



REQUEST FOR PROPOSAL
for
Travel Management Services



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I. General Terms and Conditions of the Request for Proposal

Posting Date: May 2, 2022

Proposal submission deadline: May 23, 2022, 5:00 pm EST

Parameters

No recipient of this RFP is authorized to approach any carrier, service provider or other outside party for any purpose in connection with this RFP, regardless of any current or prior relationship with IREX. IREX reserves the right to disqualify any proposal for failure to comply with this requirement. Recipients of this RFP are responsible for all expenses associated with proposal preparation and presentation, including travel.

If you have questions regarding this RFP or desire additional information, please contact Khadija JonesMoore, Operations Coordinator at kjonesmoore@irex.org. Questions may be submitted at any time up to the proposal due date with a 24–48-hour targeted turnaround time.

Proposals and/or any appendices received after the announced time and date of receipt will not be accepted. IREX reserves the right to request additional information at any time during the procurement process.

Format

Submittals should be presented in the following manner:

- i. Introduction
- ii. Responses to Section IV. Proposal Submission Requirements
- iii. Appendices
 - a. Signature sheet
 - b. Schedule of Fees
 - c. Additional attachments as needed

Written submissions should be kept concise and follow the order under section IV. Proposal Submission Requirements. Answers should be specific to the questions and should be written in easy to understand language. Supplemental materials can be submitted but may not be reviewed or evaluated given time constraints.

Selection and Submission

All proposals should be sent via email to the attention of **Khadija Jones-Moore, Operations Coordinator** at kjonesmoore@irex.org. The subject line shall include: "IREX Travel Management." Deadline for submission of proposals is **no later May 23, 2022, 5 :00 pm EST**. Hard copy proposals will not be accepted. All proposals will become part of the requester's files without obligation.



II. Organizational Overview

About IREX

The International Research and Exchanges Board (“IREX”) is a 501(c)(3) not-for-profit corporation established in 1968. Its headquarters office is located at 1275 K Street, NW, Washington, DC. IREX’s mission is to build a more just, prosperous, and inclusive world by empowering youth, cultivating leaders, strengthening institutions, and extending access to quality education and information.

IREX embraces a people-focused approach to development that invests in human potential and the conditions that help people to thrive. We work with partners around the world to promote more just, prosperous, and inclusive societies by engaging and empowering youth, cultivating leaders at all levels of society, strengthening institutions, and expanding access to quality education and information. You can learn more about IREX as an institution by visiting our website: www.irex.org.

Traveling both internationally and domestically is essential to IREX’s mission and the implementation of our programs. Our staff is also our most important asset, and creating a reliable, user-friendly travel management program is essential to ensuring our staff and institution’s success.

IREX has 599 full-time, part-time, and temporary employees. Our employees are located in our headquarters and nineteen (19) global offices located in Africa, Asia, Eurasia, Europe, and the Middle East. There are 278 headquarter staff members, and approximately 321 staff located in our various global offices.

Overview of IREX’s Current Travel Program

As outlined in IREX’s current travel policy (see Appendix C), IREX seeks to minimize travel expenses and achieve cost efficiency. IREX follows United States Government (USG) travel regulations, including the “[Fly America Act](#).” Travel for work on non-USG funded projects is not required to follow USG travel regulations, however travelers are still expected to minimize travel expenses and achieve cost efficiency.

IREX seeks to minimize its travel related expenses by booking economy class air, auto and hotel accommodations. IREX currently follows a very a basic process for authorizing travel and purchasing tickets. It is as follows:

1. IREX currently uses a single designated travel management vendor to book all travel both domestic and international for IREX staff, consultants and program participants.
2. All air travel originating in Washington DC, including IREX global staff coming to DC, and international travel to the United States by program participants, is made through our current travel management vendor.
3. All travel booked using IREX funds must comply with the Fly America Act where applicable.
4. IREX’s current travel management vendor is not authorized to purchase tickets until it receives appropriate documentation of travel authorization from the employee (currently an emailed pdf version of a travel authorization form completed with 2 signatures.)



5. If IREX DC employees or global staff employees are flying to the US or are arranging travel on behalf of IREX program participants, they may need price quotations for airline tickets as part of travel planning and/or proposal development and may request quotations from the IREX Travel Management Company either by telephone or email.
6. The IREX Travel Management Company is responsible for assisting in booking the following types of travel:
 - a. IREX DC Headquarters staff, individual travel coordination and booking, including booking flights between non-U.S. countries
 - b. IREX Global Staff, individual travel coordination and booking, including booking flights between non-U.S. countries
 - c. IREX bulk or high-volume individual travel coordination and booking for conferences and large meetings based in the Washington, DC area as well as those based globally.
 - i. IREX Bulk Travel or high-volume individual travel is generally for participants of programs travelling from countries across the world to cities across the United States and also to regional conferences globally. Bulk travel participants may, for instance, arrive in the U.S. on the same day, travel to a second U.S. location on the same day, but depart the U.S. on different days.
 - ii. IREX books approximately 7,000 roundtrip international and domestic tickets annually for program participants from around the world, including those from challenging environments.

