



IPA

Request For Proposals (RFP)

No. IPA/RFP/G-OPS/001/2022

Provision of Travel Management Services

Issue Date: Monday 25th July 2022

WARNING: Prospective Offerors who have received this document from a source other than from link to poverty-action.org/publication/rfp-travel-management-services-july-2022 should immediately contact global-procurement@poverty-action.org and provide their name and mailing address in order that amendments to the RFP or other communications can be sent directly to them. Any prospective Offeror who fails to register their interest assumes complete responsibility in the event that they do not receive communications prior to the closing date. Any amendments to this solicitation will be issued and posted (poverty-action.org/publication/rfp-travel-management-services-july-2022)

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Synopsis of the RFP

RFP No.	IPA/RFP/G-OPS/001/2022
RFP Issue Date	Monday 25th July 2022
Title	Provision of Travel Management Services
Issuing Office	Innovation for Poverty Action 655 15th St. NW, Suite 800 Washington, DC 20005
Deadline for Receipt of Questions	Friday 5th August 2022 at 11:00 pm (EST) Responses to questions will be shared within 72 hours after the closure of the clarification window.
Point of Contact for Questions	global-procurement@poverty-action.org
Deadline for Receipt of Proposals	Friday, 2nd September 2022 at 11:00 pm (EST)
Proposal Submission Address	https://app.smartsheet.com/b/form/ca03e31cc9ea42f3b116f3ee5158b6c6
Vendors presentations anticipated date	TBD, in mid to late September
Vendor selection anticipated date	TBD, in mid to late October
Anticipated Award Type	The successful bidder shall be contracted for an initial probationary period of one year, renewable up to 2 more years. Explicit agreement will be needed to extend contract beyond 3 years upon satisfactory evaluation of performance.
Basis for Award	The award will be issued to the responsible and reasonable offeror who provides the best value to IPA and its client using a combination of technical and cost/price factors.

1. Introduction and Purpose

1.1 Background

Innovations for Poverty Action (IPA) is a research and policy nonprofit that creates and shares evidence, while equipping decision-makers to use evidence to reduce poverty. With a presence in 22 countries in Africa, Asia, and Latin America, IPA leads the field of development in cutting-edge research quality, innovation, and impact.

1.2 Purpose

IPA invites qualified and interested Travel Agencies to submit proposals for Provision of Travel Management Services.

1.3 Issuing Office

The Issuing Office and Contact Person noted in the above synopsis is the sole point of contact at IPA for purposes of this RFP. Any prospective offeror who fails to register their interest with this office assumes complete responsibility if they do not receive direct communications (amendments, answers to questions, etc.) prior to the closing date.

1.4 Type of Award Anticipated

The successful bidder shall be contracted for an initial probationary period of one year, renewable up to 2 more years. Explicit agreement will be needed to extend contract beyond 3 years upon satisfactory evaluation of performance.

This award type is subject to change during the course of negotiations.

2. General Instructions to Offerors

2.1 General Instructions

"Offeror", "Subcontractor", and/or "Bidder" means a firm proposing the work under this RFP. "Offer" and/or "Proposal" means the package of documents the firm submits to propose the work.

Offerors wishing to respond to this RFP must submit proposals in English, in accordance with the following instructions. Offerors are required to review all instructions and specifications contained in this RFP. Failure to do so will be at the Offeror's risk. If the solicitation is amended, then all terms and conditions not modified in the amendment shall remain unchanged.

Issuance of this RFP in no way obligates IPA to award a subcontract or purchase order. Offerors will not be reimbursed for any costs associated with the preparation or submission of their proposal. IPA shall in no case be responsible or liable for these costs.

Proposals are due no later than **Friday, 2nd September 2022 at 11:00 pm (EST)**, to be submitted to <https://app.smartsheet.com/b/form/ca03e31cc9ea42f3b116f3ee5158b6c6>. Late offers will be rejected.

The submission of a proposal to IPA in response to this RFP will constitute an offer and indicates the Offeror's agreement to the terms and conditions in this RFP and any attachments hereto. IPA reserves the right not to evaluate a non-responsive or incomplete proposal.

2.2 RFP Calendar

- **RFP Issue Date** Monday 25th July 2022
- **Deadline for Receipt of Questions** Friday 5th August 2022 at 11:00 pm (EST)
- **Deadline for Receipt of Proposals** Friday 2nd September 2022 at 11:00 pm (EST)
- **Vendors presentations anticipated date** TBD, in mid to late September
- **Vendor selection anticipated date** TBD, in mid to late October

2.3 Proposal Cover Letter

A cover letter shall be included with the proposal on the Offeror's company letterhead with a duly authorized signature and company stamp/seal. A sample of a [Proposal Cover Letter](#) can be found at the end (RFP Attachments). The cover letter shall include the following items:

- The Offeror will certify a validity period of ninety (90) days for the prices provided.
- Acknowledge the solicitation amendments received.

