Travel Management Center
Support Services

REQUEST FOR PROPOSAL

RFP # PCO-TRAVEL2013

November 22, 2013

<table>
<thead>
<tr>
<th>KEY DATES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Proposal Released</td>
<td>November 22, 2013</td>
</tr>
<tr>
<td>Deadline for Questions</td>
<td>December 13, 2013 at 5 pm ET</td>
</tr>
<tr>
<td>Deadline for Proposals</td>
<td>January 10, 2014 at 5 pm ET</td>
</tr>
<tr>
<td>Projected Award Date</td>
<td>January 31, 2014</td>
</tr>
<tr>
<td>Project Start</td>
<td>February 05, 2014</td>
</tr>
</tbody>
</table>
About PCORI

PCORI was authorized by the Patient Protection and Affordable Care Act of 2010 as a nonprofit, nongovernmental organization and is charged with helping patients, clinicians, purchasers, and policy makers make better informed health decisions by “advancing the quality and relevance of evidence about how to prevent, diagnose, treat, monitor, and manage diseases, disorders, and other health conditions.” It does this by producing and promoting high-integrity, evidence-based information that comes from research guided by patients, caregivers, and the broader healthcare community.

PCORI’s strong patient-centered orientation directs attention to individual and system differences that may influence research strategies and outcomes. PCORI is charged with producing useful, relevant clinical evidence through the support of new research and the analysis and synthesis of existing research.

PCORI is committed to transparency and a rigorous stakeholder-driven process that emphasizes patient engagement. PCORI uses a variety of forums and public comment periods to obtain public input to enhance its work.
Opportunity Snapshot

PCORI requires a travel management center support services (TMC) contract that will establish its travel management processes and meet its functional, technical, and security requirements. The TMC at minimum will:

- Provide a web-based, self-service, end-to-end travel solution
- Meet PCORI’s travel service needs, which include: travel planning, cost estimation, travel authorization creation, booking of travel reservations, travel fulfillment, and filing/processing/approval of official travel claims for domestic and international travel
- Supply travel reporting and data exchange for PCORI
- Reduce or eliminate the need for hardcopy travel documentation.

PCORI is seeking a travel service provider that offers customized services and is experienced in providing travel services to nongovernmental organizations.

The period of performance is a base year and three option years. Anticipated contract award date is approximately 21 days from the due date of the proposal response.

PCORI intends to award a Cost Reimbursable (CR) contract.

The TMC will allow PCORI to realize significant cost savings, improve employee productivity, and provide a simplified official travel approach to processing.
How to Proceed

1. **Review the Requirements**
   Examine all sections of the RFP and learn about [what makes PCORI’s research different](https://pcori.org/research-we-support/pcori).  ¹

2. **Consider the Evaluation Criteria**
   Consider the organization eligibility requirements and PCORI’s specific requirements to see whether your organization, your interests, and your capabilities fit this program. Check the PCORI website for any modifications or amendments up to the submission deadline.

3. **Develop Your Proposal**
   Develop your response to accomplish the Scope of Work.

4. **Follow Submission Guidelines**
   See the Submission Guidelines section of this document.

5. **Submit Your Proposal**
   Proposals are due by 5 PM (EDT) on January 10, 2014.

¹ Available at pcori.org/research-we-support/pcori.
Contents

About PCORI
Opportunity Snapshot
How to Proceed
Definitions and Acronyms
Project Requirements
Scope of Work
Requirements for Providing Official Travel Services
Key Deliverables
Period of Performance
Other Requirements
Proposal Evaluation Criteria
Submission Guidelines
Volume 1: Technical Proposal
Volume II: Cost Proposal
Submission Deadline, Questions, and Anticipated Award Date
Post-Submission Information
Withdrawal or Modification of Proposals
Late Submissions
Best and Final Offers
Retention of Proposals
Protests

PCORI RFP # PCO-TRAVEL2013
Post-Award Information .................................................................................................................... 19
Anticipated Award Date ......................................................................................................................... 19
Post-Award Conference/Kickoff Meeting ............................................................................................... 19
Notice to Proceed ..................................................................................................................................... 19
Documentation Requirements .................................................................................................................. 20
Basis of Compensation to the Contractor ................................................................................................. 20
Billing and Payment Procedures ............................................................................................................... 21
Refund Procedures ................................................................................................................................... 21
Appendix A: Past Performance Chart ..................................................................................................... 22
Appendix B: Submission Checklist ........................................................................................................... 23
Appendix C: Performance Monitoring ..................................................................................................... 24
## Definitions and Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBA</td>
<td>Centrally Billed Account. Account established by a contract at the request of PCORI as defined in this document. Consolidated airline ticket charges accrued through use of centrally billed accounts will be billed at the conclusion of the contract. Expenses billed against centrally billed accounts are paid to PCORI travel charge card program Contractor.</td>
</tr>
<tr>
<td>CRS</td>
<td>Central Reservation System. A major airline computer reservations system, such as Apollo, Sabre, or Worldspan.</td>
</tr>
<tr>
<td>OAG – Official Airline Guide</td>
<td>Official Airline Guide (both Flight and Travel Guides). The OAG is available on the internet at <a href="http://www.oagaviation.com/Solutions/Reports-Guides">http://www.oagaviation.com/Solutions/Reports-Guides</a>. Official Travel is travel that is paid for and/or for which the traveler is reimbursed by the PCORI.</td>
</tr>
<tr>
<td>QASP</td>
<td>Quality Assurance Surveillance Plan, intended to ensure the qualitative success of the performance of the contract with measurements and monitoring by PCORI.</td>
</tr>
<tr>
<td>Section 508</td>
<td>Section 508 requires that federal agencies’ electronic and information technology is accessible to people with disabilities. <a href="http://www.section508.gov">www.section508.gov</a>.</td>
</tr>
<tr>
<td><strong>Transaction Fee</strong></td>
<td>Fee, charged by the Contractor, for issuance of a ticket for common carrier transportation, or changes to that ticket after issuance.</td>
</tr>
</tbody>
</table>
Project Requirements

