in Attachment A, Exhibit D, section 5.

**“Product”** means any software (including embedded software), documentation, or deliverable supplied or created by Contractor pursuant to the Master Agreement.

**“Political Subdivision”** means a county, city, school district, law enforcement authority, special district, or any other kind of municipal, quasi-municipal, or public corporation organized pursuant to law.

**“Request for Services”** means any Authorized User initiated transaction(s), whether in person, in writing, by phone or other electronic means used by a Purchasing Entity to order the Products or Services.

**“State Chief Procurement Official”** means the primary individual designated and authorized by law or administrative rule to administer the authority of the state government for procurement of goods and services.

**“Services”** means the travel management services to be provided by Contractor pursuant to a Request for Services as described in Attachment A, Exhibit A.

**“Supporting Contract”** refers to other travel related contracts established by Oregon or any other Participating Entity that Contractor or other travel management services providers may need to use in order to provide the Services. These contracts will be the first option(s) offered to Authorized Users, including acceptance of required forms of payment per each contracts terms and conditions.

**“Traveler”** means the person authorized (for official business) to acquire Services under this Master Agreement.

**“User Information”** means all information directly or indirectly obtained from Travelers accessing the Services where such information is obtained by Contractor or by any of its employees, representatives, agents or any Third Parties having contractual privity with Contractor or who are under Contractor’s supervision or control.

## 2.3 OVERVIEW

### 2.3.1 NASPO ValuePoint Overview and Background

NASPO ValuePoint (formerly known as WSCA-NASPO) is a cooperative purchasing program of all 50 states, the District of Columbia and the territories of the United States. The Program is facilitated by the NASPO Cooperative Purchasing Organization LLC, a nonprofit subsidiary of the National Association of State Procurement Officials (NASPO), doing business as NASPO ValuePoint. NASPO is a non-profit association dedicated to strengthening the procurement community through education, research, and communication. It is made up of the directors of the central purchasing offices in each of the 50 states, the District of Columbia and the territories of the United States. NASPO ValuePoint facilitates administration of the cooperative group contracting consortium of state chief procurement officials for the benefit of state departments, institutions, agencies, and political subdivisions and other eligible entities (i.e. colleges, school districts, counties, cities, some nonprofit organizations, etc.) for all states, the District of Columbia, and territories of the United States. For more information about NASPO ValuePoint review the following websites [https://www.youtube.com/watch?v=8Vo\\_WX9q4F4](https://www.youtube.com/watch?v=8Vo_WX9q4F4), [www.naspovaluepoint.org](http://www.naspovaluepoint.org), and [www.naspo.org](http://www.naspo.org).

The NASPO ValuePoint travel sourcing team which consists of travel managers and procurement officials from six states, led by the State of Oregon, developed a nationwide lodging program in 2010 called WSCA Lodging. Subsequently, in 2012 the State of Oregon on behalf of the NASPO ValuePoint and other purchasing entities executed a travel management services master price agreement #2579 for a travel booking tool and fulfillment services to assist with managing travel bookings for lodging, rental car, and airline services. NASPO ValuePoint Lodging is a program consisting of approximately 10,000 individual hotels that honor at or below General Services Administration (GSA) Per-Diem rates for any State or political subdivision employee in the United States. NASPO ValuePoint has two competitive discount rental car master price agreements (#9949 and #9950), and 1 discount airline services master price agreement #2624. The current travel management services provider master agreement term expires on June 30, 2017.

### 2.3.2 Participating States

The State of Oregon is serving as the Lead State for this procurement and is conducting a permissive cooperative solicitation for the Participating States of NASPO ValuePoint and

other participants as defined in the Master Agreement attached hereto as Attachment A, and more specifically in the NASPO ValuePoint Terms and Conditions, attached hereto as Attachment A, Exhibit D.

Other entities may elect to participate in the Master Agreement resulting from this solicitation. Use of cooperative contracts by state agencies, political subdivisions and other entities (including cooperatives) authorized by Participating Entity's state statutes to use state contracts are subject to the approval of the respective State Chief Procurement Official. Issues of interpretation and eligibility for participation are solely within the authority of the State Chief Procurement Official. Other entities electing to enter into an agreement with Contractor for Travel Management Contractor Services may negotiate their own state specific terms and conditions through use of a Participating Addendum upon approval by the applicable State Procurement Official as set out in the NASPO ValuePoint Terms and Conditions as Attachment A, Exhibit D. A sample Participating Addendum is attached to this RFP as Attachment A, Exhibit B.

In addition to Oregon, the following Participating States have requested to be named in this RFP as potential users of the resulting Master Agreement: (Oregon, Hawaii, Montana, Virginia, Utah, and Maine). Other entities may become Participating Entities after award of the Master Agreement. NASPO ValuePoint and all other Participants do not guarantee to purchase any amount under the Master Service Price Agreement to be awarded. Estimated quantities, if any, are for informational purposes only and are not to be construed as a guarantee to purchase any amount. State-specific terms and conditions that will govern each state's Participating Addendum are included in Attachment H (State of Oregon); Attachments I, or may be incorporated into the Participating Addendum after award. The Lead State will not address questions or concerns or negotiate other States' terms and conditions. The Participating State shall negotiate these terms and conditions directly with the Contractor.

### 2.3.3 Project Overview and Purpose

DAS on behalf of the member states of NASPO ValuePoint program is looking for Proposers who offer travel management services, including but not limited to agent assisted services, internet-based booking tool and related fulfillment services. The Booking Tool will display NASPO ValuePoint hotel, vehicle rental, and air service agreements (Properties and Contractors) as preferred suppliers.

The purpose of the RFP is to solicit proposals from travel management services providers with the ability to provide domestic and international travel-related services (air, rail, car, hotel and other related travel management services) for public employees and other authorized users on official business within state departments, institutions, agencies, and political subdivisions and other eligible entities (i.e. colleges, school districts, counties, cities, some nonprofit organizations, etc.) for all states, the District of Columbia, and territories of the United States. Oregon is the Lead State for this RFP.

## 2.4 SCOPE OF WORK

**Travel Management Services:** Full reservation services for domestic and international travel including ticketing and fulfillment of travel reservations for all commercial modes of

travel, via an online booking tool and full service agent services, including but not limited to:

#### **2.4.1 Travel**

- Airfare reservations and booking
- Lodging Services

#### **2.4.2 Car rental reservations**

- Booking

#### **2.4.3 Other**

- Additional Travel Management Services
- Additional related travel services

## **SECTION 3: PROCUREMENT REQUIREMENTS AND EVALUATION**

### **3.1 MINIMUM REQUIREMENTS**

#### **3.1.1 Minimum Proposer Requirements**

- 3.1.1.1** Proposer shall provide evidence of accreditation and current certification from the Airlines Reporting Corporation (ARC) and the International Air Transportation Association (IATA) to represent, provide and sell these Services.
- 3.1.1.2** Proposer shall have 5 years' experience providing services comparable to those required under this Contract for large corporate or government clients with diverse geographic areas.
- 3.1.1.3** Each Proposer must provide three references. Instructions provided in section 3.4.5 of this RFP and attached hereto as Exhibit F.
- 3.1.1.4** Proposer must have been in the corporate travel management business for a minimum of five (5) years.
- 3.1.1.5** Proposer must have handled accounts with at least \$5,000,000 in annual corporate travel volume.

#### **3.1.2 Minimum Key Person Requirements**

Proposer must employ or contract key person(s) that have 5 years' experience within the last 7 years of the following:

- been in the corporate travel management business industry.
- handled accounts with at least \$5,000,000 in annual corporate travel volume.

### **3.2 MINIMUM SUBMISSION REQUIREMENTS**

### **3.2.1 Proposal Format and Quantity**

Proposal should follow the format and reference the sections listed in the Proposal Content Requirements section. Responses to each section and subsection should be labeled to indicate the item being addressed. Proposal must describe in detail how requirements of this RFP will be met and may provide additional related information.

Proposer shall submit its Proposal without extensive art work, unusual printing or other materials not essential to the utility and clarity of the Proposal. Proposer shall submit both a hard copy on white 8 ½" x 11" Recycled Paper and an electronic copy on electronic media such as thumb drive or CD.

