

Request for Proposals

Travel Management Company for CDC Foundation

Date Issued: February 1, 2023

Due Date: February 17, 2023, by 5:00pm Eastern Time

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1. CDC FOUNDATION

The CDC Foundation helps the Centers for Disease Control and Prevention (CDC) save and improve lives by unleashing the power of collaboration between CDC, philanthropies, corporations, organizations, and individuals to protect the health, safety and security of America and the world. The CDC Foundation is the go-to nonprofit authorized by Congress to mobilize philanthropic partners and private-sector resources to support CDC's critical health protection mission. Since 1995, the CDC Foundation has raised over \$1.6 billion and launched more than 1,200 programs impacting a variety of health threats from chronic disease conditions including cardiovascular disease and cancer, to infectious diseases like rotavirus and HIV, to emergency responses, including COVID-19 and Ebola. The CDC Foundation managed hundreds of programs in the United States and in more than 160 countries last year.

2. SUMMARY OF REQUEST

The purpose of this RFP is to contract for the services of a Travel Management Company (TMC) to manage and coordinate the official travel needs for the employees of the CDC Foundation. The CDC Foundation seeks proposals from TMCs that can demonstrate knowledge of the United States Federal Travel Regulations, including the [Fly America Act](#) and other private sector unique regulations.

Successful TMCs will have demonstrated experience, such as travel services provided to similar organizations with numerous travelers across multiple countries. Furthermore, the CDC Foundation is seeking a travel agency that will make every effort to resolve any travel-related problems or emergencies that may arise while traveling, and an agency that can demonstrate the achievement of cost savings for clients in comparable size and complexity. To be eligible, TMCs must have systems interface capacity with SAP Concur.

3. BACKGROUND

The CDC Foundation staff has ramped down a bit following the COVID-19 surge and currently has over 1500 employees across the country. At any given time, there are consultants, trainers or participants traveling on behalf of the CDC Foundation. The CDC Foundation had 4,002 total travel transactions in 2022.

3.1 Current Travel Program

Approximately 59% of travel for the CDC Foundation is International with a significant amount of travel to developing countries. The CDC Foundation saw reduced travel in Calendar Year (CY) 2020 and CY2021 due to a self-imposed travel moratorium related to COVID-19. For CY2022, the CDC Foundation saw a 45% increase in travel over CY2019. All travel is required to be ticketed through Concur, whether the transaction is initiated by a CDC Foundation employee or by the Travel Service Provider. Air Travel made up 73% of total travel spend in CY2022, making up a total of 1,990 travel transactions.

3.2 Travel Policy

The CDC Foundation takes the safety and security of its employees very seriously. All travel is required to be booked through the CDC Foundation's designated travel management system to ensure an accurate tracking of all travelers. If it is safe for employees to travel, CDC Foundation employees should book the most economical, reasonably priced means possible.

A large portion of CDC Foundation travel is funded by the US Government and therefore, travel charged to programs supported by federal funds must adhere to requirement set forth in [2 CFR 200.475 Travel Costs](#) and must also comply with the [Fly America Act](#).

Our class of service policy is that basic economy class tickets with restrictions or lowest price non-penalty economy coach tickets are to be used for the majority of travel. In general, upgrades to business class **will not** be paid for by the CDC Foundation. If a business class ticket is requested, a business class ticket can only be purchased if it is approved by the Department Head (i.e., VP or Chief) or the Department Head's designee.

4. SCOPE OF WORK

The CDC Foundation is interested in securing the highest quality of travel services, maximizing convenience for its employees while minimizing travel cost and developing a database that will give the CDC Foundation an accurate reference of its travel expenditure patterns. The TMC shall provide corporate travel services for official domestic and international travel of CDC Foundation employees.

4.1 Services

The selected TMC must:

- Have systems interface capacity with SAP Concur; 100% of air, rail, hotel, and car rental transactions must interface with Concur
- Be able to support international travel; specifically Middle East, Africa, and Asia as CDC Foundation personnel often travel to and operate in developing countries, with limited infrastructure
- Provide a business intelligence interface that will allow real-time, ad hoc reporting functionality to the CDC Foundation operations team
- Offer a Corporate Travel Tracking Tool, which allows for dashboard tracking of all deployed employees at any given time
- Adhere to less than 24 hours turnaround time on all employee travel requests
- Adhere to less than 12-hour response time on all escalation requests from CDC Foundation Corporate Point of Contacts
- Provide after hours and weekend coverage
- Offer ability to maintain defined travel rules, as set forth in the CDC Foundation Employee Travel Policy
- Offer ability to support multiple payment options including the proactive use of accrued miles and points.
- Provide dedicated Account Team for escalations and advanced levels of customer support
- Have functionality to facilitate direct payment of airfare and hotel Reservations utilizing CDC Foundation established payment method (Such as Conferma or e-Direct)
- Have ability to handle special tasking for VIP Travelers