Scope of Work

1. The Contractor will provide travel services for official domestic and, potentially, international travel of PCORI Board members, Methodology Committee members, staff, and invited guests. Domestic travel includes travel within the United States. The corporate travel services that the Contractor will provide include:

   • Online (web) self-service travel reservations; issuance and delivery of tickets for air, rail, bus, and seafaring carriers; and, where possible, advance seat assignments and advance boarding passes

   • Reservations for lodging accommodations outside of the PCORI-NCC events

   • Commercial automobile rental services

   • Detailed travelers’ itineraries

   • Assistance in obtaining passports, visas, and advice for health requirements when traveling abroad

   • Management information and billing reports derived from the booking database

   • Automated reconciliation of travel charges incurred through PCORI’s financial management system

   • Information pamphlets for travelers who use the contract

2. The Contractor will also provide travel services for any individual sponsored by PCORI under this contract.

3. Upon the request of employees or other persons with disabilities traveling on official business, the Contractor must arrange necessary and reasonable accommodations, including but not limited to airline seating, in-terminal transfers, ground transportation, and barrier-free or otherwise accessible lodging.

4. The Contractor is to comply with PCORI’s travel forms and any changes in procedures. The Contractor will remain informed of any such changes and updates, as necessary, by the PCORI Finance Department (FD).

Requirements for Providing Official Travel Services

1. Taxes. When reservations are made for official business, the Contractor will ensure that the rate is applied appropriately for a nonprofit tax-exempt section 501(c)1 corporation.
2. Transportation

- The Contractor will comply with best practices for air travel. The Contractor will book the most cost-effective travel package available that complies with PCORI’s Travel Policy. In the absence of prior approval by PCORI, if the reservations made by the Contractor are not at the most cost-effective rate allowed by policy, the Contractor will refund PCORI the difference.

- The Fly America Act generally precludes use of non-U.S. flag carriers and, as much as reasonably possible, the Contractor will comply with this guideline.

- The Contractor will provide PCORI with the reservation and ticketing services that industry practice normally accords corporate or private travelers, to include new and improved reservation and ticketing technologies. These will include a 24-hour number available to travelers to perform emergency itinerary changes and emergency services outside regular business hours. The Contractor will be responsible for ensuring that any subcontractor providing such emergency service complies with all conditions of the contract.

- Contractor will provide PCORI with a means to be able to procure airline tickets and make reservations on airlines that accept online credit card payments.

- The Contractor will issue premium class tickets, for which PCORI will have to pay an additional amount, only when the accompanying travel orders or other official documentation provide authority for that travel. This does not apply to situations in which frequent flyer benefits will be used to obtain the premium class tickets.

- Back-to-back faring, and hidden city ticketing, are prohibited under this contract.

- The Contractor will provide the traveler with last seat availability, advance seat assignment, and advance boarding passes on all airlines for which the Contractor can offer these services.

- The Contractor will make adjustments for any change(s) in flight, train, bus, or any seafaring vessel schedules. Tickets and billings will be modified or reissued to reflect these changes.

- The Contractor will make a timely effort to notify travelers of airport closings and canceled or delayed flights, trains, or buses.

- The Contractor will provide assistance in arranging transportation, and provide written or electronic confirmation when possible and feasible.

3. Lodging

- The Contractor/Subcontractor will provide lodging reservation services as needed for travel outside of the PCORI-hosted events and meetings. These services will include
initiating and confirming reservations and confirming the rate at which the reservation is made.

- Whenever possible, PCORI will adhere to the General Services Administration (GSA) per diem rates for lodging. Where available and warranted, the Contractor/Subcontractor will recommend lodging that falls within the GSA rates for the geographic area in which PCORI travelers are staying.

- Established Agreements. Where the Contractor or PCORI has agreements with hotels/motels for discount rates, the Contractor will endeavor to obtain such rates for PCORI travelers. (Frequently these rates are capacity-controlled.) If necessary to obtain discounted rates, the Contractor will call such hotels directly to inquire about providing group or other discounts. The Contractor will also make available to PCORI any lower-priced, guaranteed corporate, or other discount rates it has negotiated at these or other hotels.