Proposer shall submit an original, bearing the Proposer's authorized representative's Signature, and 2 copies of the un-redacted Proposal and 1 electronic un-redacted copy. In addition, if Proposer believes any of its Proposal is exempt from disclosure under Oregon Public Records Law (ORS 192.410 through 192.505), Proposer shall complete and submit the Affidavit of Trade Secret (Attachment B) and a fully redacted version of its Proposal, clearly identified as the redacted version.

Proposer shall submit its Proposal in a sealed package addressed to the SPC with the Proposer's name and the RFP number clearly visible on the outside of the package.

Proposer's electronic copy of the Proposal by USB drive, DVD, or CD must be formatted using Adobe Acrobat (pdf), Microsoft Word (docx), or Microsoft Excel (xlsx).

### **3.2.2 Proposal Layout**

Proposals must describe in detail how the requirements of this RFP will be met and may provide additional related information. Proposals should follow the format and reference the sections listed in the Proposal Content Requirements section. Responses to each section and subsection should be labeled to indicate the item being addressed. Cost information must remain separate, and be provided in the manner described below.

### **3.2.3 Proposal Page Limit**

Proposal is limited to 50 pages. Any pages exceeding this limit will not be provided to the evaluation committee or considered in the evaluation. Proposers are encouraged to address all needs or desirables identified in the Statement of Work and discouraged from including unnecessary marketing materials. The following items do not count toward the page limit:

- Sample Master Agreement (Attachment A)
- Trade Secret Affidavit (Attachment B)
- Proposal Certification Sheet (Attachment C)
- Proposer Information Sheet (Attachment D)
- Reference Check Forms ( Attachment F)
- COBID (Attachment G)
- Oregon PA (Attachment H)
- Hawaii PA (Attachment I)

### **3.2.4 Authorized Representative**

A representative authorized to bind the Proposer shall sign the Proposal. Failure of the authorized representative to sign the Proposal may subject the Proposal to rejection by Agency.

## **3.3 ROUND 1 PROCUREMENT PROCESS**

### **3.3.1 Public Notice**

The RFP, including all Addenda and attachments, is published in the Oregon Procurement Information Network (ORPIN) at <http://orpin.oregon.gov>. RFP documents will not be mailed to prospective Proposers.

DAS shall advertise all Addenda on ORPIN. Prospective Proposer is solely responsible for checking ORPIN to determine whether or not any Addenda have been issued. Addenda are incorporated into the RFP by this reference.

### **3.3.2 Questions / Requests for Clarification**

All inquiries, whether relating to the RFP process, administration, deadline or method of award, or to the intent or technical aspects of the RFP must:

- Be delivered to the SPC via email or hard copy
- Reference the RFP number
- Identify Proposer's name and contact information
- Be sent by an authorized representative
- Refer to the specific area of the RFP being questioned (i.e. page, section and paragraph number); and
- Be received by the due date and time for Questions/Requests for Clarification identified in the Schedule

### **3.3.3 Pre-Proposal Conference**

A pre-Proposal conference will be held at the date and time listed in the Schedule. Prospective Proposers' participation in this conference is highly encouraged but not mandatory.

The purpose of the pre-Proposal conference is to:

- Provide additional description of the project;
- Explain the RFP process; and
- Answer any questions Proposers may have related to the project or the process.

Statements made at the pre-Proposal conference are not binding upon DAS or any Participating State or Entity or Purchasing Entity. Proposers may be asked to submit questions in Writing. DAS will consider all comments, concerns, questions and protests. If, based upon the comments, questions, concerns or protests, DAS, in its sole discretion, believes it should make a change to the solicitation documents including the Sample

Master Agreement, DAS will post and addendum in ORPIN.

Attendance at the Pre-Proposal Conference is voluntary:

A pre-proposal conference will be held on date indicated in Section 1.2 of this RFP. Attendance at the conference is optional. Answers to questions asked during the pre-proposal conference will need to be submitted in writing after the Conference, answers will be provided via an addendum posted in <http://orpin.oregon.gov/open.dll/welcome>

This pre-Proposal will be held via webinar, contact the SPC to register no later than 1 day prior to the pre-Proposal. At that time, the SPC will email webinar instructions.

Audio dial in:

Phone:1-800-375-2612 Passcode: 201-008-8429#

### **3.3.4 Solicitation Protests**

#### **3.3.4.1 Protests to RFP**

Prospective Proposer may submit a Written protest of anything contained in this RFP, including but not limited to, the RFP process, Specifications, Scope of Work, and the terms and conditions of the proposed Master Agreement. This is prospective Proposer's only opportunity to protest the provisions of the RFP, except for protests of Addenda, as provided below.

#### **3.3.4.2 Protests to Addenda**

Prospective Proposer may submit a Written protest of anything contained in the respective Addendum. Protests to Addenda, if issued, must be submitted by the date/time specified in the respective Addendum, or they will not be considered. Protests of matters not added or modified by the respective Addendum will not be considered.

#### **3.3.4.3 Protests must:**

- Be delivered to the SPC via email or hard copy
- Reference the RFP number
- Identify prospective Proposer's name and contact information
- Be sent by an authorized representative
- State the reason for the protest, including:
  - the grounds that demonstrate how the Procurement Process is contrary to law, Unnecessarily Restrictive, legally flawed, or improperly specifies a brand name; and
  - evidence or documentation that supports the grounds on which the protest is based
- State the proposed changes to the RFP provisions or other relief sought
- Protests to the RFP must be received by the due date and time identified in the Schedule

- Protests to Addenda must be received by the due date identified in the respective Addendum

#### **3.3.4.4 Protest Response**

DAS will respond timely to all protests submitted by the due date and time listed in the Schedule. Protests that are not received timely or do not include the required information may not be considered.

#### **3.3.5 Proposal Submission Options**

Proposer is solely responsible for ensuring its Proposal is received by the SPC in accordance with the RFP requirements before Closing. DAS is not responsible for any delays in mail or by common carriers or by transmission errors or delays or mistaken delivery. Proposal submitted by any means not authorized will be rejected.

##### **3.3.5.1 Submission through ORPIN**

Submission through ORPIN is not allowed for this RFP.

##### **3.3.5.2 Submission through Mail or Parcel Carrier**

Proposal may be submitted through the mail or via parcel carrier, and must be clearly labeled and submitted in a sealed envelope, package or box. The outside of the sealed submission must clearly identify the Proposer's name and the RFP number. It must be sent to the attention of the SPC at the address listed on the Cover Page.

##### **3.3.5.3 Submission in Person**

Proposal may be hand delivered, and must be clearly labeled and submitted in a sealed envelope, package or box. Proposal will be accepted, prior to Closing, during DAS' normal business hours of Monday –Friday, 8:00 am to 5:00 pm Pacific Time, except during State of Oregon holidays and other times when DAS is closed. The outside of the sealed submission must clearly identify the Proposer's name and the RFP number. It must be delivered to the attention of the SPC at the address listed on the Cover Page.

#### **3.3.6 Proposal Modification or Withdrawal**

Any Proposer who wishes to make modifications to a Proposal already received by DAS shall submit its modification in one of the manners listed in the Proposal Submission Options section and must denote the specific change(s) to the Proposal submission.

If a Proposer wishes to withdraw a submitted Proposal, it shall do so prior to Closing. Proposer shall submit a Written notice Signed by an authorized representative of its intent to withdraw its Proposal in accordance with OAR 125-247-0440. The notice must include the RFP number and be submitted to the SPC.

#### **3.3.7 Proposal Due**

Proposal and all required submittal items must be received by the SPC on or before Closing. Proposal received after the Closing will not be accepted. All Proposal modifications or withdrawals must be completed prior to Closing.

Proposals received after Closing are considered LATE and will NOT be accepted for evaluation. Late Proposals will be returned to the respective Proposer or destroyed.