While IREX does not currently utilize an online booking platform, it will complete the transition to Concur by Fall of 2022 for booking travel for IREX staff. As such, IREX is interested in receiving proposals from vendors with a proven track record supporting the implementation of Concur and helping its clients fully operationalize and leverage Concur as a travel management tool.

Please see the table below for a summary of IREX’s pre-COVID travel volume in 2019.

Category	Quantity/Details
Number of Tickets Booked for staff and program participants (2019)	6,769
Dollar Value of Tickets Booked (2019)	\$5,465,600.76
Top 3 Airlines Utilized	United Airlines Delta Lufthansa



IREX's Travel Management RFP Objective

IREX is seeking proposals from qualified Travel Management Companies as it moves towards modernization of its travel management systems and processes, and improvements in customer service and overall efficiency. Support for the IREX travel program includes, but is not limited to, support and synchronization to IREX's use and implementation of the online travel booking tool and expense report system (Concur), individual, high volume bulk travel, and third-party bookings (international and



domestic) 24/7 global employee support and supplier negotiations i.e. air carriers, hotels etc. The selected vendor will also be expected to maintain a high level of client satisfaction while helping to reduce IREX's annual travel program costs.

III. Scope of Services

The applicant should be capable of providing full travel agent services to IREX to include, at a minimum, those services listed below. The applicant should:

1. Full-service travel management program, including 24/7 access to reservations and support.
 - a. Meet the needs of the following types of travel:
 - i. IREX DC Headquarters staff, individual travel coordination and booking, including booking flights between non-U.S. countries
 - ii. IREX Global Staff, individual travel coordination and booking, including booking flights between non-U.S. countries
 - iii. Knowledgeable about Fly America Act; policies and exemptions
 - iv. Understand and advise on travel safety Covid policies world-wide
 - v. Ability to support and book group flights and ground transportation (such as Amtrak, etc.)
 - vi. Ability to manage and meet the diverse needs of various IREX programs including travel timelines, booking requirements, and tracking travel
 - vii. Accommodate surge capacity travel as well as bulk or high-volume individual travel booking for conferences and large meetings globally
2. Many of these participants may be first-time travelers and/or traveling from locations with travel restrictions. The travel vendor should be familiar with and able to advise transit visa requirements including but not limited to Schengen visa regulations that may prohibit certain routings depending on country of origin.
 - a. Manage and inform program staff and travelers about travel requirements and restrictions of our travelers, including but not limited to entry/ exit requirements, COVID requirements, airline policies and more
3. Many bookings may require multiple stops and/or layovers that should not be too long but allow sufficient time for connection.
4. Coordinate travel without splitting tickets when possible.
5. Many bookings may require travel originating from small regional and global airports, and all legs of travel should be on one ticket with the ability to check luggage through from point of origin to final destination.
6. Travel vendor should be familiar with all airline policies on baggage transfer and able to advise IREX and/or participants on requirements, particularly when connecting to in-country airlines for final legs of return travel.
7. IREX prioritizes recruiting participants with diverse needs, including physical disabilities such as mobility, hearing, vision and medical. The Travel Management Company should be well-versed in airline and airport support services and assist in making all necessary accommodations for all legs of travel.
8. The Travel Management Company should have the ability to work directly with program participants who wish to change their tickets at their own cost, processing their payments separately from IREX travel costs.
9. Increase staffing levels on a fluctuating basis, adding additional dedicated agents to handle a large



volume of tickets to be purchased in a short time period; in the past this has included the purchase of 1000 tickets from across Africa, including capital cities and regional airports, to 40 different cities across the United States on unique (non-group) bookings all purchased within a five-week time period. Other programs have required purchasing approximately 100 tickets from countries like Pakistan to the U.S. in the span of one week.