- Final selection of accommodations rests with the traveler. If reservations made by the Contractor are not made at the most cost-effective package rate, the Contractor will refund PCORI the difference. Because final selection of accommodations rests with the traveler, the reservations made by the Contractor will be made at the most cost-effective rate that complies with the traveler’s request, or the Contractor will refund PCORI the difference. Lodging reservations for PCORI employees on official business will comply with the Hotel and Motel Fire Safety Act of 1990 (see Definitions), unless an exception is granted by the FD. As stated in the definition in paragraph 2.0, the Hotel and Motel Fire Safety Act of 1990 applies only to the United States and its territories.

4. Rental Vehicles

- The Contractor will reserve commercial vehicles for PCORI travelers, if requested. Where available, the Contractor who has negotiated discount rates with rental vehicle companies will be the first source for PCORI travelers. The Contractor will reserve vehicles from rental companies that have daily or extended rates; if no vehicles are available at discounted rates, the Contractor will provide vehicles from other firms at the most cost-effective rates available to the traveler, which will include full loss/collision damage waiver (LOW/COW), to the traveler.

- It is incumbent upon the traveler to be prudent in selecting the method of ground transportation that best meets the traveler’s needs. Therefore, since the final selection of car rental companies and car sizes rests with the traveler, the reservations made by the Contractor must be made at the most cost-effective rate that conforms to the traveler’s request, or the Contractor must refund PCORI the difference.
5. Foreign Travel

- Health Requirements. The Contractor will provide travelers with advice on necessary health requirements, including types of inoculations and vaccinations, whether required or suggested for foreign travel.

- Local Conditions. The Contractor will provide information and advice on conditions at the various destinations, including climatic conditions; type of clothing that is appropriate or essential; and location of American embassies and consulates, restaurants, and other services and events.

- Foreign Currency Information. The Contractor will provide technical advice on such matters as foreign currency exchange rate and transactions and securing auto insurance in conjunction with foreign automobile rentals.

- Visas. The Contractor will assist travelers in obtaining visas for foreign travel. The Contractor is required to provide delivery of visas to PCORI offices on an as-needed basis, at no cost to PCORI.

6. Leisure Travel

- The Contractor will also, if requested, provide on an open-market basis complete personal travel services and support for PCORI employees and their dependents requesting personal travel arrangements. However, no individual is required to use the services under this contract for personal travel. The transaction fees listed in the Pricing portion of this contract apply to all travel. However, the Contractor is responsible to broadcast in a clear, visible public place the transaction fees to be charged for personal travel.

7. Lost Luggage

- The Contractor will provide travelers with the option of procuring travel insurance for official travel that also protects the traveler against lost luggage. The Contractor is the main point of contact when the need to track lost luggage claims arises. Once the vendor verifies that the lost luggage has arrived, the Contractor must relay this information to the PCORI traveler, who will arrange for delivery and pickup.

8. Information Pamphlets.

- The Contractor will develop, print, and deliver electronically to PCORI a set of pamphlets listing procedures for traveler use of the services under this contract. These should be approximately pocket- or letter-size (if paper is used or requested), about two pages long and should provide Contractor phone numbers and other relevant information. If using electronic documents, the Contractor will ensure that the documents are searchable, downloadable, and accessible online.
• The Contractor will provide an electronic version of information pamphlets that can be used for orientation of new employees and new PCORI travelers.

• The Contractor will have a web portal technology solution that PCORI can use to make travel arrangements or send messages. This website is to be updated and maintained by the Contractor’s IT personnel, and will provide PCORI customers with information that includes, but is not limited to: updates on baggage fees, contact information for airlines locally and internationally, contact information at airports worldwide, all required forms and paperwork, contact information for travel agents, and services offered (in the area in which PCORI is traveling).

• The Contractor will provide information brochures that describe the services offered electronically, in order to reduce the time and resources that would normally be consumed in a “paper” environment. This must be updated as changes occur to provide accurate and real-time information to the customer.

• Newsletters. The Contractor will make it possible for PCORI travelers to “opt in” for electronic newsletters with special fares or tour offers on the web portal.

9. Travelers’ Itineraries

The Contractor will provide to each traveler a complete printed or electronic itinerary document including, but not limited to:

• Carrier(s)

• Flight, train, bus, or seafaring vessel number(s)

• If applicable, an annotation that the traveler declined the most cost-effective package offered

• Departure and arrival time(s) for each segment of the trip

• Name, phone number, location, cancellation requirements, and, where applicable, tax-exempt information

• Vehicle rental company, to include name and (toll-free, if applicable) telephone number of supplier, pickup and return dates, location of pickup, confirmed rate and confirmation number, and, where applicable, special pickup instructions and hours of operation, notably for off-airport suppliers

• A statement and a copy of the passenger receipt coupon of all charges associated with the transportation ticket, including the ticket number, price, fees charged, and a description of those fees

• An indication of type of ticket, electronic or paper
10. Emergency Contact

The Contractor will provide access to a live person for emergency/after-hours calls.

11. Ticket Delivery

- Travelers will be provided with an itinerary and confirmation number in advance of travel. Prepaid tickets will not be used as a routine method of providing tickets.