### **3.3.8 Proposal Rejection**

DAS may reject a Proposal for any of the following reasons:

- Proposer fails to substantially comply with all prescribed RFP procedures and requirements, including but not limited to the requirement that Proposer's authorized representative sign the Proposal in ink.
- Proposer fails to meet the responsibility requirements of ORS 279B.110.
- Proposer makes any contact regarding this RFP with State representatives such as State employees or officials other than the SPC or those the SPC authorizes, or inappropriate contact with the SPC.
- Proposer attempts to inappropriately influence a member of the Evaluation Committee.
- Proposal is conditioned on DAS' acceptance of any other terms and conditions or rights to negotiate any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation in the RFP or Addenda.

### **3.3.9 Opening of Proposal**

There will be no public Opening of Proposals. Proposals received will not be available for inspection until after the evaluation process has been completed and the Notice of Intent to Award is issued pursuant to OAR 125-247-0630. However, DAS will record and make available the identity of all Proposers after Opening.

## **3.4 ROUND 1 PROPOSAL CONTENT REQUIREMENTS**

Proposal must address each of the items listed in this section and all other requirements set forth in this RFP. Proposer shall describe the Goods to be provided or the Services to be performed or both. A Proposal that merely offers to provide the goods or services as stated in this RFP will be considered non-Responsive to this RFP and will not be considered further.

This RFP is designed to provide interested Proposers with sufficient information to submit Proposals meeting minimum requirements, but is not intended to limit a Proposal's content or exclude any relevant or essential data. Proposers are encouraged to expand upon the specifications to add service and value consistent with state requirements. However, please do not include marketing or advertising material in the Proposal. Proposals should be straightforward and address the requests of the RFP. Proposals containing excess marketing or advertising material may receive a lower evaluation score if specific information is difficult to locate.

### **3.4.1 Proposal Certification Sheet**

Proposer shall complete and submit the Proposal Certification Sheet (Attachment C).

### **3.4.2 Proposer Information Sheet**

Proposer shall complete and submit the Proposer Information Sheet (Attachment D).

### **3.4.3 Company History / Experience**

Describe Proposer's experience in the corporate travel management business industry. Including at a minimum:

#### **3.4.3.1 Key Person(s)**

A resume for each proposed Key Person showing 5 years of experience in the last 7 years, corporate travel management business industry and the handling of accounts at least \$5,000,000 in annual corporate volume.

#### **3.4.3.2 History**

A brief company history, not to exceed 3 pages, that includes locations, number of employees, gross sales, and number of corporate/government accounts.

#### **3.4.3.3 Account Size**

A description of Proposers handling of accounts with at least \$5,000,000 in annual corporate travel volume.

#### **3.4.3.4 Staffing**

A description of a continuing education plan for staff, how they keep up to date with travel industry changes, trends, and an organizational chart indicating proposed staffing configuration. Include including number of travel agents based on estimated volume of travel with a description of configuring service for Participating Entities and Authorized User Accounts.

### **3.4.4 Services Provided**

Describe Proposer's process for providing the following services:

#### **3.4.4.1 Travel Management**

The process for ensuring that only Authorized Users are given access to the Supporting Contracts, including the process for new entities to set up an account for services.

#### **3.4.4.2 Online Booking Tool and Reservation Process**

Description and ability to provide multiple options of industry wide recognized online booking tools, allowing Participating Entities to choose the booking tool which provides the best value to them.

##### **3.4.4.2.1 Booking**

The booking tool, including at a minimum:

- Real time search and booking capabilities, made available 24 hours a day, 7 days a week, with no additional charge and average downtime;
- Maintains Traveler profiles, with the capability of adding, maintaining user log in, changing or deleting profiles by users;
- Accessible on a smartphone or tablet
- On-line user support i.e. chat support etc.
- A secure website; password protected and contains a ticket and payment authorization system;
- Reservation confirmation screens;
- Permit the use of online changes to be made by the traveler (primary method) and the GDS (secondary method);
- Capability of saving trips or cloning trip;
- List contracted lodging, air, car rental, and rail suppliers;
- Identifying all state-contracted airfares and preferred travel vendors with an icon; Permit the use of the major Airlines Reporting Corporation (ARC) (Legacy Carriers) and non-ARC (Southwest and other Low Cost Carriers [LCC]) participating carriers. Permit the use of online changes and exchanges (change-modify functionality) for non-ARC participating carriers;
- Include a payment authorization system that allows for multiple billing/payment options for the Participating Entity to have available for the Authorized Users to select from which include payment by personal credit card and/or the Business Travel Account (BTA);
- Pre-trip approval process to obtain multiple levels of approval via an automated process. Capture information about the travel arrangements at the time of booking, i.e. travel itinerary details and trip approvals;
- Track and display onscreen to the Participating Entity unused tickets for all airlines by traveler name and provide residual value to the user as part of the booking process;
- Support specific Participating Entity policies identifying acceptable and non-acceptable travel rules;
- Identify and display state certified green hotels with customized icons and sort by priority within the lowest rate available. Ability to direct bookings to embedded or accommodated travel management services;
- Provide full content and full functionality with non-ARC participating carriers.
- Provide the capability to input and transmit a frequent flyer rewards program number at the time of reservation.

#### 3.4.4.2.2 Agent Services

A description of the process for providing professional travel agent and related

services to assist the Participating Entity in meeting its travel needs for various types of domestic and international business travel. Provide the Participating Entity with a dedicated ARC number, International Air Transport Association (IATA) number, and pseudo city code. Proposer is responsible for all associated fees and must maintain them at no cost to the Participating Entity for the entire term of the Master Agreement. Include at a minimum:

- Issue a credit on downgraded exchanged tickets to the Participating Entity originally billed for the ticket. When a department/agency applies for a credit, the Proposer will promptly process the necessary paperwork and the credit should be applied to the Business Travel Account (BTA).
- Ability to access the state-contracted, discounted airfares and city pairs.
- Ability to book and integrate non-GDS/non-ARC carriers and the data within the booking process.
- Secure reservations via a GDS and provide automation to monitor fares on a scheduled basis for the reissuing of tickets when the fare has decreased.
- Offer the lowest available rates and fares for all travel reservations.
- Verify rates and fares for all tickets issued. In the event fares are reduced, the Proposer shall search out affected tickets and shall reissue them at lower rates.
- Assist , reconcile and resolve any problems associated with reservations and tickets (includes air, rail, lodging and car rentals).

#### 3.4.4.2.3 **Scheduling and Booking:**

The process for scheduling, booking and ticketing air transportation, rail, rental car, and hotel reservations, and other travel requirements as necessary, for individual and group travelers traveling on behalf of the Participating Entity. Including the ability to access the state-contracted, discounted airfares and city pairs.

- Issue a credit on downgraded exchanged tickets to the Participating Entity originally billed for the ticket. When a department/agency applies for a credit, the Proposer will promptly process the necessary paperwork and the credit should be applied to the Business Travel Account (BTA).
- Ability to access the state-contracted, discounted airfares and city pairs.
- Ability to book and integrate non-GDS/non-ARC carriers and the data within the booking process.
- Secure reservations via a GDS and provide automation to monitor fares on a scheduled basis for the reissuing of tickets when the fare has decreased.
- Offer the lowest available rates and fares for all travel reservations.
- Verify rates and fares for all tickets issued. In the event fares are reduced, the Proposer shall search out affected tickets and shall reissue them at lower rates.

- Assist and reconcile and resolve any problems associated with reservations and tickets (includes air, rail, lodging and car rentals).

#### 3.4.4.2.4 **Ticket Distribution**

The process to accurately distribute customized e-ticket itineraries and receipts at time of ticketing or booking and process paper documents when electronic tickets are not available. At a minimum include:

- A Quality Control Program to ensure reservations are correctly booked and documented; including but not limited to: all necessary changes or adjustments in travel documents that may be required due to rescheduling on the part of the Participating Entity or on part of the traveler prior to the trip or during the trip.
- Automated capability to complete pre-trip audits to ensure that the bookings/fares are adjusted to the lowest fare that meets the traveler need.
- Provide each traveler and agency/department with a complete electronic trip itinerary.
- Comply with each specific Participating Entity travel policy and trip approval requirements as specified by the Participating Entity or Authorized User. Proposer shall document Passenger Name Record (PNR) with exception documentation, reason codes and low fare comparison.

