

P. O. Box 391
Bartow, Florida 33831

THE SCHOOL BOARD OF POLK COUNTY, FLORIDA
PURCHASING DEPARTMENT
(863) 534-0567

1915 S. Floral Avenue
Bartow, Florida 33830

REQUEST FOR PROPOSAL (RFP) FOR
TRAVEL MANAGEMENT SERVICES

RFP NO: 032-PAH-1108

NOTICE TO INTERESTED PROPOSERS MAILED: November 1, 2007

DEADLINE FOR RECEIPT OF PROPOSALS: November 27, 2007 @ 2:00pm

All times stated in this document refer to the Eastern Time Zone (ET). The normal office hours for the District are from 8:00 a.m. to 5:00 p.m., Monday through Friday, except Board holidays.

Proposals must be submitted in a sealed container, clearly identified as Request for Proposal for Travel Management Services, 032-PAH-1108. Sealed proposals will be received until 2:00 p.m. (ET) on November 27, 2007 in the School Board Purchasing Office at 1915 S. Floral Avenue Bartow, FL 33830. The official clock for the purpose of receiving proposals is located in the Purchasing Office. All proposals must be date and time stamped by the official clock. Proposals will be opened in the Purchasing Offices after the deadline for receiving proposals. Any proposal received in Purchasing after the deadline indicated above will be date and time stamped and will not be opened. It is the vendors' responsibility to see that their proposal is properly received at the correct location.

SECTION 1

1.0 General Information

- (a) The intent of this Request for Proposal (RFP) is to establish an annual contract, which may be renewed annually by mutual agreement of both parties to procure transportation, lodging and other travel related services for the Board. Accordingly, the Board requests proposals from travel agencies or any other qualified full-service travel organization.
- (b) The proposer(s) awarded the contract will be granted rights to provide some or all normal commercial travel services in support of official School Board business. (The Board is considering the possibility of purchasing some airline tickets via the Internet, if it is in its best interest to do so. Any contract resulting from this RFP will not prohibit such purchases). The proposer(s) will also be permitted to provide complete travel services and support to Board personnel, dependents or school clubs and organizations requesting travel arrangements. School clubs and organizations will be encouraged to utilize the services of the awarded proposer(s).
- (c) The Board estimates its annual travel related expenditures to be approximately \$175,000. This is an estimate only and cannot be construed as a guaranteed level of expenditures during the contract period.

SECTION 2

2.0 Instructions to Proposers

All times stated in this document refer to the Eastern Time Zone (ET)-daylight savings time. The normal office hours for the District are from 8:00 a.m. to 5:00 p.m., Monday through Friday, except Board holidays.

Proposal Due Date: Proposals must be submitted in a sealed container, clearly identified as Request for Proposal for Travel Management Services, 032-PAH-1108. Sealed proposals will be received until 2:00 p.m. (ET) on November 27, 2007 in the School Board Purchasing Office at 1915 S. Floral Avenue Bartow, FL 33830. The official clock for the purpose of receiving proposals is located in the Purchasing Office. All proposals must be date and time stamped by the official clock. Proposals will be opened in the Purchasing Offices after the deadline for receiving proposals. Any proposal received in Purchasing after the deadline indicated above will be date and time stamped and will not be opened. It is the vendors' responsibility to see that their proposal is properly received at the correct location.

Provide one original, with manual signature in ink and five photocopies of the proposal. Proposals must be sealed and clearly labeled **RFP-TRAVEL MANAGEMENT SERVICES, 032-PAH-1108** on the outside of the package. The legal name, address, proposer's contact person, and telephone number should also be clearly annotated on the outside of the package. Once accepted, all original proposals and any copies of proposals become the sole property of the District and may be retained by the District or disposed of in any manner the District deems appropriate.

Proposers should become familiar with any local conditions which may, in any manner, affect the services required. The proposer(s) is/are required to carefully examine the RFP terms and to become thoroughly familiar with any and all conditions and requirements that may in any manner affect the work to be performed under the contract. No additional allowance will be made due to lack of knowledge of these conditions.