12. Technology Services, Communications System, and Emergency Services

- Technology Services
  - Online Booking. PCORI travelers need access to an online booking portal that allows them to perform self-service. When travelers are engaging in online services, the Contractor will populate the most favorable package with the most cost-effective scenario first. In the event that the booking is made with a higher-priced package, then the traveler will be required to acknowledge an “override” if selecting the higher-rated package.
  - Barcodes. The Contractor will offer barcode applications for travelers who prefer mobile access for facilitating travel arrangements.
  - Integration. The Contractor must be able to have the ability to integrate the technology solution with PCORI’s use of Intact and Concur, as well as corporate credit cards.
  - Security. Because PCORI will be using online booking and, by default, will be creating individual login sessions, the Contractor will describe its Security Plan, including a back-up strategy, to ensure that continuous operations are in place, and to ensure that both the traveler’s personal information and PCORI’s corporate information is protected from cyber-attacks, hackers, phishing, and similar intrusions. The Contractor will also provide a Type 2 Statement on Standards for Attestation Engagements (SSAE) No. 16 report, or another form of management assurance on the integrity of the service organization’s system and the suitability of the design and operating effectiveness of controls.

- Communication System
  - Media Formats. In addition to the required reports, the Contractor will produce, within reasonable parameters, ad hoc management reports in formats and media requested from time to time by the FD. To compile such reports, the Contractor’s back-office technology framework and architecture will be capable of collecting all data from reservation and ticketing records in the formats requested. The Contractor will also have the ability to capture data for reports when the central reservation system (CRS) is not operating and for airlines that do not subscribe to a CRS.
• Emergency Communication Services
  o The Contractor will provide dedicated telephone service for the account(s) as part of the technical and pricing solution, to include a local 24-hour toll-free number available to travelers that will allow immediate access to a reservation agent to perform emergency itinerary changes outside regular business hours.
  o The Contractor will be responsible for ensuring that any subcontractor providing 24-hour emergency service complies with all conditions of the contract.
  o In the event of emergencies (e.g., Presidential-declared disasters, forest fires, evacuations, floods, hurricanes), the Contractor will maintain operations necessary to support PCORI under this contract. This includes facilitating alternative methods of transportation and relocation of personnel for lodging, travel reservations, changes, and Confirmations.
  o The Contractor will continue to provide services during emergencies or contingencies.

13. Project Management

The Contractor will provide reservation agents, personnel, and equipment necessary to assure that the highest quality of service is provided. The Contractor will have the ability to make reservations and provide tickets at its servicing office. All Contractor personnel providing services under this contract will be fluent in English and meet the following requirements:

• Key Personnel

  The Contractor will provide a Project Manager who will be responsible as the POC for PCORI. The Project Manager will have experience in the management of travel services, and will have adequate authority to make decisions for the timely resolution of problems. The Project Manager will coordinate closely with the FD.

• Other Staff

  The Contractor will propose how it will staff the TMC to support PCORI’s travel needs to include all travel services described in this scope of work. The Contractor will demonstrate its ability to support the variety of requests from PCORI travelers and present its problem resolution method.
**Key Deliverables**

The Contractor will provide the following deliverables/submittals within the timeframes identified below:

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Due Date (calendar days unless otherwise described)</th>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tickets / Package</td>
<td>As order online or via phone</td>
<td>E-mail to traveler</td>
</tr>
<tr>
<td></td>
<td>Phone method: sent via e-mail to address on record</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Portal: sent via e-mail upon submission to address on record</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Paper copies: only as last resort</td>
<td></td>
</tr>
<tr>
<td>Quarterly Problem and Resolution Report</td>
<td>10th day after the last day of each calendar quarter</td>
<td>Send to Finance Department</td>
</tr>
<tr>
<td>Quarterly Travel Activity Report</td>
<td>10th day after the last day of each calendar quarter</td>
<td>Send to Finance Department</td>
</tr>
<tr>
<td>Billing Reconciliation Report</td>
<td>5th work day after the receipt of card’s billing</td>
<td>Send to Finance Department</td>
</tr>
<tr>
<td>Fee Report</td>
<td>25th day of each month</td>
<td>Send to Finance Department</td>
</tr>
<tr>
<td>Override Report</td>
<td>25th day of each month</td>
<td>Send to Finance Department</td>
</tr>
<tr>
<td>Information Pamphlets</td>
<td>Within 14 days of contract award</td>
<td>Send to Finance Department</td>
</tr>
<tr>
<td>Quality Surveys</td>
<td>Within 6 months after contract award</td>
<td>Send to Finance Department</td>
</tr>
<tr>
<td>Ad Hoc</td>
<td>PCORI may request special reports to be developed over the course of the contract with the data collected through the various channels (online, messaging, or phone)</td>
<td>Send to Finance Department</td>
</tr>
</tbody>
</table>
Management Reports and Deliverables

The Contractor will provide PCORI with management information reports. At a minimum, the Contractor will develop the following reports due monthly and/or quarterly:

- Quarterly Problem and Resolutions Report—A concise quarterly narrative (no more than one page) of the Contractor’s activities. This report will identify problems and recommend solutions. The report will include suggestions to enhance service, where appropriate. PCORI encourages interim reports as deemed necessary by the Contractor.