10. Travel Management Company should be able to track and monitor all flights, confirm passenger status, and ticket use, and report this information to program staff in a timely manner.
11. Participant travel routinely occurs outside of standard U.S. business hours. A dedicated agent, familiar with the program and travel needs (not a call center) should be flexible and available, particularly during high volume travel periods globally.
12. Participants should be able to contact the Travel Management Company while in transit to discuss any issues that arise throughout travel.
 - a. Fully support Concur Travel and produce reports that can be uploaded into Concur expense
 - b. Make bookings outside of Concur for bulk bookings as required.
 - c. Enforce and comply with IREX travel policies, processes, and procedures.
 - d. Deliver Concur training to team members.
 - e. Provide detailed ticket information in Excel, or another Salesforce compatible system, broken down by requested fields, including financial data, to upload into the IREX Salesforce database.
 - f. Full-service travel management program, including 24/7 access to reservations and support.
 - g. Provide online management reports.
 - h. Apply industry best practices and benchmarking for evaluation of vendor negotiations, including airline, car rental and hotels.

In all of the above cases, the TMC should provide the following services including, but not limited

- Compliance with IREX travel policies and procedures.
- All travel booked using IREX funds must comply with the Fly America Act where applicable.
- Provide booking and reservation information aimed at minimizing travel expenses and achieving cost efficiency.
- Provide an agent/s dedicated to coordinating both high volume/bulk and individual travel.
- Provide exceptional customer service in coordination of reservations and handling reservation changes as necessary.
- Responsiveness and flexibility in communications with IREX staff.
- Ability to recognize urgent situations and handle in a timely and professional manner, including after hours.
- A thorough knowledge of inter-country airlines and booking systems in IREX global office locations and/or from where program participants' flights originate.
- A thorough knowledge of the terms and relative advantages and disadvantages of different airports and transit points.
- The ability to function across time zones, 24 hours a day and provide 24 hour emergency support phone number

IV. Proposal Submission Requirements

In response to this RFP, please provide the following information:



1. Introductory letter containing the following:
 - a. Company's values, mission, and customer service approach and how they relate to your performance.
 - b. Description of experience serving mid-size International NGOs /mid-size businesses with a wide geographic footprint, stretched over numerous time zones.
 - c. Description of experience managing participant/ student travel
 - i) Provide reference for description identified above
 - d. Four references (at least two references should from international NGOs) who can attest to the firm's knowledge, quality of work, timeliness, diligence, flexibility and indicate the average annual travel volume (dollars & transactions) of each reference.
2. Based on IREX's size and split of domestic and international staff and program participants; advise how you would configure our operations (include details of your proposed configuration, the use of dedicated or shared teams, location of reservations centers, hours of operation, etc.) Please be specific particularly in regard to handling the relationship and customer service with our global staff who are located in different countries and time zones across the world. What is your flexibility in changing service configurations as needed?
3. Based on IREX number of large bookings made on behalf of program participants, please advise how you would configure operations to identify large groups of bookings with IREX staff on behalf of the travelers.
4. A brief description of the TMCs customer service performance metrics including:
 - a. Average length of time that travelers and arrangers should expect to wait for a return phone call or email with regards to their travel arrangements;
 - b. Availability of backup agents to provide to the needs of customers during busy times;
 - c. Capability to work with various time zones;
 - d. Accessibility during holidays and off-peak/nontraditional working hours; e. Etc.
5. Please provide an example of correspondence with travelers, including sample itinerary options.
6. A brief description of the policy or methods for addressing customer service issues or complaints.
I.e. if there are issues around poor service, response times, wrong tickets booked, etc., what does the agency do in response?
7. Can the agency accommodate evening bookings and after-hours flight changes? Please provide an overview of these services including additional costs if applicable.
8. Does your agency have prior experience coordinating and booking ground transportation, hotel and airline reservations for large group meeting and conference attendees? If yes, describe in detail your agency's capability for handling these types of reservations both domestically and internationally.
9. Describe your agency's experience in complying with the "Fly America Act" and how your service ensures compliance with the "Fly America Act."
10. Describe your agency's experience in and access to booking flights from local/ regional/ small airports and non-major airlines globally.
 - a. Include information about the depth and breadth of your booking ability and whether there are specific regions where this varies
11. Describe your firm's experience, in detail, supporting travel reservations via Concur Travel.
12. Describe your firm's experience, in detail, supporting an organization's transition to Concur Travel.
13. Describe your firm's handover process when transitioning between travel providers, including support to travelers currently in mid-itinerary.
14. If your organization is successful in being presented with the opportunity to provide IREX additional travel management services explain how you would implement your services by providing an implementation plan that:
 - a. Outlines major action items



- b. Provides the implementation timeframe
 - c. Contingency plan during transition (including support to IREX staff, training etc.)
15. IREX uses the services of International SOS (ISOS) as its Medical Evacuation and Emergency Assistance Services Provider. ISOS utilizes an application called Assistance Application which features Travel Tracking that interfaces and integrates with Concur Travel. The TMC should demonstrate familiarity with this application and the capability to support it if needed.
16. Please provide a description of your technology and digital security protocols to ensure that IREX travel information is secure.
17. Please provide a brief overview of the types of fares the agency has access to (i.e. humanitarian fares).
18. Provide detailed information on cost savings including incentives and soft dollar awards.
19. Describe the approach your company would take to assist us in achieving significant cost control and cost reduction.
20. Please complete the Signature Sheet (Appendix A)
21. Please complete the Schedule of Fees Chart (Appendix B)
22. Please provide a sample budget/fee structure including any one-time setup charges.