#### 3.4.4.2.5 **Reservation(s) Process**

The process for availability of all reservation processes through the Global Distribution System (GDS) and the online booking tool, including the ability to hold reservations according to the supplier procedure.

### 3.4.4.3 **Lodging**

The process used to recruit and onboard lodging providers must ensure compliance of the Lodging and Services Qualifications Requirements outlined.

#### 3.4.4.3.1 **Annual Lodging Refresh**

The Proposer's solicitation process for recruiting and onboard of lodging providers and management of the hotel directory. The solicitation process will integrate with the On-line Booking Tool and fulfillment services. This process includes using a system to send out room rate agreements and a central communication push to notify hotels of the opportunity. The Proposer is responsible for:

- Sending out instructions and assist hotels with loading their information into the booking tool.
- Sending out communications, via the booking tool, to properties and maintain property directory that can be supplied to participants.
- Negotiating rate(s) lower than the government rate or the government rate

is always available. Where the Participating Entity has agreements with hotels/motels for discounted government rates, or is able to obtain lower rates than offered by the Proposer, the Proposer shall obtain such rates or lower rates.

- Continuing to pursue hotel price agreements to negotiate state government rates.
- Offering hotel properties certified in green lodging. These hotels at the per diem rate in the traveler's preferred location, as the first option to be offered to the Traveler.
- Make available to the Participating Entity and Authorized Users any guaranteed corporate or other discount rates it has negotiated with hotels/motels that are at per diem or less rates. Participating Entity government travelers utilize the current lodging per diem. For current lodging per diem rates, refer to <http://www.gsa.gov/portal/content/104877>.

#### **3.4.4.4 Ongoing Lodging Services**

The ongoing services Proposer would provide to Participating Entities. Including at a minimum:

- Process for sending out communications, via the booking tool, to properties and maintain property directory that can be supplied to participants.
- Lodging reservations which includes initiating and confirming reservations and confirming the rate at which the reservation is made. When a reservation is completely canceled, Proposer is responsible for canceling the accompanying lodging reservations unless requested not to do so.
- Maintaining the participant list provided by Lead State that participate in the program.
- Include a plan to mitigate lodging provider's unique payment needs, if the room is pre-paid by someone other than the traveler. For instance, the need for a third party credit card authorization form or direct bill account.
- Ensuring all PNR are evaluated for accuracy and completeness. Communicating all travel industry issues to the Participating Entity, Lead State, and optional user Travel Coordinators, and Travelers.

#### **3.4.4.5 Additional Services Description of additional assurances.**

At a minimum include:

- Process for notifying travelers of airport closings, flight status changes, weather delays, or any other travel related delays while the Traveler is in travel status, in a timely manner.
- Description of duty of care and travel risk services, provided and the process for using them if needed.

- Process for providing credits or refunds for travel services not utilized within seven (7) days of the cancellation or change.
- Process for issuing a credit to the Business Travel Account (BTA) on downgraded exchanged tickets to the Participating Entity originally billed for the ticket.
- Process for documenting Passenger Name Record (PNR) with exception documentation, reason codes and low fare comparison.

#### **3.4.4.6 Website**

A description of the process for developing and maintaining a user-friendly website where Authorized Users log in for government travel. The website will direct users to the appropriate travel sites (i.e. online booking tool, reporting tool), provide training, forms, FAQ's, travel news, updates and other helpful travel information. At minimum the plan must include customized subsites for the following entities at no additional charge:

- NASPO ValuePoint sub site;
- Entity and State Specific sub sites;
- Access the NASPO ValuePoint discounted travel agreements (air, rental car, lodging, etc.).
- These sub-sites must be configurable to meet the participating entity's Authorized User profiles.
- List NASPO ValuePoint Lodging Program properties and hotels first preference, and then the state's contracted hotels.

#### **3.4.4.7 Customer Service**

A description of the procedures and processes with the availability, speed of calls answered, hold time, and adequate staffing. Including at a minimum, Proposer's Service hours in the Participating Entity's local time zone during the hours of 8:00 AM to 5:00 PM with the ability to make routine travel reservations and online support during normal business hours; excluding weekends and State observed holidays, and Live agent service outside of normal business hours.

Describe the ability of the reporting system to produce all requested reports; including at a minimum:

##### **3.4.4.7.1 Standard Reports**

The process to provide and maintain at a minimum the following report types:

- Pre and post trip reporting;
- Fare savings/lost savings;
- Fraud alerts;
- Policy compliance reporting including exceptions reporting;

- Top travel/markets/vendors,
- Travel booking analysis including online vs. offline transactions,
- Crisis management reporting, and
- Class of service required by travel policies and regulations.

#### 3.4.4.7.2 **Accounting**

Description of report(s) showing expense tracking, billing codes, vendor, volume and traveler. Annually or when requested by the Participating Entity, reports include:

- Billing summary broken down by month including credits and commissions
- Credit card reconciliation including transaction detail
- Summary and over view of account
- Due dates and administrative fee payments and usage reports will be completed.

#### 3.4.4.7.3 **Customized**

The ability to customize reports at the request of the Participating Entity.

#### 3.4.4.7.4 **Unused Tickets**

The process for an automated process to identify, track and recover value from unused tickets. Including communication to the Participating Entity.

#### 3.4.4.7.5 **Ad Hoc Reports**

The ability for Ad Hoc reporting to be run by a Participating Entity.

### 3.4.5 **Additional Travel Related Services Available**

#### 3.4.5.1.1 **Tools Provided**

A description of additional tools related to travel management services and technologies that Participating Entities may be interested in learning more about. These services should add value to and enhance the authorized users travel management experience. Some of the optional travel service level features identified at a minimum are:

- Ability to update the booking tool with properties not included in the Global Distribution Services (GDS)
- Statewide and nationwide travel agreements consulting
- Duty of care, risk management, and corporate liability planning
- Meeting and conference planning
- Automated user profile synch technology
- Automated travel planning and approval

- Automated airfare and hotel price tracking
- Automated invoice management
- Automated expense reporting
- Automated reimbursements
- Mobile technology

### **3.4.6 Implementation /Onboarding**

#### **3.4.6.1.1 Transition**

A description of the process for coordination in regards to transitioning from the current Contractor to any successor to ensure minimum disruption to Authorized Users and avoid decline in service.

#### **3.4.6.1.2 Implementation**

A description of the process for Proposer to carry out the major activities of this project in context with the Scope of Work and implementation of services for each participating entity including that the Proposer intends to follow, including timelines, key milestones, transition and set up process for existing traveler profiles.

#### **3.4.6.1.3 Disengagement**

A description of the process and tools the Proposer currently has to assist the Participating Entity in to transition from Proposer’s solution to a subsequent solution.

### **3.4.7 Program Management**

A description of the Proposer’s profile management process. The process must include at a minimum:

#### **3.4.7.1 Data Feed**

Data feed capabilities within the online booking tool for loading and creating multiple new users at one time.

#### **3.4.7.2 Profile Management**

Process including the ability for Authorized Users to update profile information including preferences.

#### **3.4.7.3 Data Management and Security**

A description of the Proposer’s process to create, publish, maintain and deploy a profile data security plan. The plan must include at a minimum:

##### **3.4.7.3.1 Profile Data**

The process hierarchy processes and how it works in regard to profile data is accessed and only by those Proposers' personnel who require access to perform such activities.

#### **3.4.7.4 Incident Reporting**

The process if the need arises to investigate any incident and provide notice to the Lead State, the individuals who data was involved, and to others as required by law or deemed appropriate by the Participating Entity.

#### **3.4.7.5 System Management**

How the Proposers identify's and repairs any security gaps that may expose Participating Entity data to risk of unauthorized access or use.

#### **3.4.7.6 Data Confidentiality**

A description of security policies in place that include Confidentiality of data including personal information

#### **3.4.7.7 Training**

A description of training that is available to Participating Entities, the Lead State and NASPO ValuePoint. Training must be at no additional charge to the Participating Entities or NASPO Valuepoint. Including at a minimum:

- Online booking tool sessions;
- Webinars;
- Reporting;
- Online user support;
- Printable user guides/tutorials for travel administrators, travel coordinators, and Authorized Users;
- Presentations including preparation and planning.