2.4 Questions regarding the RFP

Each Offeror is responsible for reading and complying with the terms and conditions of this RFP. Requests for clarification or additional information must be submitted to the "point of contact for questions" email specified in the Synopsis above. No questions will be answered by phone. Any verbal information received from an IPA employee or other entity shall not be considered as an official response to any question regarding this RFP.

Responses to questions will be shared within 72 hours after the closure of the clarification window.

3. Instructions for the Preparation of Technical Proposals

3.1 Required sections

Technical proposals shall include the following contents:

1. Mandatory Section

The Service provider must describe and explain how and why they are the best entity that can deliver the requirements of IPA indicating the following:

- a) Profile – describing the nature of the business, field of expertise, licenses, certifications (IATA reg., BSP, accreditations, association/affiliation with any other Travel Agency,
 - b) Business Licenses – Certificate of Registration/Incorporation, Tax Certificates etc.
 - c) Audited Financial Statements for last 3 years
 - d) Written self-declaration that the company is not barred by the OFAC, the UN Security Council, EU, UK, World Bank etc.
 - e) Litigation – Does your company have any pending or threatened litigation? If yes, provide details.
2. **Expertise of the firm** – Refers to Bidders track record and experience, industry awards, qualifications of key personnel. Provide a list of at least five (5) recent awards of similar scope and duration. The information shall be supplied as a table ([sample provided in Attachments](#)), and shall include the legal name and address of the organization for which services are/were performed, a description of work performed, the duration of the work and the value of the contract, description of any problems encountered and how it was resolved, and a current contact phone number of a responsible and knowledgeable representative of the organization. See Attachments.
3. **Technical Approach** - Includes the bidder’s approach towards the service required, bidder’s management plan, bidder’s proposed technology, bidder’s overall resources, operation quality assurance review mechanisms, risk/mitigation measures etc.

3.2 Services Specified

For this RFP, IPA is in need of the services described in Attachment: [Scope of Work \(SoW\)](#).

4. Instructions for the Preparation of Cost/Price Proposals

4.1 Cost/Price Proposals

Provided in the Attachments section of this RFP is a template for the [Price Schedule for firm-fixed price awards](#). Offerors shall complete the template including as much detailed information as possible. Any required payment terms must be included in the cost proposal.

It is important to note that all applicable taxes MUST be included. The Subcontractor is responsible for all applicable taxes and fees, as prescribed under the applicable laws for income, compensation, permits, licenses, and other taxes and fees due as required.

5. Basis of Award

5.1 Evaluation Criteria

Each proposal will be evaluated and scored against the evaluation criteria and evaluation sub-criteria, which are stated in the table below.

Evaluation Criteria	Evaluation Sub-criteria (if needed)	Maximum Points
Eligibility	<p>Refers to the tenderer’s ability to demonstrate eligibility to offer required service, compliance with statutory business requirements in country of operation, compliance to required disclosures and certification, etc.</p> <p>Vendors will be assessed on evidence provided for experience over the past 3 years; authority to conduct business; compliance to state Tax requirement; Relevant state authorization/licenses and general completeness of the bids.</p> <p>a) Profile – describing the nature of the business, field of expertise, licenses, certifications (IATA reg., BSP, accreditations, association/affiliation with any other Travel Agency,</p> <p>b) Business Licenses – Certificate of Registration, Tax Certificates</p> <p>c) Audited Financial Statements for the last 3 years</p> <p>d) Written self-declaration that the company is not barred by the OFAC, the UN Security Council, EU, UK, World Bank etc.</p> <p>e) Litigation – Does your company have any pending or threatened litigation? If yes, provide details.</p>	Mandatory
Technical Approach (Expertise of the firm)	<p>Refers to Bidders ability to demonstrate relevant experience and technical knowledge of the services required as stated in the Scope of Work.</p> <p><u>Track record and experience:</u> Evaluated on information provided regarding bidder’s corporate experience during the last 3 years. This will include an assessment of the number of tickets sold and turnover by airline and an assessment of clients with similar requirements to IPA.</p> <p><u>Industry Awards:</u> List the industry awards received during the past three years.</p> <p><u>Qualifications of key personnel:</u> proposed for this contract: Provide CVs indicating service industry experience Proficiency in written and oral English language required.</p>	20

