

Request for Proposals: International Event Management Contractor

Proposal Due date: November 12, 2016

Submit to: Kevin Bradley, Senior Specialist, Emerging Infectious Disease (kevin.bradley@aphl.org); copy Melissa Warren, Senior Specialist, Influenza (melissa.warren@aphl.org)

Summary

The Association of Public Health Laboratories (APHL) is seeking to identify a qualified pool of expert event and travel management contractors to support various international training courses, meetings and APHL Infectious Disease (ID) programmatic efforts. APHL expects to provide funding to selected applicants on a cost-reimbursable basis. Funding will be awarded via a contract with APHL for each event as it is identified by APHL Infectious Disease Program staff.

Background

APHL's Infectious Disease program supports a variety of work in collaboration with the US Centers for Disease Control and Prevention (CDC). One element of this work is laboratory capacity building through coordinating in-person meetings and infectious disease trainings around the world. APHL frequently works with event management or travel contractors to secure facilities, arrange travel and accommodations as well as prepare event materials and onsite support. These events vary in size and scope and range from 10 participants to 60 participants on average. Many involve laboratory training components and will be held at laboratory institutes identified by CDC and/or APHL. Otherwise, events may take place in event spaces such as hotel conference rooms. Typically, participants come from a variety of countries in a specific region, but at times event participants may span multiple regions. Most often these events are held in international destinations, but there are occasions where international participants are traveled to the US. APHL and CDC provide the faculty for these courses and will often send 1-3 staff members for additional on-site support and course or meeting facilitation.

To meet the anticipated needs of upcoming ID programmatic efforts in an efficient manner, APHL is seeking to build a pool of qualified applicants to support the travel and meeting logistics associated with international events through this request for proposals (RFP). As events requiring contractor support are identified, APHL will select a contractor from the established contractor pool to perform the work. The selection process for individual events is described in [Post Award](#).

Expectations of the selected vendor(s) are outlined in [Appendix A: Expectations](#).

Eligibility

This is an open and competitive process. Successful applicants must be able to meet the expectations outlined in [Appendix A: Expectations](#).

Anticipated RFP Schedule

APHL anticipates the following schedule:

October 13, 2016	–	RFP Issued
October 25, 2016	–	Informational teleconference for RFP questions and answers (see Additional Information and Deadlines for Application Submission for call details)

November 1, 2016	–	Letter of Intent Due
November 12, 2016	–	Vendor Proposal Due
November 21, 2016	–	Proposal review completed
November 28, 2016	–	If needed, follow-up interviews, verification of references, and updated proposal due
November 29, 2016	–	Final review completed and awardees notified
November 30, 2016	–	Draft contract for March 2017 event submitted to APHL Legal Dept. for final internal review

Any modification to this anticipated schedule will be communicated on APHL’s procurement website (www.aphl.org/rfp).

Response Submittal

Confirmation of Intent to Respond

Confirmation of Intent to Respond APHL requests that prospective applicants submit a brief email statement to kevin.bradley@aphl.org (copy melissa.warren@aphl.org) indicating an intent to submit a proposal. This must be received by **5:00 pm EST on November 1, 2016**.

Final Response

APHL must receive complete responses by **5:00 pm EST, on November 12, 2016**. Please see [Proposal – Required Submissions](#) for items that must be included in the completed proposal. Applicants may send proposals by the following methods:

Via email to kevin.bradley@aphl.org (copy melissa.warren@aphl.org) or
Via Mail (USPS, FedEx, UPS) addressed to:
Association of Public Health Laboratories
Attn: KEVIN BRADLEY
8515 Georgia Avenue. Suite 700
Silver Spring, MD 20910

APHL will send an email acknowledging the receipt of your application; if you do not receive an acknowledgement within 48 hours, please email the RFP points of contact above to confirm receipt.