Proposals not conforming to the instructions provided herein will be subject to disqualification at the sole option of the District.

Any proposal may be withdrawn prior to the date and time the proposals are due. Any proposal not withdrawn will constitute an irrevocable offer, for a period of 90 days, to provide the District with the services specified in the proposal.

2.1 Anticipated Schedule of Events (some dates may change as conditions warrant)

11/01/07	Notice to Interested Proposers Mailed and On-line Posting of RFP
11/27/07, 2:00 pm	Deadline for Receipt of Proposals
11/28/07	Begin Review and Evaluation of Proposals
12/03/07	Interviews with selected firms (if necessary) and ranking
12/05/07	Posting of Recommendation for Selection of Proposer
01/01/08	Contract Period Begins

SECTION 3

3.0 Statement of Work

The specific services to be provided to the Board are:

- (a) The agency shall provide the scheduling and ticketing of some or all air transportation to meet the requirements of the traveler. Tourist, excursion, and other reduced fares are to be specified for Board employees to the maximum extent possible. First Class and Business Class arrangements will be used only when other tourist fares are not available and efforts to secure tourist fares shall continue to the time of departure. In all cases, lowest applicable fares will be arranged.
- (b) Electronic ticket and associated itinerary papers will be delivered to the Board contact person in Bartow, FL. by e-mail, delivery service or U.S. mail. The required documents must be received not less than five normal working days before scheduled departures.
- (c) Information on unused tickets will be retained by the agency for future use or refund.
- (d) Rental car and hotel reservations are to be made upon request. Only compact rental cars are to be reserved unless otherwise specified by the Board. Hotel and motel reservations are to be guaranteed unless otherwise specified. The agency will handle reservation cancellations promptly upon request to avoid "No Show," charges.
- (e) The Board shall be provided a detailed billing on a monthly basis.
- (f) The agency will retain all the records which pertain to Board employee travel for at least two years. These records shall be available for audit by the Board upon reasonable request.
- (g) The agency shall quote both refundable and non-refundable fares.

- 3.1** The agency must have and maintain satisfactory relationships with the various airlines and have participation membership in those professional travel societies or organizations that will enhance the service provided to the Board.

SECTION 4

4.0 **Preparation of Proposals and Contents**

In order to ease comparability and enhance the review process, it is requested that proposals be organized in the manner specified below. Failure to provide the required information will affect the evaluation of the proposal and may be grounds for disqualification.

Table of Contents: Include a table of contents for clear identification of the material by section and by page number.

At a minimum, proposals shall include:

1. A transmittal letter that identifies the entity submitting the proposal and includes a commitment by that entity to provide the services required by the District. The transmittal letter should state that the proposal is valid for 90 days from the day after the date that proposals are delivered to the District. A person legally authorized to bind the proposer to the representations in the response must sign the transmittal letter. Failure to include this information may result in the disqualification of the proposal. By submission and signature of this Transmittal Letter, the proposer certifies full, complete and unconditional acceptance of the contents of this Request for Proposal, all attachments, worksheets, appendices, supplemental materials, and the contents of any addendum released hereto.
2. The types of services the agency proposes to provide. The approach the agency will take to supply the services outlined in detail.
3. A list of references of no less than three corporations or institutions for which similar services are being or have been provided.
4. A summary of the agency's professional affiliations, in particular, membership consortiums, commercial cooperatives with airlines, hotel chains, etc.
5. A detailed profile of the agency which is to include: number of employees; number of years in business; total annual volume of business; data systems capabilities and equipment; and any other information the proposing agency wishes considered.

Continued 4.0

6. An outline of how delivery of electronic tickets passenger receipts and itinerary papers will be handled, including frequency, schedule flexibility, and emergency services available after hours and on weekends or holidays. Also, when short notice arrangements are required, indicate how electronic tickets passenger receipts and itinerary papers will be handled.
7. Provide evidence that the agency is fully bonded.
8. Indicate any revenue sharing proposal that the proposer would be willing to provide to the Polk County School Board, expressed as a minimum monetary amount and/or a percentage of total volume of revenues or receipts of Polk County School Board's account with the agency. The Polk County School Board will not use the revenue sharing proposal as the sole criterion for selection of its travel agency.
9. A specific schedule of fees for all services the agency proposes to provide.