- Quarterly Travel Activity Report—A quarterly summary of travel activity data. The Contractor will prepare the report in accordance with the sample (provided upon contract award). This summary will reflect all official travel activity for each traveler using the contract, whether the travel was purchased using a corporate credit card or a centralized billing account.

- Reconciliation of Billing Report—The Contractor will provide computerized reconciliation of transportation billings charged through CBA accounts. The Contractor will use an automated accounting system with direct interface among the reservation, ticketing, and accounting elements, so that all passenger reports and summary data are automatically generated from point-of-sale information. Travelers participating in PCORI’s charge card program have CBA accounts established with the charge card company. The charge card company will provide the Contractor with information, in electronic format, of a month’s CBA billings by department. In order to perform computerized reconciliation of accounts, the Contractor must have sufficient computer capacity and the ability to read and process the information. The Contractor will run these data against its own record of transactions to provide each department with reconciled charges, no later than five (5) working days from receipt of the charge card vendor’s billing information.

- Fee Report—A report based on the transaction or other fee(s). This report will list all fees to be paid. The fees will be broken down by type of transaction, following the line items in the pricing portion of this contract. For example, if a courier is used, the transaction fee associated with courier delivery will be listed separately from the standard transaction fee.

The Contractor must consider electronic methods of communication of report information, in order to minimize or eliminate unnecessary paperwork.

Period of Performance

The period of performance is a short base year with three (3) option years. Anticipated contract award date is approximately 21 days from due date of proposal response.
Base Period   February 05, 2014 to February 05, 2015
Option 1   February 06, 2015 to February 06, 2016
Option 2   February 07, 2016 to February 07, 2017
Option 3   February 08, 2017 to February 08, 2018

Other Requirements

Place of Performance
The Contractor is required to provide one Travel Management Center to be used to provide the services required hereunder. This center will be staffed by the Contractor’s personnel and located at its offices.

Hours of Service
The Contractor will maintain normal hours of operation Monday through Friday, between 8:30 am and 6:30 pm in its respective time zone. A 24-hour toll-free number will be provided for emergencies. PCORI has regular observance of federal holidays: New Year’s Day, Birthday of Martin Luther King, Jr., President’s Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and Christmas Day.

Type of Contract
Cost Reimbursable

Non-Disclosure Agreement
The Contractor will not release any sensitive, confidential, or proprietary information without prior written approval from PCORI. At the time of award, the Contractor will be required to sign a Non-Disclosure Agreement (NDA)

Organizational Conflict of Interest
The Contractor, upon award, will sign a statement confirming that it does not have, and will prevent, any organizational conflict of interest. If a conflict arises, the Contractor will immediately advise PCORI.

Proposal Evaluation Criteria
Award will be made to the Contractor who proposes a best value offer, as determined by following the procedures outlined in the previous sections.
PCORI reserves the right to reject proposals that are unreasonably low or high in price. Price will be evaluated for cost realism.

The price will be determined with regard to the fulfillment of the travel requirements based on the Scope of Work outlined in the Performance Work Statement.

PCORI will determine Contractor’s acceptability by assessing the Contractor’s compliance with the terms of the RFP.

<table>
<thead>
<tr>
<th>Transaction Description</th>
<th>Weight of Rating Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Proposal</td>
<td>40%</td>
</tr>
<tr>
<td>Management Approach</td>
<td>10%</td>
</tr>
<tr>
<td>Past Performance</td>
<td>40%</td>
</tr>
<tr>
<td>Cost Proposal</td>
<td>10%</td>
</tr>
</tbody>
</table>

**Evaluation Categories**

**Outstanding**—The Contractor has demonstrated that there is a high probability of success in a combination of past results, low risk, and professional distribution of services.

**Good**—The Contractor has demonstrated that there is a good probability of success in a combination of past results, moderate risk, and professional distribution of services.

**Fair**—The Contractor has demonstrated that there is marginal probability of success in a combination of past results, high risk, and professional distribution of services.

**Poor**—The Contractor has not demonstrated that there is an adequate probability of success in this services-based effort.

**Submission Guidelines**

Submissions should be organized into two separate volumes, sent as separate files. All text should be Arial or Times New Roman font, no less than 11 point with one-inch margins and single spaced. Graphics and tables may be included. We accept MS Word, MS Excel, or Adobe PDF formats. To ensure completeness, please refer to the Submission Checklist (Appendix B).
Each submission must include a cover letter with the following information:

- Contractor’s name and mailing address
- Reference to the solicitation (RFP) number (RFP # PCO-TRAVEL2013)
- Technical and contract points of contact (name, phone number, and e-mail address)
- Business size (large, small, state/federal certifications—MBE, 8(a), HUBZone, etc.)
- Dunn & Bradstreet Number (DUNS)
- Federal Tax ID (EIN, TIN, SS)
- Affirmation that the quote is valid for at least 30 days
- A statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation and agreement to furnish any or all items upon which prices are offered at the price set opposite each item
- Acknowledgement of any amendments by reference
- The Contractor will prepare two Volumes, to include Volume I for the Technical Solution, Management Approach, and Past Performance; and Volume II to include the Cost Proposal. These should be sent separately via the acceptable formats described above.