<p>Technical Approach (Methodology , Quality Assurance mechanisms, reporting)</p>	<p>A detailed description on how the service is going to be delivered. This should cover delivery approach, methodology work plan and quality of service provision.</p> <p><u>Approach to the service/work required:</u> An assessment of the methodology and approach the company will take to achieve the Scope of Work, including standard operating procedures [itinerary design, use of budget airlines], keeping in mind both the environment and various service requirements.</p> <p><u>Operation Quality Assurance Review mechanisms:</u> The assessment shall also appraise the methodology and details of the bidders internal and quality assurance review mechanisms [ISO/industry specific certification].</p> <p>Performance standards and key performance indicators must be established for the contract, with client satisfaction as a key focus.</p> <p><u>Risk/Mitigation Measures:</u> The assessment will also look at the bidders' understanding of potential risks in performing this service, which may impact on the achievement and quality of the expected results. and the measures that will be put in place to mitigate these risks.</p>	<p>30</p>
<p>Cost</p>	<p>A review of financial health of the organization will be conducted based on provided most recent three (3) years financial statements.</p> <p>From the financially healthy bidders, lowest vendor will be awarded full score with other competing bids' scores pro-rated based on the applicable full score.</p>	<p>25</p>
<p>Others</p>	<p>Other factors, including completeness of proposal, adherence to RFP instructions, other relevant factors not considered elsewhere</p>	<p>5</p>
<p>Post-Qualification</p>	<p><u>Presentation / due diligence:</u> An assessment of the company's presentation IPA and due diligence including reference checks will be conducted as part of the evaluation process for firms that reach the final stage of the selection process.</p>	<p>20</p>
<p>Total</p>	<p>100</p>	

5.2 Proposal Format & Requirements

In order to securely submit proposal information and to ensure that your proposal will be properly evaluated, you are asked to submit your proposal according to the format in the evaluation criteria.

5.3 Best Value Determination

IPA will review all proposals and make an award based on the technical and cost evaluation criteria stated above and select the offeror whose proposal provides the best value to IPA. IPA may also exclude an offer from consideration if it determines that an Offeror is "not responsible", i.e., that it does not have the management and financial capabilities required to perform the work required.

IPA may award to an Offeror without discussions. Therefore, the initial offer **must contain the Offeror's best price and technical terms.**

5.4 Responsibility Determination

IPA will not enter into any type of agreement with an Offeror prior to ensuring the Offeror's responsibility. When assessing an Offeror's responsibility, the following factors are taken into consideration:

1. Must provide evidence of the required business licenses to operate in the host country.
Ex. Business registration documents, Valid Tax Compliance Certificate, Proof of registration as an IATA agent
2. Must be Knowledgeable about Fly America Act policies and exemptions
3. Must have adequate financial resources to finance and perform the work or deliver goods or the ability to obtain financial resources without receiving advance funds from IPA.
4. Must have the ability to offer flexible service model (with 24-hour support).
5. Must have a satisfactory past performance record.
6. Must have a satisfactory record of integrity and business ethics.
7. Must have the necessary organization, experience, accounting and operational controls and technical skills.
8. Must be qualified and eligible to perform work under applicable laws and regulations.

6. Inspection & Acceptance

The designated IPA staff will inspect from time to time the services being performed to determine whether the activities are being performed in a satisfactory manner. The subcontractor shall be responsible for any countermeasures or corrective action, within the scope of this RFP, which may be required by the IPA Global Operations Director or other representative as a result of such inspection.

7. Compliance with Terms and Conditions

7.1 General Terms and Conditions

Offerors agree to comply with the general terms and conditions for an award resulting from this RFP. The selected Offeror shall comply with all Terms and Conditions listed in the accompanying [Attachment](#).

8. Procurement Ethics

Neither payment nor preference shall be made by either the Offeror, or by any IPA staff, in an attempt to affect the results of the award. IPA treats all reports of possible fraud/abuse very seriously. Acts of fraud or corruption will not be tolerated, and IPA employees and/or subcontractors/grantees/vendors who engage in such activities will face serious consequences. Any such practice constitutes an unethical, illegal, and corrupt practice and either the Offeror or the IPA staff may report violations to the Toll-Free Ethics and Compliance Anonymous Hotline at +1 844 837 5445. IPA ensures anonymity and an unbiased, serious review and treatment of the information provided. Such practice may result in the cancellation of the procurement and disqualification of the Offeror's participation in this, and future, procurements.

By submitting an offeror, Offerors certify that they have not/will not attempt to bribe or make any payments to IPA employees in return for preference, nor have any payments with Terrorists, or groups supporting Terrorists, been attempted.