Preference will be given to TMCs that:

- Issue and deliver e-tickets or paper tickets for air, rail, or land transportation with advance seat assignments
- Secure reservations for lodging accommodations either within GSA set per diem for domestic and international locations as directed by CDC Foundation
- Provide detailed travelers' itineraries
- Can produce management information and billing reports derived from the booking database
- Advise on necessary health requirements, including types of inoculations and vaccinations whether

required or suggested for foreign travel

- Reconcile travel charges incurred against CDC Foundation's multiple credit cards
- Collect and report total expenditures by airline/hotel chain
- Are able to provide services for approximately 4,000 total travel transactions per year

5. ELIGIBILITY REQUIREMENTS

TMCs must meet all the following eligibility criteria:

- Authorized TMC partner with SAP Concur
- Confirmation of being headquartered in US
- Confirmation of being an equal opportunity employer with an all-inclusive membership that does not discriminate based on gender, race/ ethnicity, color, sex, sexual orientation, country of national I origin or nationality, age, religion, intellectual or physical disabilities and m military or veterans tatus in its activities or operations.

The CDC Foundation reserves the right to conduct a **pre-award risk assessment** to assure TMCs meet the eligibility criteria. Data available through third party sources such as Dun & Bradstreet may be consulted, along with information publicly available via Federal and State award, debarment, exclusion, and sanction databases.

6. INSTRUCTION TO TMCS

TMCs are invited to submit a proposal in response to this solicitation. Proposals should be submitted by **February 17, 2023, by 5:00pm Eastern Time** using this [link](#).

An automated notification of receipt of the application will be generated upon submission.

The CDC Foundation reserves the right to award a contract based on initial offers, without discussion. Therefore, proposals should contain a TMCs' best solution, from cost/price and technical standpoints. The CDC Foundation may, at its discretion, invite presentations, hold panel interviews, request clarification, conduct discussions and/or solicit a best and final offer from any or all TMCs. The CDC Foundation also reserves the right to conduct a pre-award risk assessment and may request additional financial and/or organizational information from TMCs for the purpose of conducting the assessment. Review findings may impact eligibility and/or award structure.

The CDC Foundation will not be responsible for any proposal which does not follow the instructions in this RFP, and may, at its discretion, reject any such non-compliant proposal. Further, this solicitation does not commit the CDC Foundation to pay any cost for the preparation and submission of a proposal.

6.1 Proposal Section 1: Company Overview

The following information should be provided directly in the online form linked above – also found here:

<https://app.smartsheet.com/b/form/ac40b7fc50c3440cb094ad606933bd9f>

<ul style="list-style-type: none">• Legal Company Name• Abbreviated Name (if applicable)• Street Address	<ul style="list-style-type: none">• Federal Tax Identification (ID) Number/Employer Identification Number (EIN)	<ul style="list-style-type: none">• Year Established• Number of Employees• Business Classification(s)
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<ul style="list-style-type: none"> • City, State, Zip Code • Website • Primary Point of Contact 	<ul style="list-style-type: none"> • Data Universal Number System (DUNS) number • System of Award Management (SAM) Unique Entity ID (UEI) 	<ul style="list-style-type: none"> • Eligibility Criteria: <ul style="list-style-type: none"> ○ Confirmation of being headquartered in US ○ Authorized TMC Partner with SAP Concur
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6.2 Proposal Section 2: Service Offered

In the 'Services Offered' section of the online submission form, TMCs should respond to the questions that correspond to requirements and preferences listed in section 4.1 above.

6.3 Proposal Section 3: Pricing List

In the 'Pricing List' section of the online submission form, please submit the price schedule of the per-transaction fixed fee services for the following types of bookings:

- Online Booking in Concur
- Online Booking requiring Consultant Assistance
- Travel Consultant initiated book via phone or email

6.4 Proposal Section 4: Proposal Narrative

TMCs should upload the proposal narrative as an attachment to the online submission form

- Proposal Narrative
- Pricing List

TMCs must provide a detailed proposal narrative for its overall technical approach and plans to meet the requirements of the RFP. The narrative should demonstrate that the TMC understands the objectives that the contract intends to meet, and the nature of the work required necessary to successfully complete the contract while adhering to Federal Travel Regulations and CDC Foundation's Travel Policy.