Questions must be submitted to rfp@pcori.org, referencing RFP # PCO-TRAVEL2013 in the subject line, no later than 5:00 pm (ET) on December 13, 2013.

**Volume I: Technical Proposal**

Describe a plan to provide, prioritize, and manage the tasks included in the Scope of Work. Describe the knowledge, experience, and capabilities related to provision of the range of support needs described. Such expertise may be provided either by Contractor employees or through subcontracts for professional services.

1. **Statement of Understanding**
   The Contractor will state a clear understanding of the mission of PCORI and this project.

2. **Technical Solution**
   The Contractor will demonstrate and describe its proposed solution, based on the requirements in the Performance Work Statement. The submission shall be no longer than 15 pages.
3. **Management Approach**

The Contractor will demonstrate that it has the ability to manage and control the operation required per the scope of work to ensure successful program support, including subjects such as program management. This section should be no more than 10 pages.

4. **Past Performance**

The Contractor will identify up to three previous or existing clients within the last five years in the nonprofit, commercial, or federal market for which they performed a project with tasks similar to those stated in the Scope of Work.

- Include client name, period (dates) of performance, POC name/e-mail/phone number, and summary of work performed.
- Complete the table in Appendix A for each selected project.

**Volume II: Cost Proposal**

The Contractor will provide a pricing proposal that supports the estimated travel shown in the table below for PCORI-hosted meetings and events.

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Travel</th>
<th>Quantity</th>
<th>Pricing</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001 – Base Period Date of Award to ___________</td>
<td>PFA In-Person Reviews Meetings/Year</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Days/Meeting 1.5</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Headcount 1,000</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Board of Governors Meetings Meetings/Year</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Days/Meeting 1.5</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Headcount 225</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Board of Governors Retreat Meetings/Year</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Days/Meeting 1.5</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Headcount 26</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Methodology Committee Meetings/Year</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Days/Meeting 1</td>
<td></td>
</tr>
<tr>
<td>Option Year</td>
<td>Date Range</td>
<td>Meetings/Year</td>
<td>Days/Meeting</td>
</tr>
<tr>
<td>-------------</td>
<td>------------</td>
<td>---------------</td>
<td>--------------</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td>3</td>
<td>1.5</td>
</tr>
<tr>
<td>PFA In-Person Reviews</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board of Governors Meetings</td>
<td></td>
<td>6</td>
<td>1.5</td>
</tr>
<tr>
<td>Methodology Committee</td>
<td></td>
<td>12</td>
<td>1.5</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>3</td>
<td>1.5</td>
</tr>
<tr>
<td>PFA In-Person Reviews</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board of Governors Meetings</td>
<td></td>
<td>6</td>
<td>1.5</td>
</tr>
<tr>
<td>Methodology Committee</td>
<td></td>
<td>12</td>
<td>1.5</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>3</td>
<td>1.5</td>
</tr>
<tr>
<td>PFA In-Person Reviews</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board of Governors Meetings</td>
<td></td>
<td>6</td>
<td>1.5</td>
</tr>
<tr>
<td>Methodology Committee</td>
<td></td>
<td>12</td>
<td>1.5</td>
</tr>
</tbody>
</table>
### Board of Governors Meetings
- Meetings/Year: 6
- Days/Meeting: 1.5
- Headcount: 36

### Methodology Committee
- Meetings/Year: 12
- Days/Meeting: 1.5
- Headcount: 22

**Note 1:** These are projected travel numbers. Other unknown dates may be considered or, conversely, travel may be canceled or postponed.

**Note 2:** Locations TBD for most meetings. Not all travelers are located in the Washington, DC, Metro area.

**Note 3:** The Contractor must demonstrate its ability to provide Travel Management Services for the events described in the Scope of Work. (For example: The Contractor should describe sets of cost line-item numbers for Base Year and Option Years; see above).

**Submission Deadline, Questions and Anticipated Award Date**

All proposals should be sent no later than 5 pm (ET) on January 10, 2014, to rfp@pcori.org with RFP # PCO-TRAVEL2013 in the subject line.

Questions are to be submitted to rfp@pcori.org, with reference to the solicitation number in the subject line due by 5:00 PM on 12/13/2013.

E-mail responses to rfp@pcori.org with reference to the solicitation number in the subject line.

Anticipated award date for contract: 01/31/2014.
Post-Submission Information

Withdrawal or Modification of Proposals
A Contractor may modify or withdraw its proposal upon written, electronic, or facsimile notice if received at the location designated in the solicitation for submission of proposals not later than the closing date and time for receipt of proposals.

Late Submissions
Late proposals, requests for modification, or requests for withdrawal will not be considered, unless a late modification of a successful proposal makes terms more favorable for PCORI.

Best and Final Offers
Subsequent to receiving the original proposals, PCORI reserves the right to notify all technically acceptable Contractors within the competitive range and to provide them an opportunity to submit written best and final offers (BAFOs) at the designated date and time.