9. Attachments

9.1 Scope of Work for Services or Technical Specifications

1. Objective

IPA is seeking proposals from travel agencies interested in providing Travel Management Services.

2. Contractual Arrangements

The successful bidder shall be contracted for an initial probationary period of one year, renewable up to 2 more years. Explicit agreement will be needed to extend contract beyond 3 years upon satisfactory evaluation of performance.

The contract shall not set a minimum guarantee on volume sales on the part of IPA, nor will IPA or the Travel Agency be allowed to impose such a guarantee of volume any time before or during the contract period.

IPA shall, from time to time, evaluate and verify with other travel agencies and other industry indicators the comparability and competitiveness of the rates being given to IPA. IPA retains the right to terminate the Agreement with the selected travel agent at any time if it finds that the latter has charged IPA higher rates than market standards, does not render the minimum services described in this tendering document or its performance is below satisfactory.

IPA recognizes the importance of confidentiality of the data provided: the proposal information and the travel itineraries and reservations of its travelers. Accordingly, the selected agency must keep confidential all dealings with IPA.

3. IPA's Travel Policy basic principles

The following principles guide IPA travel planning:

- **Efficiency and Impact:** IPA encourages staff to be thoughtful about how travel can best advance our collective agenda and impact on the ground. Consider multiple objectives when planning a trip – is combining multiple destinations useful and cost effective?
- **Effectiveness:** Travel carries benefits to our work as well as opportunity costs. IPA takes care to consider the appropriate staff composition and the right timing of travel to ensure that it advances our work.
- **Health and Safety:** IPA is concerned and invested in protecting the health and safety of our staff. Clear processes and guidelines for travel help staff to be aware of the resources available and mitigate risks.
- **Cost-consciousness:** As a non-profit organization, IPA also has a fiduciary responsibility to ensure resources are used prudently and that individuals do not incur inappropriate or excessive expenses. Proactively searching for the lowest fare and hotel accommodations within reasonable travel parameters, considering shifting dates and times to reduce costs, and being thoughtful about expenses incurred during travel can help to minimize costs.

4. Minimum Service Level Agreement

The travel agent will provide IPA with the following services as a minimum:

a. Travel Management Services.

- i. Identify flights, itinerary options and fares for destinations indicated by IPA (both domestic US flights and international flights).
- ii. IPA staff will initiate travel requests via phone, e-mail or via the agent's online booking platform (if available).
- iii. The travel agent will provide itinerary options based on price, duration, number of stops, traveler preferences or other parameters as requested by IPA.
- iv. The travel agent will book ticket airfares in compliance with IPA travel policy and only when required IPA approvals have been received.
- v. The travel agent will book ticket airfares in compliance with Fly America Act, when applicable (when flights will be funded by US funds, which IPA will clearly specify).
- vi. The travel agent will book hotel and ground transportation arrangements following IPA's approval protocol, when requested.
- vii. The travel agent will provide itinerary, reservations and ticket changes in alignment with IPA travel policy when required.

b. Hours of service

The travel agent MUST be able to offer flexible service model with 24 hour support, 7 days a week.

IPA dedicated agents shall be available to respond to urgent queries outside of standard business hours, during weekends and/or national holidays.

c. Calls

IPA will be provided with a phone number. Having the ability for our staff overseas to call through WhatsApp (or similar web application) would be preferable.

80% of incoming calls should be answered by an agent within 20 seconds.

The travel agent shall provide call statistics on a monthly basis. Reports will detail at least the following: 'Answered /Lost, 'Percentage Lost', 'Average Speed Answered'.

d. Emails

IPA will be provided with an email address, preferably dedicated, for staff to contact the agent.

The travel agent will respond to 95% of email enquiries to be managed and responded within 4 working hours. Should an email be a priority, then IPA will clearly mark priority in the Subject line of the email.

All emails shall be logged upon receipt to allow the travel agent to report against the SLA targets and provide data reporting and samples at review meetings.

e. Ticket delivery

The travel agent will issue tickets in order of departure.

Tickets will usually be e-tickets and will be emailed to the booker unless directed to do otherwise by the booker.

The travel agent will target a 24-hour turnaround time between the confirmation, payment, and /or booking and the ticket delivery.

Should IPA need tickets urgently, then they will advise the agent accordingly at the time of confirmation.

f. Complaints

The travel agent will acknowledge complaint within two (2) business days with a detailed timeframe for resolution thereof.