V. Proposal Evaluation Criteria

IREX reserves the right to determine which bidders have met the requirements of this RFP. In addition, IREX may reject, in whole or in part, any and all proposals, waive minor irregularities in proposals, allow a bidder to correct minor irregularities and negotiate with all responsible efforts in any matter deemed necessary to serve the best interest of IREX.

IREX reserves the right to reject any and all proposals when such rejection is in the interest of IREX, to reject the proposal of a bidder who has not met the prerequisites of the bid proposal or who has previously failed to perform properly or complete on time contracts of a similar nature, and to reject the proposal of a bidder who is not, in the sole opinion of IREX, able to perform the contract to the sole satisfaction of IREX.

IREX also reserves the right to waive any informalities and technicalities in the bidding. IREX reserves the right, however, to award the contract in accordance with its best interest and will not be required to accept the lowest bid.

IREX may, upon its discretion, establish a competitive range of qualified proposals for award consideration. IREX will not conduct discussions or negotiations with contractors who are not within the competitive range and those contractor bids will not be considered for award. IREX will assess all applicants based on, but not limited to, the following criteria:

- **Demonstrated Qualifications and Institutional Capacity.** This may include years in business providing, experience serving accounts of similar size, complexity, and volume, experience serving government contractors, experience providing backup services to account.
- **Management Plan.** Business practices and organization structure including corporate support, proactive business practices and philosophies to ensure staff are trained supported and available to meet IREX's needs. Include an overview of the structure of the account management team and how it will be structured (i.e. all HQ based, internationally based, knowledge of after-hours team of the IREX account, etc.)



- **Personnel and Staffing:** Qualifications and experience of key personnel.
- **Understanding of Scope of Services.** Innovations in providing services thru the TMCs staffing approach, technology usage and customer service approach. Approach to achieving successful day-to-day operations. Flexibility in meeting service needs and ability of business model to re- focus and adjust work processes as needed.
- **Past Performance and Related Experience.** Quality and positive feedback from references including ability to: perform scope of services specified, ability to meet schedules and needs of

Summary of Key Dates

Request for Proposal is posted	May 2, 2022
Proposal Submission Deadline, by 5:00 PM ET	May 31, 2022
Contractor Selection and Notification	June 20, 2022
Anticipated Service Start Soft Date (<i>Transition period</i>)	July 22, 2022
Anticipated Service Start Date (<i>Estimated</i>)	September 8, 2022

Qualified bidders will be alerted to any schedule changes.



Appendix A: Signature Sheet

My signature certifies that the proposal as submitted complies with all Terms and Conditions as set forth in the RFP.

To receive consideration for award, this signature sheet must be included as part of your response.

Complete Legal Name of Firm: _____

Address: _____

Federal Tax ID Number: _____

Signature of Authorized Representative: _____

Type Name and Title: _____

Primary contact person for questions and concerns relative to this project:

Contact Name and Title: _____

Phone: (_____)

Fax: (_____)

Email: _____

Appendix B: Schedule of Fees

****Please note the TMC's own template may also be utilized****

Schedule of Fees	
Available Service	Fees
Transaction Fee Per Agent Issued Ticket (International)	
Transaction Fee Per Agent Issued Ticket (Domestic)	
Transaction Fee Per On-Line Ticket (International)	
Transaction Fee Per On-Line Ticket (Domestic)	



Refund Ticketing	
Exchange Ticketing	
Voided Tickets	
International Upgrades (each way)	
Domestic Upgrades (each way)	
Reservations for free ticketing (ff miles, travel certificates, etc.)	
Itinerary Hold for Visa Purposes	
Hotel/Car Bookings	
After Hours Service (Please note typical non-after-hours hours)	
After Hour Electronic or Prepaid Ticket	
Lost Ticket Application	
Waiver Fee	
International Phone Calls	
One Time Setup Fee (Web/Internet Tools)	
Other:	



Appendix C: IREX Travel Policy