

## **SAMPLE RFP TEMPLATE - TRAVEL MANAGEMENT SERVICES**

### **1. AGENCY INFORMATION**

- a. Overview: Provide a brief description of the agency including history, years in business, total sales and overview of client base, specifically any experience you have with university business travel.
- b. Contact: Please provide the name, title, e-mail address, and telephone number of primary contact of the Offeror.
- c. ID: Please provide Travel Agency's Tax identification number.
- d. Locations: Describe your office locations and types (full service, on-site, etc.), including affiliate relationships.
- e. Identify the number of university business accounts the Travel Agency has, by size, such as greater than \$10 million, \$7 - 10 million, \$5 - 7 million, \$2 - 5 million, <\$2 million.
- f. Describe your experience and capabilities with organizing group trips such as study-abroad programs and athletics. Include information on recent activity regarding group size, destination and an overview of the services provided.

### **2. DAILY TRAVEL SERVICE REQUIREMENTS**

- a. GDS: List the Global Distribution System supported by your agency.
- b. OBT: What is your experience with on-line booking tools? Do you offer proprietary tool(s) or function as a system integrator (lease of OBT, etc.)? Cite evidence of your ability to successfully support an OBT for large clients and to rapidly achieve improved adoption rates.
- c. Adoption: What have your past/present clients, similar in size and scope of the University, experienced as an average adoption rate of the OBT? For those clients that have high online adoption, what has driven the adoption rate?
- d. Customization: The University prefers that the look of the OBT be customized for the University. Explain to what extent the look of the application can be customized, including the layout, typeface, logos and colors of the interface.
- e. Does the proposed OBT allow for the ability to configure and display University custom messages or news alerts? Explain capabilities.
- f. Expense Management: Does the OBT integrate with automated expense reporting technology? Explain any integration opportunities you offer the University regarding expense management solutions.
- g. The University requires the OBT to display the widest variety of airfares offered, including non-GDS subscribing carriers (i.e. Southwest) and any special web fares. Describe the ability to offer these fares. List all domestic and international air carriers accessible from the OBT.

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- h. Traveler profiles: Describe how you will obtain and maintain traveler profile information.
- i. Policy Compliance: Describe your procedures to ensure traveler compliance with our travel policies for both full service reservations and online bookings.
  - i. Indicate your ability to identify policy exceptions, such as travelers refusing low fares in violation of policy or, travelers who are not booking preferred hotel or rental car suppliers. Describe your ability to identify the above exceptions on a pre-trip and post-trip basis.
- j. Unused tickets: Describe your system to manage a client's unused tickets.
- k. Explain your process for voids and refunds. What is your processing turnaround time?
- l. Fares: Do you offer fare monitoring technology or processes? Describe.
  - i. Do you have a low fare guarantee? Explain.
- m. QC: Describe what quality control processes happen at the time of reservation; between reservation and ticketing; between ticketing and departure; between departure and final return.
- n. Mobile apps: Describe any means for utilizing apps for reservations, itineraries, travel alerts, etc.
- o. VIP: Describe executive services/VIP program you can provide. How are these services managed?
- p. The Travel Agency is required to provide complete invoices for all booked services for trips. Provide a sample of your standard invoice.

### **3. DISCOUNTS AND NEGOTIATIONS**

- a. Airline discount programs: Describe your existing airline contracts and discounts that will be available to University travelers.
- b. Hotel programs: Describe your existing hotel discount programs that will be available to university travelers.
- c. Ground transportation: Explain any relationships with ground transportation providers that may be beneficial to the University.
- d. Airline charters: Explain any relationships with air charter companies that may be beneficial to the University. Also, explain the qualifications and standards that your agency applies when selecting a charter company.

### **4. ACCOUNT MANAGEMENT**

- a. Key Staff Members/Account Configuration: List the names, resumes, years of experience, and responsibilities of all individual(s) to be assigned to/responsible for managing this account.
- b. Regular Hours: The assigned agent(s) shall be available to during regular business hours of 8:00 AM to 5:00 PM local time, Monday through Friday. Describe your plan for backup assistance, covering absences and assisting with unexpectedly high volume.

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- c. After Hours: The travel agency must provide service 24/7/365. Describe how the travel agency's after-hours service program functions.
- d. Performance Monitoring/Customer Service: How do you measure your overall effectiveness in providing travel management services to your customers?
- e. Communication: The travel agency will be required to provide communication and educational assistance to travel planners and travelers. Describe the communication plan the travel agency would propose to ensure awareness of the agency as a single solution provider for the University.
- f. Duty of Care: In the event of a travel emergency, describe your ability to identify, locate and assist travelers. Explain the process to communicate with the University and to assist 24x7 as needed.
- g. Industry News: How will you keep University travelers abreast of important industry news and market updates in a timely and effective manner?

### **5. IMPLEMENTATION**

- a. Provide an implementation plan and schedule of events from estimated award date.
- b. Training: Discuss what training will be provided by the Offeror.

### **6. ACCOUNTING**

- a. Back-Office: Which back-office accounting system will be used? Please describe capabilities.
- b. Data Security: Describe your company's PCI compliance efforts.
- c. Billing: What forms of payment are accepted and preferred?

### **7. REPORTING**

- a. Describe your management reporting system. How is access to this system controlled? What file formats and delivery options are available?
- b. Provide samples of the types of reporting the Travel Agency has available. As part of the response, identify whether the reports are available on-line, in hard copy or both.

### **8. REFERENCES**

Provide at least three references of current university business clients of similar size and scope to our program. References should include a company name, company contact, title, email address and phone number.

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**9. PRICING**

Please submit a detailed cost proposal for providing the services requested. We welcome innovative and non-standard approaches to proposed financial arrangements in the provision of services under this RFP. Vendors are encouraged to submit alternative pricing models but all such submissions shall meet the proposal submission requirements contained in this RFP.

**Full Service Agent Assist Transactions:**

<b>Service Description</b>	<b>Service Fee</b>	<b>Comments</b>
Domestic airline ticket		
Domestic airline ticket refunded		
Domestic airline ticket exchanged		
International airline ticket		
International airline ticket refunded		
International airline ticket exchanged		
Airline ticket that is part of a group-domestic		
Group airline ticket refunded-domestic		
Group airline ticket exchanged-domestic		
Airline ticket that is part of a group-international		
Group airline ticket refunded-international		
Group airline ticket exchanged-international		
Consolidator airline ticket-international		
After-hours emergency phone call		
Car reservation only		
Hotel reservation only		
Rail ticket - domestic and international		
Car service reservation		

**Online Booking Tool Transactions:**

<b>Service Description</b>	<b>Service Fee</b>	<b>Comments</b>
Domestic airline ticket		
Domestic airline ticket refunded		
Domestic airline ticket exchanged		
International airline ticket		
International airline ticket refunded		
International airline ticket exchanged		
Change or cancellation with a travel agent to an airline ticket, hotel, and/or car reservation purchased through the OBT		

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Assistance with purchase of airline ticket, hotel reservation, car reservation begun in the OBT, but completed with a travel agent		
Car reservation only		
Hotel reservation only		
Applying a ticket credit to an airline reservation		

**Miscellaneous Services:**

<b>Service Description</b>	<b>Service Fee</b>	<b>Comments</b>
Auxiliary reservation tool (Booking Builder, etc.)		
Customized reports not listed in scope of work (per hour fee)		
Call to the OBT Help Desk		
Reporting tool		
Non-standard reports as requested		

**Alternate Pricing**

In addition to the above financial offer, the offeror may submit alternative financial proposals, however the information requested above must be supplied and will be used for proposal evaluation purposes.