Award

APHL will select up to five applicants, depending on the strength of applications. Each selected applicant will be eligible for applying for events as they are announced to the established contractor pool. Award amounts will depend on the scope of the proposed event with the minimum award per event of \$25,000. Funding will be distributed via a contract administered with APHL. See [Post Award](#) for more information on how vendors in this pool will be selected for individual events.

Term of Project

The project term will be from the date of the selection of the final contractor through the current funding year under Cooperative Agreement Number NU60OE000103, ending September 29, 2017. APHL anticipates the potential for additional funding to be made available annually (with additional funding years running from September 30 to September 29, and July 1 to June 30) for a maximum of four additional years (ending September 29, 2021). The project term refers to the length of time the selected contractor pool is to be maintained. Each individual event will have a specific start and end date outlined in the event contract. The first contract start date is currently scheduled to be December 1, 2016 for a March 2017 event. Events scheduled prior to March 2017 do not apply to this RFP.

Evaluation Team

APHL staff, led by the Influenza Program Senior Specialist, will conduct an initial review of all proposals for completeness. Any application that is incomplete on the proposal due date specified in the [Anticipated RFP Schedule](#) Section above will not be considered and will not receive a formal evaluation.

Complete proposals will be reviewed by a team of five subject matter experts (SMEs) familiar with international event planning. The evaluation team will consist of 2 APHL staff, 2 CDC employees and 1 APHL member.

APHL will ask potential reviewers to disclose any real or perceived conflict of interest prior to the start of the evaluation process or to affirm that they have no conflict of interest that would preclude an unbiased and objective review of the proposals received. APHL will not select reviewers with a perceived conflict of interest. Reviewers will complete and sign a conflict of interest form.

Once potential reviewers have been identified, APHL's Senior Director of Public Health Systems will have final approval over the evaluation team's composition.

Evaluation Criteria

The evaluation team will evaluate proposals based on the responses to the questions above and will give a numeric score of up to 100 maximum points based on the scorecard template in [Appendix B](#): International Training Event Contractor RFP Score Card.

Prior experience internationally, coordinating trainings, or planning events similar to those in size and type of the event described in the background are considered enhancing factors for this RFP. Applicants will also be given preference based on more extensive experience with the ability to comply with expectations laid out in [Appendix A](#): Expectations for International Event Management Contractor. In order to maintain a competitive and open process, applicants that have previously worked with APHL will not be given preference unless there is a need to decide between two or more substantially similar proposals. Additionally, past negative performance can be shared by APHL staff with the evaluation team and taken into consideration by the reviewers in the final selection process.

In making a final selection of the pool of contractors, the evaluation team will make a selection of up to 5 contractors based on the following:

- Final numerical scores of participants based on the [Appendix B: International Training Event Contractor RFP Score Card](#),
- Comments noted by individual reviewers on specific proposals and discussed by the evaluation team that either enhance or detract from a contractor's standing based on numerical scores,
- Past performance, including feedback from client references, if contacted, and
- Most relevant experience to the types of international events APHL typically coordinates within the Infectious Disease Program.

Evaluation Process

The entire review will be conducted via a combination of email communication between APHL's Influenza Program Senior Specialist and the members of the evaluation team or among the evaluation team members and teleconference and/or webinar evaluation sessions. APHL's Influenza Program Senior Specialist will coordinate the review process and the evaluation sessions.

The reviewers may request follow-up interviews with all or some of the applicants, contact applicant references and, following these interviews, may request supplemental information on an applicant's proposal. References will be contacted at the discretion of the review team if additional information is needed or to corroborate any part of an application. References may not be contacted for all applicants. These interviews and any supplemental information would clarify a contractor's capacity or experience in one or more of the evaluation criteria or to explain other information contained in an applicant's proposal and would be conducted with at least one representative from the evaluation team.

In cases where all other evaluation criteria are substantially similar, the evaluation team may receive documentation from APHL staff on an applicant's past performance in other capacities noted in this RFP as part of the evaluation criteria.