#### **3.4.7.8 Disaster Recovery**

A description of the Proposer's disaster recovery and business continuity plans. This should include timelines and ability to continue services required in the Scope of Work. The plan must at a minimum address:

##### **3.4.7.8.1 Server/Power Failure**

Identify processes and approaches used to ensure business continuity in the event of a power failure and / or server failure affecting Proposers operations. Include the expected down-time until the backup goes in to affect.

##### **3.4.7.8.2 Communication**

Proposer's method for notifying Participating Entities of a disaster or other service disruption. Include method for providing status updates.

### **3.4.7.9 Subcontracting**

A description of all services the Proposer intends to sub-contract. Including at a minimum:

- Description of how implementation of services will work including the sub-contractor and how they are managed.
- Description and process of proposed technical solutions from sub-contractors who would be providing Services requested in the Scope of Work.

### **3.4.8 Program Outreach**

A description of how Proposer intends to promote the use of the Master Agreement. Including what opportunities and/or challenges does the Proposer see in working with NASPO ValuePoint

### **3.4.9 References**

Provide at least 3 references from current or former client firms for similar projects performed for any clients within the last 3 years. References must verify the quality of previous, related Work.

DAS may check to determine if references provided support Proposer's ability to comply with the requirements of this RFP. DAS may use references to obtain additional information, break tie scores, or verify any information needed. DAS may contact any reference (submitted or not) to verify Proposer's qualifications.

Proposer shall send the Reference Check Form (Attachment F) to its references. Reference forms must be completed by the reference, returned to the Proposer and submitted with the Proposal.

### **3.4.10 Public Record/Confidential or Proprietary Information**

All Proposals are public record and are subject to public inspection after DAS issues the Notice of the Intent to Award. If a Proposer believes that any portion of its Proposal contains any information that is a trade secret under ORS Chapter 192.501(2) or otherwise is exempt from disclosure under the Oregon Public Records Law (ORS 192.410 through 192.505), Proposer shall complete and submit the Affidavit of Trade Secret (Attachment B) and a fully redacted version of its Proposal.

Proposer is cautioned that cost information generally is not considered a trade secret under Oregon Public Records Law (ORS 192.410 through 192.505) and identifying the Proposal, in whole, as exempt from disclosure is not acceptable. DAS advises each Proposer to consult with its own legal counsel regarding disclosure issues.

If Proposer fails to identify the portions of the Proposal that Proposer claims are exempt from disclosure, Proposer has waived any future claim of non-disclosure of that information.

## **3.5 ROUND 1 EVALUATION PROCESS**

### 3.5.1 Responsiveness and Responsibility Determination

Proposals received prior to Closing will be reviewed for Responsiveness to all RFP requirements including compliance with Minimum Requirements section and Proposal Content Requirements section. If the Proposal is unclear, the SPC may request clarification from Proposer. However, clarifications may not be used to rehabilitate a non-Responsive Proposal. If the SPC finds the Proposal non-Responsive, the Proposal may be rejected, however, DAS may waive mistakes in accordance with OAR 125-247-0470.

In accordance with OAR 137-047-0261(6)(a)(A), DAS may establish a Competitive Range of all Proposers who have made a good faith effort in submitting a Proposal in response to this RFP for the purpose of correcting deficiencies in Proposals for determining responsiveness during Round 1.

At any time prior to award, DAS may reject a Proposer found to be not Responsible.

### 3.5.2 Evaluation Criteria

Proposals meeting the requirements outlined in the Proposal Content Requirements section will be evaluated by an Evaluation Committee. Evaluators will assign a score of 0 to 5 for each evaluation criterion listed below in this section.

SPC may request further clarification to assist the Evaluation Committee in gaining additional understanding of Proposals. A response to a clarification request must be to clarify or explain portions of the already submitted Proposal and may not contain new information not included in the original Proposal.

SCORE	EXPLANATION
5	Outstanding - Response exceeds all of the elements of the criterion and has demonstrated in a clear and concise manner a thorough knowledge and understanding of the subject matter and project. The Proposer provides superior insight into its expertise, knowledge, and understanding of the subject matter.
4	Good – Response meets all of the elements of the criterion and Response provides useful information, while showing experience and knowledge within the category. Response demonstrates above average knowledge and ability with no apparent deficiencies noted.
3	Adequate – Response meets minimum elements of the criterion in an adequate manner. Response demonstrates an ability to comply with guidelines, parameters, and requirements with no additional information put forth by the Proposer.
2	Fair – Response meets most but not all requirements in an adequate manner. Response did not demonstrate the ability to comply with all of the guidelines, parameters, and requirements.

1	Poor – Response does not meet most of the minimum requirements and does not demonstrate the expertise, knowledge, and understanding of the subject matter.
0	RESPONSE OF NO VALUE – An unacceptable response that does not meet any of the requirements set forth in the RFP. Proposer has not demonstrated knowledge of the subject matter.

### 3.5.2.1 Company History / Experience

#### 3.5.2.1.1 Key Person(s):

- How well does the Proposer describe all relevant information regarding the number, qualifications and experience of Key Persons(s) to be specifically assigned to this engagement?
- How do the Proposed Key Person’s describe the Proposer’s understanding of the needs of the participating entities
- How do the Proposed Key Person’s demonstrate Proposer’s commitment to the success of this program?

#### 3.5.2.1.2 History:

- How well does the description of the company history and experience meet the needs of the Participating States?
- How well does the Proposer’s history indicate its ability to successfully manage a travel program for many states?

#### 3.5.2.1.3 Account Size:

How well does the Proposer outline its company’s infrastructure including role descriptions, account size, and organizational charts for the proposed service and staff configuration?

#### 3.5.2.1.4 Staffing:

How well does the Proposer describe its staffing plan (including the number of travel agents) based on estimated volume of travel, describe how you would configure and service Participating Entity and Authorized User accounts?

### 3.5.2.2 Services Provided

Does the Proposer lay out a clear understanding of the scope of work, and plan to provide the minimum services outlined in this RFP?

#### 3.5.2.2.1 Travel Management:

How well did the Proposer describe the Authorized User access to preferred and discounted Supporting Contracts?

### 3.5.2.2.2 Online Booking Tool and Reservation Process

How well does the Proposer description of the features and enhancements, fit the needs of the Participating Entities?

#### 3.5.2.2.2.1 Booking:

- How well does the Proposer describe in detail its online booking tool options being offered, including direct-connect features and benefits with non-ARC participating carriers (including Southwest), any enhancements and authorizations, and security features?
- How well does the Proposer describe (using statistics) how reliable the booking tool is and provide an explanation of down time experienced in the last year?
- How well does the Proposer describe the system’s capabilities to display the state’s contracted airline “city-pair” and point of sale discount fares?
- How well does the Proposer explain the booking tool’s ability to make changes on a pre and post ticketing basis, the various approval processes available and how unused tickets are tracked for all airlines?
- How well does the Proposer describe how the fulfillment is completed for on-line bookings (i.e., third party, agency)?

#### 3.5.2.2.2.2 Agent Services

How well does the Proposer describe its experience in booking various types of travel?

#### 3.5.2.2.2.3 Scheduling and Booking

- How well does the Proposer describe how it will ensure, for traditional telephone bookings, that the same airline inventory is available as the on-line travel reservation system?
- How well does the Proposer describe how it plans to provide the lowest rates to Authorized Users?
- How well does the Proposer describe its ability to handle high volume peak periods, and what types of metrics are used to ensure quality standards of performance are consistently provided?
- How well does the Proposer describe its service offerings for all travel arrangements both domestic and international for State travelers, including air, lodging, rail reservations, ground transportation, rental car reservations and payment services?
- How well does the Proposer describe available resources, expertise, and experience to assure the services are delivered timely, accurately and successfully?
- How well did the Proposer describe its advice and applications

provided to Authorized Users for passports, payment, tourist cards and other documents necessary for foreign travel?