SECTION 5

5.0 Evaluation of Proposals

- 5.1** Proposal submittals will be received and publicly opened. Only the names of respondents will be read at this time.
- 5.2** A Proposal Evaluation Committee will convene, review, evaluate and rank all valid responses submitted based on the evaluation criteria as follows. The evaluation factors will include, but are not necessarily limited to the required information that must be submitted in Section 4 and any other information regarding the firm's overall ability to meet the needs of the District. Although fees and costs will be an important consideration in evaluating proposals, it will not be the only consideration. The order in which the items are listed in Section 4.0 does not necessarily reflect their order of importance. The Procurement Director and/or designee will participate in the evaluation process in an advisory capacity only.

- 5.3** The evaluation of proposals will be conducted as follows:

Phase 1 The committee will review and evaluate the proposals.

Phase 2 If necessary, responding vendors may be invited for interviews to further elaborate on their proposal. (The committee and others may be involved in the interviews.) The proposals will then be ranked.

Phase 3 The committee will make a recommendation to the Superintendent for selection of the vendor.

The District reserves the right to award a contract to the vendor(s) that presents the proposal which, in the sole judgment of the District, best accomplishes the desired results.

- 5.4** The Proposal Evaluation Committee reserves the right to interview any, all or none of the proposers that responded to the RFP and to require formal presentations with the key personnel who will administer and be assigned to provide the services as required in this RFP. This interview is to be based upon the written proposal received.
- 5.5** The evaluation committee shall rank all proposals received which meet the submittal requirements. The evaluation committee reserves the right to negotiate further terms and conditions, including price with the highest ranked proposer. If an agreement cannot be reached with the highest ranked proposer, the evaluation committee reserves the right to enter into negotiations with the next highest ranked proposer and continue the process until agreement is reached.

5.6 The District will not be under any requirement to complete the evaluation by any specific date and reserves the right to suspend or postpone the evaluation process should the need arise due to budget constraints, time constraints or other factors. However, it is anticipated that the review/evaluation process will be completed in a timely manner. The Purchasing Department will endeavor to notify in writing all respondents of any unexpected delays as noted above or otherwise determined.

5.7 Award and Contract: Following the selection and upon final negotiation (if required) of the Contract terms and conditions with the top-ranked proposer, recommendation(s) for contract award, as required, will be submitted to the Superintendent. The Superintendent will recommend to the School Board the award or rejection of any proposal(s).

The School Board, at its sole judgment, will award or reject any or all proposals as is in the best interest of the District and the decision shall be final.

Contract(s) awarded from this RFP will begin on 1/1/08 and will run through 12/31/08.

5.8 Contract Renewal: The contract may be renewable under the same terms and conditions as the original contract for (4) four additional one year periods based upon funding availability and by mutual written consent of both parties.

SECTION 6

6.0 General Terms and Conditions

6.1 School Board Obligations

The District accepts no obligation for the costs incurred in responding to this RFP in anticipation of being awarded a contract. The District reserves the right to select qualified responses to this RFP without discussion of the responses with the proposers. The District reserves the right to reject any or all submitted proposals.

6.2 Vendor Obligations

Vendors are invited to submit proposals in accordance with the requirements outlined in this document. By submitting a signed proposal, a vendor agrees that it fully understands this RFP and must abide by the terms and conditions contained therein. The proposals are required to address all specifications in this RFP and must specifically highlight in the proposal on a page entitled "Exceptions to RFP" any deviations or variations from the commodity/service requested in the RFP. If no such page is included in the proposal, the District will expect the proposer to provide the commodity/service requested in the RFP and to enter into a contract on that basis at their proposed costs, if selected to perform the work. Unauthorized exceptions, amendments, or deviations will not be accepted. The decision of the District will be final in this regard.

Cost of preparation of a response to this request for proposal are solely those of the proposer, and the District assumes no responsibility for any such costs incurred by the proposer.