BAFOs will be subject to the late submissions, late modifications, and late withdrawals of proposals provision of this RFP. After receipt of a BAFO, no discussions will be reopened unless PCORI determines that it is clearly in PCORI’s best interest to do so (e.g., it is clear that information available at that time is inadequate to reasonably justify Contractor selection and award based on the BAFOs received). If discussions are reopened, PCORI will issue an additional request for BAFOs to all technically acceptable Contractors still within the competitive range.

At its discretion, PCORI also reserves the right to invite Contractors who are technically acceptable to make a presentation to PCORI on the proposed effort for technical and management approaches identified in the submission. PCORI will notify vendors who meet the qualifications and provide the date, time, and format for the presentation.

Retention of Proposals
All proposal documents will be the property of PCORI, retained by PCORI, and not returned to the Contractors.
**Protests**

Any actual or prospective Contractor who is aggrieved in connection with the solicitation or award of a contract must file a protest with PCORI no later than 10 business days after the basis of protest is known or should have been known, whichever is earlier. A protest based on alleged improprieties in a solicitation that are apparent before proposal opening or the time set for receipt of initial proposals will be filed with PCORI before proposal opening or the time set for receipt of initial proposals. For procurements in which proposals are requested, any and all alleged misconducts not stated in the initial solicitation, but which were subsequently incorporated into the solicitation, must be protested no later than the closing time for receipt of proposals. The protest will be filed in writing. Protests should be submitted to finance@pcori.org or mailed to:

PCORI  
Attn: Finance Department  
1828 L Street NW, Suite 900  
Washington, DC 20036

**Post-Award Information**

**Anticipated Award Date**

The anticipated notice of award date is January 10, 2014.

**Post-Award Conference/Kickoff Meeting**

Upon notice of award, PCORI will coordinate an award kickoff meeting within 10 days with the Contractor. Date, time, and location will be provided at the time of the award.

**Notice to Proceed**

Immediately upon receipt of notice of award, the Contractor will take all necessary steps to prepare for performance of the services required hereunder, including contract execution. The Contractor will have a maximum of 30 calendar days to complete these steps.

Following receipt from the Contractor of acceptable evidence that the Contractor has obtained all required licenses, permits, and insurance and is otherwise prepared to commence providing the services, PCORI will issue a Notice to Proceed.

On the date established in the Notice to Proceed (this notice will allow a minimum of seven [7] calendar days from the date of the Notice to Proceed, unless the Contractor agrees to an earlier date), the Contractor will start work.
**Documentation Requirements**

Certifications, Permits, Licenses. The Contractor may be required to provide documentation to support its legal ability to operate facilities in the United States.

Insurance. The Contractor hereby assumes absolute responsibility and liability for any and all personal injuries or death and/or property damage or losses suffered as a result of negligence of the Contractor’s personnel in the performance of the services required under this contract. The Contractor, at its own expense, agrees to provide and maintain the requisite insurance in support of this contract for the entire duration, including option years, with the following minimum coverage:

| General Liability | $1,000,000 |

**Basis of Compensation to the Contractor**

Travel services are event-driven. The Contractor will be compensated only when the travel services are initiated and used by PCORI travelers for official business.

Official Travel. PCORI will reimburse the Contractor for transportation services for official travel arranged by the Contractor. This reimbursement will include only the actual carrier rates and/or fares effective for air, rail, bus, or seafaring vessel tickets issued to PCORI travelers for official travel. PCORI will also pay the Contractor, upon receipt of a proper invoice, the applicable fees that have been contracted.

This applies to official PCORI travel and is not intended for personal travel use. Upon issuance of the transportation ticket, the Contractor will charge PCORI the applicable fee(s) for one transaction, that transaction being the ticket issuance. The Contractor will not charge additional fees for any other services, such as car rental, lodging, or other arrangements made at the initial request.

The Contractor may charge another transaction fee to PCORI for any changes made to the reservation after the initial request.

In the event of Contractor error in the processing of a reservation, the Contractor may not charge additional transaction fees.

Advance Deposits. When advance deposits or fees are required by hotels for official travel, PCORI will pay the Contractor for such fees incurred.

Transactions initiated by the PCORI traveler for personal reasons will be between the Contractor and the traveler. PCORI will not pay for personal travel under any circumstance.
Billing and Payment Procedures

Using Corporate Credit Cards

- Billing and payment procedures for transportation expenses may vary, depending on the corporate credit card being used. Only the cost of approved travel, including transportation, lodging, and car rental, may be charged to PCORI, plus the contracted fee(s), reduced by any commission.

- The Contractor will refund promptly the difference in cost if the Contractor has failed to book the most cost-effective travel package, except for the constraints noted in the Performance Work Statement. No fee(s) will be charged for this refund, but neither will the fee(s) paid by PCORI be refunded by the Contractor.

- The traveler must make payment for all other services, such as hotels or rental cars. The traveler will make such payment, as appropriate, to the supplier or to the Contractor. The Contractor will accept the PCORI corporate credit card (as described below) and may allow any other mutually accepted arrangement.

Refund Procedures

Refunds will be made directly to the PCORI American Express corporate account. Travelers should not be recipients of refunds.