**3.5.2.2.2.4 Ticket Distribution**

- How well does the Proposer’s quality control Program meet the needs of the Participating Entity?
- How well does the Proposer’s method for delivering electronic trip itinerary meet the needs of the Participating Entity?
- How well does the Proposer describe how it will encourage compliance with the end users respective travel policies?

**3.5.2.2.2.5 Additional Services**

- How well does the Proposers explanation of communications offered to advise travelers of last minute changes, delays, ticket changes, airport changes, and cancellations, etc. to their trip, fit the needs of Participating Entities? This includes, communications for trips booked via online and agent assisted.
- How well does the Proposer describe duty of care and risk management services provided to each Participating Entity?
- How well does the Proposer’s process for issuing credits meet the Participating Entries needs?
- How well does the Proposer describe how commissions and incentives earned are tracked and reconciled, including air, rail, hotel, car rental, and GDS

**3.5.2.2.2.6 Reservation(s):**

How well did the Proposer describe the Global Distribution System (GDS) including the engine being used to search for web fares, and how bookings are made with Airline carriers that have limited availability in the GDS?

**3.5.2.2.3 Lodging:**

How well did the Proposer describe its process to recruit and onboard lodging Providers?

**3.5.2.2.3.1 Annual Lodging Refresh:**

- How well did the Proposer describe its past experiences negotiating discounts with travel providers and how those experiences can be leveraged and applied to this contract?
- How well did the Proposer describe its plan to administer the recruiting and onboard of lodging providers and management of the hotel directory?

**3.5.2.2.4 Ongoing lodging Services:**

- How well did the Proposer meet the needs of the Participating Entity?
- How well did the Proposer’s plan for unique payment issues meet the need of the Participating Entity?

#### 3.5.2.2.5 Website

- How well does the Proposer meet the needs of the Participating State in the average speed of answer and hold time?
- How well does the Proposer describe its process for responding to afterhours travel requests in a timely manner?

#### 3.5.2.2.6 Customer Service

- How well does the Proposer meet the needs of the Participating State in the average speed of answer and hold time?
- How well does the Proposer describe its process for responding to afterhours travel requests in a timely manner?

#### 3.5.2.2.7 Reporting

##### 3.5.2.2.7.1 Standard Reports:

How well does the Proposer describe its reporting capabilities in detail, and provide examples of detailed standard management reports?

##### 3.5.2.2.7.2 Accounting:

How well does the Proposer describe its reporting capabilities in detail and provide examples of detailed accounting reports?

##### 3.5.2.2.7.3 Customized:

How well does the Proposer describe and demonstrate the ability to customize reports as requested and the timeline to deliver the report?

##### 3.5.2.2.7.4 Unused Ticket

- How well does the Proposer explain its utilization of the unused ticket process and describe the methods/processes that will be used to ensure unused tickets are refunded and/or credited as required?
- How well does the Proposer describe the tracking of unused electronic/and or paper airline tickets and coupons?

##### 3.5.2.2.7.5 Ad Hoc Reports:

How well does the Proposer’s Ad Hoc Reports meet the needs of the Participating Entity?

#### 3.5.2.3 Additional Travel Related Services Available:

- How well did the Proposer describe other added value solutions and their ability to provide desirable service level features?
- How well does the Proposer appear to be able to stay comprised of and offer value added services and enhancements in house and to its customers?
- How well does the Proposer adequately demonstrate its ability to provide consultative services and did it outline the types and level of consultation offered?
- Did the Proposer suggest and offer other value added services? How would those meet the needs of the Participating Entity?

### **3.5.2.4 Implementation / Onboarding**

#### **3.5.2.4.1 Transition**

- How well did the Proposer describe its transition and training process that will be used to ensure a smooth implementation? Did Proposer specify all training to be provided including training for travel agency staff, Statewide Travel Program Staff, travelers?
- How well does the Proposer provide evidence of its ability to successfully transition?
- Does the Proposer provide evidence of clear, timely and complete communication, in writing and verbally?
- How well does the Proposer describe the transition and/or set up process for existing traveler profiles?

#### **3.5.2.4.2 Implementation**

- How well did the Proposer provide a draft implementation plan that includes timelines for implementation, key milestone dates, deliverables, and an organizational chart defining agency's responsibilities?
- How well did the Proposer identify key individuals who will be responsible for implementation, their roles and responsibilities?
- How well does the Proposer describe any potential issues, problems or shortcomings that may be encountered supporting the Participating Entity?

#### **3.5.2.4.3 Disengagement**

How well does the Proposers describe the process and tools to assist the Participating Entity in transition to a subsequent solution?

### **3.5.2.5 Program management**

#### **3.5.2.5.1 Profile Management**

##### **3.5.2.5.1.1 Data Feed:**

How well does the Proposer meet the needs of the Participating Entity?

#### **3.5.2.5.1.2 Profile Management**

How well does the Proposer describe the management of Authorized User's and Participating Entity's profiles?

#### **3.5.2.5.2 Data Management and Security**

How well does the Proposer's plan meet the needs of the Participating Entity?

#### **3.5.2.5.3 Profile Data**

- How well does Proposer's plan to manage and secure Authorized User's data describe Proposer's understanding the needs of the Authorized Users.?
- How well does Proposer's plan ensure the proper level of security?

#### **3.5.2.5.3.1 Incident Response**

How well does Proposer's plan satisfy the needs of Authorized User in the event of a security issue?

#### **3.5.2.5.3.2 System Management**

How well does the Proposer's description of how security gaps are repaired meet the needs of the Participating Entity?

#### **3.5.2.5.3.3 Data Confidentiality**

How well does the Proposer describe its security policies and procedures for confidential information?

#### **3.5.2.5.4 Training**

How well does the description of training available meet the needs of the Participating Entity?

- How well did the Proposer identify the types of training documentation that will be provided (i.e. user manuals, guides, etc.)?
- How does the Proposer's plan meet the needs of the Participating Entity and Lead State?
- How well does the Proposer describe the training process for the reporting function of the Online Booking Tool?
- How does the Proposer's plan meet the needs of the Participating Entity and Lead State?

#### **3.5.2.5.5 Disaster Recovery**

How well did the Proposer describe its Disaster Recovery Plan?

#### **3.5.2.5.5.1 Server Failure**

- How well does the Proposer describe server failure procedures in case

of a disaster?

- How well did the Proposer describe how the Participating Entity data will only be accessed and used for the purpose of performing the activities that are the subject of this RFP, and only by those personnel within your organization who require access to perform such activities?

#### **3.5.2.5.5.2 Communication**

How well does the Proposer’s communication plan meet the needs of the Participating Entity?

#### **3.5.2.5.6 Subcontracting**

- How well does the Proposer’s response describe which services will be sub-contracted and how possible issues are managed?
- How well does the Proposer’s response describe which services will be sub-contracted and how possible issues are managed?

#### **3.5.2.6 Program Outreach**

- How well does the plan meet the communication needs of the Participating Entries?
- A description of the expected results at the end of the first year and subsequent years of the contract?
- How well does the plan outline working with NASPO Value point and there outreach team?
- A description of the proposed steps to increase on-line travel reservation?

### **3.6 ROUND 1 NEXT STEP DETERMINATION**

DAS may determine the Apparent Successful Proposer at the conclusion of Round 1 evaluation, or DAS may conduct additional rounds of competition if in the best interest of the State and Participating Entities. Additional rounds of competition may consist of, but will not be limited to:

- Establishing a Competitive Range
- Presentations/Demonstrations/Additional Submittal Items
- Interviews
- Best and Final Offers

### **3.7 ROUND 1 COMPETITIVE RANGE**

#### **3.7.1 Competitive Range Determination**

Proposers with the 3 highest scoring Round 1 Proposals will advance to Round 2. DAS may increase or decrease the number of Proposers advancing to Round 2 if there is a

natural break in the scores. No more than the highest 5 scoring proposers will be interviewed. DAS will post a notice in ORPIN of the Competitive Range Determination for Round 1, which includes the Proposers advancing to Round 2.