Post-Evaluation Procedures

APHL staff will notify the selected vendors within ten business days of the completion of the evaluation and will post the names of the selected recipients to APHL's procurement website, www.aphl.org/rfp on the same day. Unsuccessful applicants will receive notification of these results by e-mail or by U.S. mail within 30 days of the date the name of the winning contractor is posted.

All applicants will be entitled to utilize APHL's RFP Appeals Process to formulate a protest regarding alleged irregularities or improprieties during the procurement process. Specific details of this policy are located on the procurement website.

Conditions of Award Acceptance

The eligible contractors must be able to contract directly with APHL. Contractors must agree to comply with expectations outlined in [Appendix A: Expectations](#).

Post Award

As events requiring contractor support are identified, APHL will solicit certain contractor budgets from the established contractor pool based on current needs. Contractors may accept or decline the

opportunity to submit a budget at the time of each event announcement. APHL will select contractors for work based on the following criteria:

1. Logistical needs of the event in relation to contractor experience and expertise;
2. Timing of the event in relation to planning periods/event dates for other APHL ID program events;
3. Location of event in proximity to the contractor or relevant past experience in a specific location; and
4. Proposed budget submitted by the contractor.

If all of the aforementioned items are substantially similar among contractors, APHL reserves the right to select a vendor based on diversification of funding allocations among the pool.

Proposal – Required Submissions

To submit a proposal for consideration, applicants must respond to ALL of the following questions. Responses should be limited to no more than eight double-spaced pages (font size $\geq$ 11pt and page margins of $\geq$ 1 inch) and must comply with submission requirements set out in Additional Information and Deadlines for Application Submission Below.

1. **Please describe your organization's experience with coordinating international events.**

Responses must include, but are not limited to, the following:

- a. The types of events you have planned. Include three examples of past event(s), including client contact information to serve as references. The evaluation team may choose to contact references;
- b. Size of past event(s), including number of participants;
- c. International (outside of US) experience, including a list of countries where you have previously worked;
- d. Experience supporting visa application processes;
- e. Years of experience;
- f. Data feed integration plan (see options outlined in Appendix A);
- g. Experience negotiating hotel contracts; and
- h. Experience providing onsite support

2. **Do you make airline reservations through a Global Distribution Network?**

- a. Yes/No

3. **Do you have business travel accident insurance (or an equivalent) or are you able to obtain short term insurance? Please describe what you would do in the event of a participant requiring a medical evacuation, including the responsible party for any expenses incurred.**

- a. If you need to procure travel insurance per person per trip, please describe your process for this, typical rates, coverage and how the expenses would be covered (i.e., through indirect fees or cost-reimbursement to APHL).
4. **Do you have commercial liability insurance (or equivalent)? Please describe what you would do in the event of your onsite staff getting robbed of cash stipends, including the responsible party for any expenses incurred.**
5. **What mechanisms do you have for stipend disbursement?**
 - a. Can you accommodate wire transfers?
 - b. Can you accommodate cash disbursement onsite in USD and/or local currency?
6. **Please describe how you would accommodate travelers while in transit if they required assistance.**
 - a. How would participants get in touch with you?
 - b. What are your after-hours procedures?
7. **How do you gather information from participants with regards to making arrangements (e.g., email, website)?**
 - a. What information do you routinely collect? If appropriate, feel free to include screenshots or mock-ups.
8. **What are your rates and/or how do you calculate your staff time and overhead/administrative fees for pre- and post-event support? How do you determine these fees for onsite support?**
9. **Please provide a budget for each of the proposed events outlined below. The budget should be divided into the line items reflecting the total cost for the category (i.e. not per person). Please note these are real scenarios and the budgets submitted for this question will not only inform the RFP awards, but will also be used for the actual selection of a single contractor to support each of these events in March 2017.**