The Proposal Narrative should not exceed 10 (ten) 8.5 by 11-inch pages using 11-point Arial or Calibri font, excluding attachments. Lesser font sizes may be used in tables and charts, so long as such fonts are clearly legible. CVs/resumes and references provided will not count towards the Proposal Narrative maximum but are limited to two (2) pages each. The narrative should be uploaded as a single Microsoft Word (.doc or .docx), Power Point (.ppt), or Adobe Acrobat (.pdf) file with the TMC's name clearly identified in the header or footer of each page. Note that the maximum file size that can be uploaded is 30MB.

The proposal should include the following:

Capacity
<ul style="list-style-type: none"> • Demonstrate your ability and plan to handle international airline reservations • Demonstrate company capabilities and financial statements for the prior three years of operation • Demonstrate the ability to reconcile centrally billed airfare against multiple credit cards used for various cost centers (projects) and the ability to separate personal from business travel arrangements • Describe approach to securing air travel and other travel services in attempt to achieve cost savings.
Staffing and Management

<ul style="list-style-type: none"> • Demonstrate the number of employees/staffs handling such travel service needs. • Demonstrate after hours and weekend coverage/emergency service capacity • Identification by name and title of key individuals, especially an account representative, who would direct and provide the services including a resume of each individual that describes their experience and responsibilities.
Systems & Reporting
<ul style="list-style-type: none"> • Describe the management information system. • Indicate if there is an online reporting tool that the CDC Foundation would have access to; provide a description and please be prepared to provide a demo. • Describe the available reports. • Describe your ability to track travelers at any given point in time. • Describe your ability to provide ad-hoc reporting.
References
<ul style="list-style-type: none"> • References from clients with similar needs including names and titles for contact purposes.

6.5 Submitting a Proposal

Proposal materials should be submitted by **5:00pm Eastern Time on Friday, February 17, 2023**

Proposals will not be accepted after this date and time.

Proposals must be submitted electronically at

<https://app.smartsheet.com/b/form/ac40b7fc50c3440cb094ad606933bd9f>

TMCs are encouraged to submit their proposal by 12:00pm Eastern Time on Friday, February 17, 2023, to allow sufficient time to address any unexpected technical issues.

The CDC Foundation is committed to providing accessibility for people with disabilities and is working towards making our materials more accessible. If this document presents accessibility challenges, please email with the subject line "Accessibility assistance." We will gladly work with you on providing the information in a different format.

7. SELECTION PROCESS AND REVIEW CRITERIA

7.1 Anticipated Timeline

The timeline below is subject to change at the sole discretion of the CDC Foundation:

February 1, 2023	RFP Release
February 6, 2023	Question Submission Deadline
February 8, 2023	RFP Supplement Release
February 17, 2023	Proposal Submission Deadline
Mid-March, 2023	Proposal Presentations

Late-March, 2023	Anticipated Selection Notification
July 1, 2023	Effective Date of Resulting Agreement

7.2 Communication During the RFP Period

All questions and requests for clarification regarding this RFP should be submitted by prospective TMCs in writing via email to travelrfp@cdcfoundation.org no later than **5:00pm Eastern Time on February 6, 2023**, with a subject line of: CDCF TCM RFP Questions. Responses to all questions and requests for clarification received by the stated deadline for inquiries will be consolidated into a single RFP supplement and shared via email by **5:00pm Eastern Time on February 8, 2023**. Inquiries received after the stated deadline will not be addressed.

7.3 Evaluation

Compliant proposals received from eligible TMCs by the stated proposal submission deadline will be evaluated in accordance with the review criteria outlined below. Selection will be made based on "best value" with technical/cost trade-off analysis performed such that both the technical merit and cost of proposals are considered. Price analysis will be performed based upon the Pricing List submitted. As previously stated in section 6 (Instructions for TMCs) of this solicitation, the CDC Foundation reserves the right to award a contract based on initial offers, without discussion. Therefore, proposals should contain an TMCs' best solution, from cost/price and technical standpoints. The CDC Foundation may, at its discretion, invite presentations, hold panel interviews, conduct discussions, request clarification and/or solicit a best and final offer from any or all TMCs as part of the evaluation process. Further, the CDC Foundation also reserves the right to conduct a pre-award risk assessment and may request additional financial and/or organizational information from TMCs for the purpose of conducting the assessment. Review findings may impact eligibility and/or award structure.

Evaluation criteria of the proposal are as follows.