### **3.7.2 Competitive Range Protest**

Proposers excluded from Round 2 may submit a Written protest of Competitive Range. Protests must:

- Be emailed to the SPC;
- Reference the RFP number;
- Identify Proposer's name and contact information;
- Be sent by an authorized representative
- State the reason for the protest;
- Be received by the due date and time identified in the Notice of Competitive Range; and

DAS will address all protests within a reasonable time and will issue a Written decision to the respective Proposer. Protests that do not include the required information may not be considered by DAS.

## **3.8 ROUND 2 PROCUREMENT PROCESS**

### **3.8.1 Presentations / Demonstrations**

Proposers progressing to Round 2 will be invited to participate in Proposer presentation/demonstrations. Proposers will be notified in writing, either by hard copy or electronically. The notification will provide information about the specific time and location of the presentation/demonstrations. Presentation/demonstrations may be in person at a location determined by DAS; however, DAS may elect to conduct presentations/demonstrations via teleconference or video conference. Proposers will be provided an opportunity to provide clarification or further detail to their proposal submitted and respond to questions pertaining to the needs of the RFP. Further details will be included with Notice of Competitive Range.

## **3.9 ROUND 2 SUBMITTAL REQUIREMENTS**

Proposal must address each of the items listed in this section set forth in this RFP. A Proposal that merely offers to provide the goods or services as stated in this RFP will be considered non-Responsive to this RFP and will not be considered further.

### **3.9.1 Cost Methodology**

Proposer must submit a recommended methodology and description for Product and Services available. Prices must not be included in this methodology. If needed, additional instructions would be sent out after the Round 1 Notice of Competitive Range.

## **3.10 ROUND 2 EVALUATION PROCESS**

### 3.10.1 Competitive Range Determination

Proposers with the 3 highest scoring Round 2 Proposals will advance to Round 3. DAS may increase or decrease the number of Proposers advancing to Round 2 if there is a natural break in the scores. No more than the highest 3 scoring proposers will advance. DAS will post a notice in ORPIN of the Competitive Range Determination for Round 2, which includes the Proposers advancing to Round 3.

### 3.10.2 Responsiveness Determination

Proposers invited to present/demonstrate will be evaluated by a committee as described below:

### 3.10.3 Evaluation Criteria

Round 2 Proposers will be independently evaluated by the members of the evaluation committee. Evaluators will assign a score of 0 to 5 for each evaluation criterion listed below in this section. The assigned score from each evaluator will be averaged for each item, and that number will be used as a percentage multiplier of the maximum possible points for that item. 1=20%, 3=60%, 5=100%, etc.

SCORE	EXPLANATION
5	Outstanding - Response exceeds all of the requirements and has demonstrated in a clear and concise manner a thorough knowledge and understanding of the subject matter and project. The Proposer provides superior insight into its expertise, knowledge, and understanding of the subject matter.
4	Good – Response meets all of the requirements and Response provides useful information, while showing experience and knowledge within the category. Response demonstrates above average knowledge and ability with no apparent deficiencies noted.
3	Adequate – Response meets minimum requirements in an adequate manner. Response demonstrates an ability to comply with guidelines, parameters, and requirements with no additional information put forth by the Proposer.
2	Fair – Response meets most but not all requirements in an adequate manner. Response did not demonstrate the ability to comply with all of the guidelines, parameters, and requirements.
1	Poor – Response does not meet most of the minimum requirements and does not demonstrate the expertise, knowledge, and understanding of the subject matter.
0	RESPONSE OF NO VALUE – An unacceptable response that does not meet any of the requirements set forth in the RFP. Proposer has not demonstrated knowledge of the subject matter.

## 3.11 ROUND 2 NEXT STEP DETERMINATION

DAS may determine the Apparent Successful Proposer at the conclusion of Round 2 evaluation, or DAS may conduct additional rounds of evaluation if in the best interest of the State. Additional rounds of evaluation may consist of, but will not be limited to:

- Establishing a Competitive Range
- Presentations/Demonstrations/Additional Submittal Items
- Interviews
- Best and Final Offer

### **3.11.1 Competitive Range Protest**

Proposers excluded from Round 2 may submit a Written protest of Competitive Range. Protests must:

- Be emailed to the SPC;
- Reference the RFP number;
- Identify Proposer's name and contact information;
- Be sent by an authorized representative
- State the reason for the protest; and
- Be received by the due date and time identified in the Notice of Competitive Range.

DAS will address all protests within a reasonable time and will issue a Written decision to the respective Proposer. Protests that do not include the required information may not be considered by DAS.

## **3.12 ROUND 3 – PROPOSAL CONTENT REQUIREMENTS**

Round 3 is intended to be the cost submission portion. Instructions as to what and how to submit a Cost Proposal will be sent out after the Round 2 Notice of Competitive Range.

## **3.13 ROUND 3 EVALUATION PROCESS**

Proposers invited to Round 3 will be asked to provide a cost matrix and other information as will be defined and sent out after the Round 2 Notice of Competitive Range.

## **3.14 COST EVALUATION**

Cost evaluation will be defined and sent out after the Round 2 Notice of Competitive Range.

## **3.15 ROUND 3 NEXT STEP DETERMINATION**

DAS may determine the Apparent Successful Proposer at the conclusion of Round 3 evaluation, or DAS may conduct additional rounds of evaluation if in the best interest of the State. Additional rounds of evaluation may consist of, but will not be limited to:

- Establishing a Competitive Range

- Presentations/Demonstrations/Additional Submittal Items
- Interviews
- Best and Final Offer

If DAS elects to conduct additional Rounds, DAS will notify all Proposers advancing to any such additional Rounds of the requirements and process related to the Round.

### 3.16 POINT AND SCORE CALCULATIONS

Scores are the values (0 through 5) assigned by each evaluator.

Points are the total possible value for each section as listed in the table below.

The SPC will average all scores for each evaluation criterion. The average score will be used as a percentage multiplier of the maximum possible points for that criterion. 1=20%, 3=60%, 5=100%, etc.

Cost points are calculated as stated in the Cost Evaluation section. Points possible are as follows:

<b>TOTAL POINTS POSSIBLE :</b>		<b>845</b>
<b>ROUND 1 POINTS POSSIBLE</b>		
3.4.3	Company History / Experience	60
3.4.4	Services Provided	90
3.4.5	Additional Travel Related Services Provided	50
3.4.6	Implementation/ Onboarding	80
3.4.7	Program Management	75
3.4.8	Program outreach	70
3.4.9	References	30
<b>ROUND 2 POINTS POSSIBLE</b>		
3.8.1	Presentation/Demonstration	70
3.9.1	Cost Methodology	75
3.14	<b>ROUND 3 COST POINTS POSSIBLE</b>	<b>245</b>

#### EXAMPLE:

Proposer A receives scores of 5, 4, and 3 for a criterion worth 50 points. The SPC averages 5, 4, and 3 for a score of 4. 4 multiplied by 2 is used as a 80% multiplier to the possible points of 50. 50 multiplied by 80% is 40. Proposer A's points for the criterion is 40.

### 3.17 RANKING OF PROPOSERS

SPC will rank all Proposers advancing through all rounds of evaluation. The SPC will total the final average score (calculated by totaling the points awarded by each Evaluation Committee member and dividing by the number of members) from all rounds of competition, together with references, and final cost. SPC will determine rank order for each respective Proposal and Proposer, with the highest score receiving the highest rank, and successive rank order determined by the next highest score.

## SECTION 4: AWARD AND NEGOTIATION

### 4.1 AWARD NOTIFICATION PROCESS

#### 4.1.1 Award Consideration

DAS, if it awards a Master Agreement, shall award a Master Agreement to the highest ranking Responsible Proposer(s) based upon the scoring methodology and process described in Section 3. DAS may award less than the full Scope defined in this RFP.

#### 4.1.2 Intent to Award Notice

DAS will post notice that DAS intends to award a Master Agreement to the selected Proposer(s) subject to successful negotiation of any negotiable provisions.

### 4.2 INTENT TO AWARD PROTEST

#### 4.2.1 Protest Submission

An Affected Offeror shall have 7 calendar days from the date of the intent to award notice to file a Written protest.