APHL and CDC are coordinating a 5 day laboratory training in Dakar, Senegal for 15 participants from different countries in Africa. The training will be March 27 – 31, 2017. Two APHL ID program staff, 3 APHL instructors, and 3 CDC staff will travel to Dakar for the duration of the course. APHL has requested your services for the activities listed below:

***Influenza Virus Isolation Training
Dakar, Senegal
March 27-31, 2017***

Dakar Meals & Incidentals \$107: breakfast \$16, lunch \$27, dinner \$43, incidentals \$21

Activity/procurement Item	Note	Cost Per Item
Meeting Related	15 participants, 10 instructors/staff	
3-ring binder with dividers		
Printed materials (approx. 75 pages, b&w)		
Name tags		
Table tent name cards		
Certificates		
2G USB flash drive with course materials		
Catered welcome reception	appetizers, non-alcoholic beverages	
Catered lunch	daily, no more than \$27 per person	
Accommodation and M&IE	15 participants	
Guestroom with breakfast	\$180 per person (or rate as close as possible), per night, 5 nights	
M&IE travel days	\$107 per person, 1 day	
M&IE training days	\$64 per person, 5 days	
Airfare / Origin	15 participants	
Roundtrip airfare to/from Dakar		
Ground Transportation		
Airport - Hotel (private driver per person for 15 participants)		
Hotel - Laboratory in Dakar (daily, roundtrip shuttle for 30 participants, instructors and staff)		
Hotel - Airport (private driver per person for 15 participants)		
Miscellaneous		
Onsite coordinator		
Planning and indirect fees		
GRAND TOTAL \$		

APHL and CDC are coordinating a 3 day laboratory training in Entebbe, Uganda for 28 participants from 14 different African countries. The training will be March 7-9, 2017. One APHL ID program staff member, 3 APHL instructors and 2 CDC staff will travel to Entebbe for the duration of the course plus one additional day for course set-up. APHL has requested your services for the activities listed below:

***Infectious Disease Specimen Handling, Packaging and Transport Training
Entebbe, Uganda
March 7-9, 2017***

Entebbe Meals & Incidentals \$77: breakfast \$12, lunch \$19, dinner \$31, incidentals \$15

Activity/procurement Item	Note	Cost Per Item
Meeting Related	28 participants, 6 instructors/staff	
3-ring binder with dividers		
Printed materials (approx. 75 pages, b&w)		
Name tags		
Table tent name cards		
Certificates		
Class photo for all participants (printed)		
2G USB flash drive with course materials		
Catered welcome reception	appetizers, non-alcoholic beverages	
Catered lunch	daily, no more than \$19 per person	
Accommodation and M&IE	28 participants, 6 instructors and	
Guestroom with breakfast	\$215 per person (or rate as close as possible), per night, 3 nights	
M&IE travel days	\$77 per person, 1 day	
M&IE training days	\$46 per person, 3 days	
Airfare / Origin	28 participants	
Roundtrip airfare to/from Entebbe		
Ground Transportation		
Airport - Hotel (private driver per person for 15 participants)		
Hotel - Laboratory in Dakar (daily, roundtrip shuttle for 30 participants, instructors and staff)		
Hotel - Airport (private driver per person for 15 participants)		
Miscellaneous		
Onsite coordinator		
Visa application assistance		
Planning and indirect fees		

GRAND TOTAL \$

Additional Information and Deadlines for Application Submission

All questions should be directed to Melissa Warren at melissa.warren@aphl.org. Questions received from interested contractors, together with the answers provided by APHL staff will be posted to APHL's procurement website (www.aphl.org/rfp).

Letters of intent and proposals should be submitted to Kevin Bradley at APHL (kevin.bradley@aphl.org; 8515 Georgia Ave Suite 700, Silver Spring, MD, 20910; telephone: 240-485-2739; fax: 240-485-2700). For electronic submissions, copy melissa.warren@aphl.org.

A letter of intent is due by November 1, 2016 by 5:00 pm ET and is a requirement for anyone who wishes to submit a proposal.