The Contractor will treat refunds on purchases by CBA in the same manner as refunds for similar charge or credit card purchases. Refunds for unused, downgraded, or exchanged tickets will be made by the Contractor immediately in the form of a credit refund receipt returned to the agency, with the credit applied to the agency’s CBA. No cash refunds will be made for CBA purchases.
Appendix A: Past Performance Chart

The Contractor will submit the following information as part of the proposal for both the Contractor and proposed major subcontractors: a list of three contracts completed during the past five years, or currently in process. Contracts listed may include those entered into by the federal government, agencies of state and local governments, and commercial clients. Include the following information for each contract and subcontract:

<table>
<thead>
<tr>
<th></th>
<th>Contract 1</th>
<th>Contract 2</th>
<th>Contract 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of contract</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name of client or customer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dates of performance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total contract value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program manager and telephone number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contracting officer and telephone number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative contracting officer, if different from contracting officer, and telephone number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>List of major subcontracts</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Appendix B: Submission Checklist

<table>
<thead>
<tr>
<th>Section</th>
<th>Length</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cover Letter</strong></td>
<td>As needed</td>
</tr>
<tr>
<td><strong>Volume I: Technical Proposal</strong></td>
<td></td>
</tr>
<tr>
<td>□ Statement of Understanding</td>
<td></td>
</tr>
<tr>
<td>□ Technical Solution</td>
<td>25 pages maximum</td>
</tr>
<tr>
<td>□ Management Approach</td>
<td></td>
</tr>
<tr>
<td>□ Past Performance</td>
<td></td>
</tr>
<tr>
<td>□ Appendix A: Resumes of Key Personnel</td>
<td>2 pages per résumé maximum</td>
</tr>
<tr>
<td>□ Appendix B: Past Performance Table</td>
<td>As needed</td>
</tr>
<tr>
<td><strong>Volume II: Cost Proposal</strong></td>
<td></td>
</tr>
<tr>
<td>□ Budget</td>
<td>As needed</td>
</tr>
<tr>
<td>□ Budget Narrative (Optional)</td>
<td>2 pages maximum</td>
</tr>
</tbody>
</table>
Appendix C: Performance Monitoring

It is PCORI's intent to develop Service Level Agreements (SLAs) for this effort. The SLAs will be developed post-award and as mutually agreed between the Contractor and PCORI. The SLAs, once established, may be subject to change as the TCM program progresses and matures.

**Contractor’s Quality Control and Quality Assurance Surveillance Plan**

The Contractor will describe its procedures to continually monitor the quality of travel services with the goal of providing and maintaining the highest level of customer service and satisfaction. These procedures should include:

- An internal method for monitoring, identifying, and correcting deficiencies in the quality of service furnished to PCORI.
- A Quality Service survey form that addresses travel services to be furnished under this contract.

The Contractor should describe and outline its procedures to ensure that the most cost-effective travel package is obtained and that adjustments in flights, hotel, or rental vehicles are professionally facilitated and any reissue of information is expedited.

The Contractor's automated system will assure reservation accuracy and the most cost-effective travel package, including rebooking passengers at the best available fares, or reserving preferred seats if such fares or seats are not available at the first attempted booking. Additionally, the Contractor will identify methods to check all tickets/itineraries for required data and lowest fares, to include those that cannot be checked through the automated system(s).

The Contractor should describe the method(s) of measurement that are used to ensure it complies with the standards of the service.

1. Within fourteen (14) business days of contract award, the Contractor will furnish a Quality Service survey (questionnaire) to the FD for approval. The Quality Service survey will include, at a minimum:
   - Courtesy and professionalism of Contractor personnel
   - Reservation accuracy
   - Ticket delivery and document accuracy
   - Overall quality of service provided.

Additionally, the survey form will identify the Contractor and provide space for customer comments. The Contractor will periodically distribute these questionnaires to 100 percent of ticketed travelers annually. The Contractor will make these responses available to the FD.
<table>
<thead>
<tr>
<th>Quality Measurement</th>
<th>Quality Level</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Exceeds</strong></td>
</tr>
<tr>
<td><strong>Answering Calls</strong></td>
<td>Answers 95% of calls within 20 seconds</td>
</tr>
</tbody>
</table>
| **Emergency Calls**         | Answers at least 90% of calls within 20 seconds, and provides a recorded message for those calls not answered in 20 seconds. The recorded messages will give the traveler at least two options:  
  • To hold  
  • To leave a message for a call back  
Return calls will be made within **30 minutes**. For e-mail or facsimile requests, the Contractor will respond in the same manner as for phone calls – within 30 minutes of receipt. | Answers at least 80% of calls within 20 seconds, and provides a recorded message for those calls not answered in 20 seconds. The recorded messages will give the traveler at least two options:  
  • To hold  
  • To leave a message for a call back  
Return calls will be made within **one hour**. For e-mail or facsimile requests, the Contractor will respond in the same manner as for phone calls – within one hour of receipt. | 79% or less of calls answered within 20 seconds; messages not returned in less than an hour |
| **System Uptime online reservations** | 99% availability | 97% availability | 96% and less availability |
| **Survey Results**          | 95% positive response from users | 90% positive response from users | 89% and less positive response from users |