Where a third-party supplier is involved, the travel agent will provide IPA with regular updates every seven (7) days or as mutually agreed by the parties hereto.

g. Account Management

The travel agent will provide a dedicated Account Manager who will oversee the overall relationship between the travel agent and IPA.

h. Management information reports

The travel agent will provide IPA access to all the agent's standard reports.

The travel agent will develop more specific reports on behalf of IPA based on IPA's requirements and at IPA's request, if customized reports are required by IPA.

i. Technology

IPA prefers to work with agents whose platforms allow for 1) configurations of the user interface for IPA's needs such as operational and financial coding entered by staff, 2) two-way integration with IPA systems through REST APIs (preferred) or other means to support configuration, operational, and reporting needs, and 3) SAML-based single sign-on.

Please describe your capabilities in each of these three areas.

j. Training

The travel agent will provide training to the Global Operations team at agreeable periods when required including but not limited to online tools, such as Profile Manager and online bookings.

k. Account Management review meetings

The travel agents Account Manager will discuss with IPA at least quarterly for an official service review.

l. Contingency Plans

In addition, the travel agency shall have a contingency replacement plan during periods of vacations and/or illness of the focal point(s) and Account Manager assigned to IPA. In case of emergency (e.g. natural disasters, war), the travel agency should have a continuity plan enabling it to support IPA operations.

* Note: Bidders who will be short-listed may be invited to conduct a presentation and respond to queries of IPA Evaluation Committee.

5. IPA's Approximate Travel Volume

We estimate that the selected vendor can expect a trajectory of at least \$300 to \$400 K annual air volume once travel patterns normalize but should have the capacity to support additional travel bookings if we expand our scope at a later date.

This data is presented to assist in pricing of the RFP and does not represent a commitment of any kind by IPA.

9.2 Proposal Cover Letter (sample)

[On Firm's Letterhead]

<Insert date>

TO: Innovations for Poverty Action
[Address]

We, the undersigned, provide the attached proposal in accordance with **RFP-(insert number)**. issued on **(Insert date)**. Our attached proposal is for the total price of **(Sum in Words)**.

I certify a validity period of **(enter number)** days for the prices provided in the attached Price Schedule/Bill of Quantities. Our proposal shall be binding upon us subject to the modifications resulting from any discussions.

We understand that IPA is not bound to accept any proposal it receives.

Yours sincerely,

Authorized Signature:

Name and Title of Signatory:

Name of Firm:

Address:

Telephone:

Email:

Company Seal/Stamp:

9.3 Price Schedule (sample)

Please fill this table with your cost in USD for each of these items and add any other line that you consider appropriate.

Item Number	Description	Cost in USD	Remarks
1.	Reservations and Ticketing		
	Domestic Air Ticket		
	International Air Ticket		
	Hotel Reservation		
	Car Rental		
	Amtrak / Rail		
	Modification / Change		
	Void		
	Cancellation		
	Refund		
2.	Implementation		
	Online Booking Tool Configuration		
3.	Account Management		
	Scheduled Annual / Quarterly Reviews		

9.4 Past Performance Form (sample)

Include projects that best illustrate your work experience relevant to this RFP, sorted by decreasing order of completion date.

Projects should have been undertaken in the past three years. Projects undertaken in the past six years may be taken into consideration at the discretion of the evaluation committee.

#	Description of Activities	Name of The Company	Name of The Contact Person	Designation	Telephone Number	Email Address	Contract Value
1							
2							
3							
4							
5							

9.5 Terms and Conditions

- a) The Request for Proposal is not and shall not be considered an offer by IPA.
- b) All responses must be received on or before the date and time indicated on the RFP.
- c) All proposals will be considered binding offers. Prices proposed must be valid for entire period provided by respondent.
- d) All awards will be subject to IPA contractual terms and conditions and contingent on the availability of donor funding.
- e) IPA reserves the right to accept or reject any proposal or cancel the solicitation process at any time and shall have no liability to the proposing organizations submitting proposals for such rejection or cancellation of the request for proposals.
- f) IPA reserves the right to accept all or part of the proposal when award is provided.
- g) All information provided by IPA in this RFP is offered in good faith. Individual items are subject to change at any time, and all bidders will be provided with notification of any changes. IPA is not responsible or liable for any use of the information submitted by bidders or for any claims asserted therefrom.
- h) IPA reserves the right to require any bidder to enter into a non-disclosure agreement.
- i) The bidders are solely obligated to pay for any costs, of any kind whatsoever, which may be incurred by bidder or any third parties, in connection with the Response. All responses and supporting documentation shall become the property of IPA, subject to claims of confidentiality in respect of the response and supporting documentation, which have been clearly marked confidential by the bidder.