The responsibility for determining the full extent of exposure to risk and verification of all information rests solely with the company submitting a response. Neither the District nor its representatives shall be responsible for any error or omission in this request for proposal, nor the failure on the part of the responder to determine the full extent of exposure to risk.

6.3 Lobbying

Proposers are hereby advised that lobbying is not permitted with any district personnel or board members related to or involved with this RFP. All oral or written inquiries must be directed through the Purchasing Department.

Lobbying is defined as any action taken by an individual, firm, association, venture, partnership, syndicate, corporation, and all other groups who seek to influence the governmental decision of a board member or district personnel on the award of this contract.

Any proposer or any individuals that lobby on behalf of proposer will result in rejection/disqualification of said proposal.

6.4 Open Records

All responses to this RFP are subject to release as public records. Proposers are advised to consult with their legal counsels regarding any material in their proposals that the proposer believes should not be public record. The District assumes no obligation or responsibility for asserting legal arguments on behalf of potential vendors.

6.5 Contract Elements

The requirements appearing in this RFP will become part of the contract with the proposer. The contract between the parties will consist of a written Agreement (if required by the District), the RFP, and the successful proposal, together with any modifications that are agreed to by the District and the proposer.

6.6 Public Entity Crimes Statement and Convicted Vendor List

In accordance with Section 287.133(2)(a), Florida Statutes, the following information is part of this RFP:

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list. The prospective bidder certifies, by submission and signature of this bid, that neither the bidder, nor its principal, its agent or its representative is presently debarred suspended, proposed for debarment, declared ineligible, voluntarily excluded from participation in this transaction or otherwise precluded by Florida Statute 287.133 from participating in this contract.

6.7 Discriminatory Vendor List

Per the provisions of Florida Statute 287.134(2)(a), “An entity or affiliate who has been placed on the discriminatory vendor list may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity.” The prospective bidder certifies, by submission and signature of this bid, that neither the bidder, nor its principal, its agent or its representative is presently on the discriminatory vendor list, or otherwise precluded by Florida Statute 287.134 from participating in this contract.

6.8 Conflict of Interest

The proposer must disclose any contractual relationship that exists or has existed during any part of the period of time from January 1, 2000 through the present, between the proposer, or a predecessor organization of the proposer, or a subcontractor included in the proposer's response to this RFP, and the Polk County School District. Not every prior or existing contractual relationship will constitute a conflict of interest. However, each such relationship must be disclosed. Proposer should not merely state the conclusion that no conflict of interest exists. Proposers also must disclose any existing business or personal relationship between the proposer, its principals, or any affiliate or subcontractor, and the District, or any other entity or person involved in the project that is the subject of this RFP.

Failure to disclose any such prior or existing contractual or personal relationship as described in this section may result in disqualification of the proposal. The District will make the final determination regarding the existence of a conflict of interest.

6.9 INSURANCE - The contractor(s) shall take every precaution to prevent injury to persons, particularly children, or damage to public or private property while performing services under this agreement. He shall assume full responsibility for such occurrences if resulting from his operations. Before commencing work, the contractor shall furnish the School Board a certificate of insurance showing his coverage with the following minimum requirements:

<u>TYPE OF INSURANCE</u>	<u>LIMITS OF LIABILITY</u>
Worker's Compensation	Statutory
Commercial General Liability	Combined Single Limit \$1,000,000 per occurrence
Automobile Liability	\$ 500,000 Combined single limit (All owned autos, or any auto if vehicles other than owned are used).

a) The School Board of Polk County shall be named as an additional insured on the certificate for all required insurance. All insurance must be issued by a company or companies approved by the School Board.

b) The **VENDOR** shall be responsible for assuring that the insurance remains in force for the duration of the contractual period, including any and all option years that may be granted to the **VENDOR**. **A Certificate of Insurance shall contain the provision that the SBPC LOCATION be given no less than thirty (30) days written notice of cancellation.** If the insurance is scheduled to expire during the contractual period, the **VENDOR** shall be responsible for submitting any new or renewed Certificate of Insurance at a minimum of fifteen calendar days in advance of such expiration.