Evaluation Criteria	Points
Services	35 Points
<ul style="list-style-type: none"> The extent to which the TMC is able to meet the service requirements and preferences outlined in Section 4.1 Services above. 	
Pricing List	0 Points
<ul style="list-style-type: none"> Prices listed will not be assigned quantitative scores. Price information will be factored into the overall award decision when determining best value. 	
Capacity	15 Points
<ul style="list-style-type: none"> The extent to which the TMC demonstrated their ability and plan to handle international airline reservations The extent to which the TMC demonstrated their capabilities and whether financial statements for the prior three years of operation were provided The extent to which the TMC demonstrated their ability to reconcile centrally billed airfare against multiple credit cards used for various cost centers (projects) and the ability to separate personal from business travel arrangements How well the TMC described their approach to securing air travel and other travel services in attempt to achieve cost savings. 	

Staffing and Management	15 Points
<ul style="list-style-type: none"> • The extent to which the TMC demonstrated an adequate number of employees/staffs handling such travel service needs. • To what extent the TMC provides after hours and weekend coverage/emergency service capacity • The extent to which key individuals were identified and the qualifications of each. 	
Systems and Reporting	25 Points
<ul style="list-style-type: none"> • The quality of the described management information system • Whether there is an online reporting tool that the CDC Foundation would have access to; the ability of the system to meet CDC Foundations needs based on the description (and demo if applicable) provided. • The quality of the available reports described. • The extent to which the TMC is able to track travelers at any given point in time. • The extent to which the TMC is able to provide ad-hoc reporting. 	
References	10 Points
<ul style="list-style-type: none"> • The extent to which the TMC provided references from clients with similar needs including names and titles for contact purposes. 	
Total Possible Points	100 Points

7.4 Notification to TMCs

All TMCs will receive notification of whether they are selected as the successful TMC. The CDC Foundation will not provide scores or specific review feedback to unsuccessful TMCs.

8. OTHER REQUIREMENTS

8.1 RFP Changes

The CDC Foundation reserves the right to negotiate any or all RFP terms and conditions, and to cancel, amend or resubmit this RFP in part or entirety at any time.

8.2 RFP Conditions

TMCs must provide disclosure of any known past, present or prospective relationships with any parties associated with the CDC Foundation. For example, TMC should disclose if a member of their Board is also a member of the CDC Foundation's Board currently or in the past. The TMC also certifies that the prices offered were arrived at independently and without purpose of restricting competition with other TMCs, including but not limited to subsidiaries, and that prices have not been and will not be knowingly disclosed to any other TMC unless required by law. Failure to comply with these requirements may result in the CDC Foundation having to re-evaluate the selection of a proposal.

This RFP is not an offer to contract but represents a definition of specific requirements and an invitation to qualified Travel Management Companies (TMC) to submit a response addressing our business requirements. Issuance of the RFP, your preparation and submission of a proposal, and subsequent receipt and evaluation of your proposal by the CDC Foundation does not commit the CDC Foundation to award a contract to you or any other respondent, even if all requirements stated in the RFP are met. All costs of participation including your proposal and subsequent activity in the selection phase are at your risk and any such costs, whether direct or indirect, are the responsibility of the TMC.

Nothing in this document shall be construed as an offer by the CDC Foundation and no terms, discussions or proposals shall be binding on either party prior to execution of a definitive agreement. The CDC Foundation reserves the right to reject any part or the entire proposal. The CDC Foundation's decision may be made on any basis it deems pertinent to this undertaking, regardless of whether or not a particular factor is described in this Request for Proposal or otherwise discussed between the parties.

Proposals are expected to be binding for a period of one hundred and twenty (120) days from the published response date.

8.3 Non-Disclosure and Confidentiality

TMCs shall hold in confidence and, without the prior written approval of the CDC Foundation, shall not disclose to any third party, except to employees and approved subcontractors having a need to know, and Proprietary information provided to the TMC by the CDC Foundation or any of its subsidiaries or affiliates. TMCs shall not use Proprietary information for any purpose other than responding to this RFP. The term "Proprietary Information" means (a) any information of the CDC Foundation which is not openly communicated or accessible to third parties, whether or not marked or identified as confidential, related technical data and know-how, financial information, pricing, terms of sale, products, processes, plans, personnel, research and development projects or other aspects of the business of the CDC Foundation until such information shall have ceased to be proprietary as evidenced by general public availability and knowledge, (b) information of a third party as to which the CDC Foundation has a non-disclosure obligation, and (c) information produced by TMC in the course of performing the services. All tangible proprietary information in TMC possession or control shall be promptly returned to the CDC Foundation or destroyed on request or upon termination of this RFP, whichever occurs first.