A Proposer is an Affected Offeror only if the Proposer would be eligible for Master Agreement award in the event the protest was successful and is protesting for one or more of the following reasons as specified in ORS 279B.410:

- All higher ranked Proposals are non-Responsive.
- DAS has failed to conduct an evaluation of Proposals in accordance with the criteria or process described in the RFP.
- DAS abused its discretion in rejecting the protestor's Proposal as non-Responsive
- DAS's evaluation of Proposals or determination of award otherwise violates ORS Chapter 279B or ORS Chapter 279A.

If DAS receives only one Proposal, DAS may dispense with the intent to award protest period and proceed with Master Agreement Negotiations and award.

##### 4.2.1.1 Protests must:

- Be delivered to the SPC via email or hard copy
- Reference the RFP number

- Identify prospective Proposer's name and contact information
- Be signed by an authorized representative
- Specify the grounds for the protest
- Be received within 7 calendar days of the intent to award notice

#### **4.2.2 Response to Protest**

DAS will address all timely submitted protests within a reasonable time and will issue a Written decision to the respective Proposer. Protests that do not include the required information may not be considered by DAS.

### **4.3 APPARENT SUCCESSFUL PROPOSER SUBMISSION REQUIREMENTS**

#### **4.3.1 Insurance**

Prior to execution of the Master Agreement, the apparent successful Proposer shall secure and demonstrate to Lead State proof of insurance coverage meeting the requirements identified in the RFP or as otherwise negotiated. Participating Entities may require additional insurance coverage.

Failure to demonstrate coverage may result in DAS terminating Negotiations and commencing Negotiations with the next highest ranking Proposer. Proposer is encouraged to consult its insurance agent about the insurance requirements contained in Insurance Requirements (Exhibit C of Attachment A) prior to Proposal submission.

#### **4.3.2 Taxpayer Identification Number**

The apparent successful Proposer shall provide its Taxpayer Identification Number (TIN) and backup withholding status on a completed W-9 form if either of the following applies:

- When requested by Lead State (normally in an intent to award notice), or
- When the backup withholding status or any other information of Proposer has changed since the last submitted W-9 form, if any.

Participating Entity will not make any payment until Lead State has a properly completed W-9.

#### **4.3.3 Tax Certification**

Prior to execution of the Master Agreement, the apparent successful Proposer shall complete and submit the Tax Certification (Attachment E) to demonstrate compliance with Oregon Tax Laws.

Failure to demonstrate compliance may result in a finding of non-responsibility.

#### **4.3.4 Business Registry**

If selected for award, Proposer shall be duly authorized by the State of Oregon to transact business in the State of Oregon before executing the Master Agreement. The selected Proposer shall submit a current Oregon Secretary of State Business registry number, or

an explanation if not applicable.

All Corporations and other business entities (domestic and foreign) must have a Registered Agent in Oregon. See requirements and exceptions regarding Registered Agents. For more information, see Oregon Business Guide, How to Start a Business in Oregon and Laws and Rules. The titles in this subsection are available at the following Internet site: <http://www.filinginoregon.com/index.htm>.

#### **4.4 MASTER AGREEMENT NEGOTIATION**

##### **4.4.1 Negotiation**

After selection of a successful Proposer, DAS may negotiate only the following terms and conditions:

- Term of Master Agreement (and renewal or extension of Term)
- Termination
- Scope of Services (Exhibit A)
- Delivery and Acceptance of Services
- Prices or Consideration (Exhibit A)
- Limited Liability
- Insurance

No other provisions of the Sample Master Agreement are negotiable.

In the event that the parties have not reached mutually agreeable terms within 14 calendar days, DAS, at its discretion, may terminate Negotiations and commence Negotiations with the next highest ranking Proposer.

##### **4.4.2 PARTICIPATING ADDENDUM NEGOTIATION**

Each Participating State may negotiate the terms of its Participating Addendum with Contractor. As a courtesy to Proposers, some Participating State specific Terms and Conditions are provided in Attachments to this RFP. These terms and conditions are being provided as a courtesy to Proposers to indicate which additional terms and conditions may be incorporated into the state Participating Addendum after award of the Master Agreement. The Lead State will not address questions or concerns or negotiate other States' terms and conditions. The Participating States shall negotiate these terms and conditions directly with the Contractor.

## **SECTION 5: ADDITIONAL INFORMATION**

### **5.1 COBID PARTICIPATION- SOCIOECONOMIC PROGRAM SUPPORT**

Pursuant to Oregon Revised Statute (ORS) Chapter 200, and as a matter of commitment, DAS encourages the participation of minority, women, service disabled veteran owned and emerging small business enterprises in all contracting opportunities. It is very important to Oregon to support its local businesses and various socioeconomic programs including but

not limited to the Certification Office for Business Inclusion and Diversity (COBID) registered firms. DAS also encourages joint ventures or subcontracting with minority, women, and emerging small business enterprises. For more information please visit <http://www.oregon.gov/gov/MWESB/Pages/index.aspx>

If the Master Agreement results in subcontracting opportunities, the successful Proposer may be required to submit a completed COBID Outreach Plan (Attachment G) prior to execution.

## **5.2 GOVERNING LAWS AND REGULATIONS**

This RFP is conducted by the Lead State of Oregon, Department of Administrative Services, Procurement Services, in accordance with the Lead State Procurement Code. These are available at <http://www.oregon.gov/DAS/EGS/ps/Pages/ors279-menu.aspx>. This procurement is governed by the laws of the State of Oregon. Venue for any administrative or judicial action relating to this RFP, evaluation and award is the Circuit Court of Marion County for the State of Oregon; provided, however, if a proceeding must be brought in a federal forum, then it must be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this Section be construed as a waiver by the State of Oregon of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the eleventh amendment to the Constitution of the United States or otherwise, to or from any Claim or consent to the jurisdiction of any court.

## **5.3 OWNERSHIP/PERMISSION TO USE MATERIALS**

All Proposals submitted in response to this RFP become the Property of Lead State. By submitting an Proposal in response to this RFP, Proposer grants the Lead State and Participating Entities a non-exclusive, perpetual, irrevocable, royalty-free license for the rights to copy, distribute, display, prepare derivative works of and transmit the Proposal solely for the purpose of evaluating the Proposal, negotiating an Agreement, if awarded to Proposer, or as otherwise needed to administer the RFP process, and to fulfill obligations under Oregon Public Records Law (ORS 192.410 through 192.505). Proposals, including supporting materials, will not be returned to Proposer unless the Proposal is submitted late.

## **5.4 CANCELLATION OF RFP; REJECTION OF PROPOSALS; NO DAMAGES.**

Pursuant to ORS 279B.100, DAS may reject any or all Proposals in-whole or in-part, or may cancel this RFP at any time when the rejection or cancellation is in the best interest of the Lead State or Participating Entity, as determined by Lead State. Neither the Lead State nor Participating Entity is liable to any Proposer for any loss or expense caused by or resulting from the delay, suspension, or cancellation of the RFP, award, or rejection of any Proposal.

## **5.5 COST OF SUBMITTING A PROPOSAL**

Proposer shall pay all the costs in submitting its Proposal, including, but not limited to, the costs to prepare and submit the Proposal, costs of samples and other supporting materials,

costs to participate in demonstrations, or costs associated with protests.

## **SECTION 6: LIST OF ATTACHMENTS**

- ATTACHMENT A SAMPLE MASTER AGREEMENT
  - Exhibit A Scope of Services
  - Exhibit B Form Participating Addendum
  - Exhibit C Insurance Requirements
  - Exhibit D NASPO Terms and Conditions
- ATTACHMENT B AFFIDAVIT OF TRADE SECRET
- ATTACHMENT C PROPOSER CERTIFICATION SHEET
- ATTACHMENT D PROPOSER INFORMATION SHEET
- ATTACHMENT E TAX CERTIFICATION
- ATTACHMENT F REFERENCE CHECK FORM
- ATTACHMENT G COBID OUTREACH PLAN
- ATTACHMENT H STATE OF OREGON PARTICIPATING ADDENDUM
- ATTACHMENT I STATE OF HAWAII PARTICIPATING ADDENDUM