6.10 Payment to Vendor

Payment under the contract will be made following receipt and approval of required services/deliverables. Invoices must be submitted in detail sufficient to enable a proper audit of charges for completed work.

6.11 Pricing

Prices bid for all items shall be F.O.B. Destination and include all shipping charges to all Polk County school locations.

6.12 Line Item Corrections

The use of correction fluid or erasures to correct line item bid prices and/or quantities are not acceptable. Corrections must be by strikethrough (~~strikethrough~~) of the incorrect figures, writing in of correct figures and initialing of the corrections by the originator. Correction fluid or erasure corrected bids will be considered non-responsive for the corrected items only.

6.13 Protest Procedures

Any person who may be adversely affected by an intended decision with respect to the award of any bid, may protest such a decision by following the Bid Protest Procedure of the School Board of Polk County. A copy of the Procedure, which has been prepared in accordance with the provisions of the Florida Administrative Code, is available upon request and is permanently posted at the Administrative Offices of the School Board of Polk County, Florida. Failure to follow the requirements of the bid protest procedure shall constitute a waiver of all protest rights. Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.

6.14 Contingency of the Contract Award

Award of the contract to the selected firm is contingent upon:

- the budget and appropriation of funds (if necessary) by Polk County, and
- the successful negotiation of contractual terms agreeable to both parties.

Failure to achieve the foregoing may result in no award of contract at this time.

6.15 Other Contracts

The Board may undertake or award other contracts for work not being performed acceptably by the vendor and/or work not being accomplished on time by the vendor

6.16 Use of Other Contracts

The School Board reserves the right to utilize any other District contract, any State of Florida Contract, any contract awarded by any other city or county governmental agencies, any other school board, or any other community college/state university system cooperative bid agreement, in lieu of any offer received or award made as a result of this RFP, if it is in its best interest to do so. The School Board also reserves the right to separately bid/request proposals for any single project/item/service, or to purchase any item/service on this RFP if it is in its best interest to do so.

6.17 Additional Information:

All proposals, whether accepted or rejected, shall become the property of the District.

The District reserves the right to reject any and all proposals and to request additional proposals or to negotiate modifications of submitted proposals if deemed necessary and in the best interest of the District to do so. The District reserves the right to waive minor irregularities in the proposals.

Should proposals require additional clarification and/or supplementary information, firms should be prepared to submit such additional clarification and/or supplementary information, in a timely manner, when so requested. The Purchasing Director or designee may arrange for discussions with firms submitting proposals, if required, for the purpose of obtaining additional information or clarification.

The District reserves the right to alter, amend, or modify any provisions of this RFP, or to withdraw this RFP at any time prior to the award of a contract pursuant hereto, if it is in the best interest of the District to do so. The decision of the District will be final in this regard.

The District may modify the Request for Proposal at any time prior to the proposal due date by issuance of a written addendum to all vendors who are participating. Addenda shall be numbered consecutively and initiated by the Purchasing Director. No other person shall be authorized to make changes verbally or in writing. Any addendum received shall be signed and returned by the proposer (returned with their proposal). Any such addenda issued will be posted to the same website where this RFP is posted, at www.polk-fl.net/purchasing. It shall be the responsibility of the proposer to be sure they receive all addenda.

The District reserves the right to accept or reject any or all proposals.

The District shall be the sole judge of proposers' qualifications.

The District reserves the right to waive irregularities and technicalities and may, at its sole discretion, request a clarification or other information to evaluate any or all proposals.

The District reserves the right, before awarding the contract, to require proposer(s) to submit evidence of qualifications or any other information the District may deem necessary.

6.17 The District reserves the right, prior to Board approval, to cancel the RFP or portions thereof, without penalty.

The District reserves the right to: (1) accept the proposals of any or all of the items it deems, at its sole discretion, to be in the best interest of the District; and (2) the District reserves the right to reject any and/or all items proposed or award to multiple proposers.

Nothing herein will prevent the School Board of Polk County, Florida, from making multiple awards and to deem all proposals responsive, and to assign work to any vendor deemed responsive.