Proposals must be received at APHL, attention Kevin Bradley by close of business (5:00pm ET) November 12, 2016. Either electronic or physical submission is acceptable. APHL will send an email acknowledging the receipt of your proposal; if you do not receive an acknowledgement within 48 hours, call 240-485-2739 to confirm receipt.

An optional informational teleconference will be held October 25, 2016 at 12:00 pm ET. The purpose of this call will be to provide a brief overview of the project and to allow potential applicants to ask CDC and APHL questions. Please come with questions prepared.

Phone: 877.915.4937, Passcode: 1911175#

Appendix A: Expectations for International Event Management Contractor

Travel Management and Coordination

The selected contractor will be responsible for communicating with event participants and booking all necessary airfare and ground transportation for event participants. Travelers are responsible for navigating the visa system and securing their visa, if needed, but the selected contractor will provide draft itineraries for visa applications, answer participant questions to assist in the application process, keep track of participant's visa status (received or not), assist APHL with providing business letters and process cost-reimbursements to participants for visa expenses incurred. When visas are required for travel, the contractor may not book flights for a participant until their visa is secured. Bookings must be in accordance with APHL travel policy and transit through certain cities may be prohibited due to security concerns. For all events, participant travel information must be transferred to an international security assistance company designated by APHL, currently [International SOS](#).

Data Feed Integration

To be eligible for consideration, contractors must be able to accommodate one of the options below to transfer participant travel information. APHL will give preference to applicants who are able to do option 1.

- Option #1: Contractor direct reporting to the Global Distribution Service (GDS)
 - If using this (preferred) option, contractors will include the international security assistance company designated by APHL in the report sent to the GDS when the contractor books travel on behalf of APHL.
 - APHL may require additional documentation such as Data Transfer Authorizations to initiate this type of data sharing. The Contractor will alert APHL to any such documentation and the APHL ID program staff point of contact will facilitate obtaining the necessary information.
 - To connect to our current international security assistance company with a direct data feed, there will be a fee associated with this setup. APHL will cover the fee charged by International SOS for the data feed setup, but the time and expenses incurred by the contractor will be at their own expense for the setup of this feed. To receive enhanced preference scores for being able to provide a direct data feed, please provide proof of your connection to GDS that we will be able to leverage.
- Option #2: Non-TMC indirect reporting via APHL
 - The Contractor will aggregate participant travel data in a [CSV file](#) to send to APHL via secure file transfer. The data must be delivered to APHL exactly as outlined in the attached [CSV example file](#). APHL will upload the data to the appropriate source.
 - The process would need to be tested in advance of participant travel.
 - Changes to itineraries must be updated in the same [CSV file format](#) and resubmitted to APHL prior to travel initiation or within 24 hours if during the travel period.

Hotel Accommodations

Contractors may or may not be responsible for identifying hotels for each event. Post award event announcements will include whether a hotel has already been identified by APHL, CDC or international partners. If a hotel has been identified, it must be used for participant lodging unless otherwise stated in writing from APHL program staff. Event participants, instructors, support staff and the contractor (when onsite support is required) should be housed at the same hotel when possible. If the contractor is responsible for identifying suitable hotels, the contractor will provide quotes (ideally 3) to APHL for review and approval prior to securing the location.

Event Venue

Many of the events APHL coordinates utilize laboratory space at a host institution. Occasionally there may be a need for the contractor to secure a venue for the event, which APHL will clearly state in the event announcement to the contractor pool. If the contractor is responsible for identifying a suitable meeting space, they will provide quotes (ideally 3) to APHL for review and approval prior to securing the location. If a hotel is proposed as a meeting venue, the contractor should reserve participant guestrooms at the same hotel.

Meeting Materials

The selected contractor will be responsible for providing and distributing/setting up meeting materials. The content of any printed material will be provided by APHL in a timeline outlined in the event contract. The event announcement will include a detailed list of materials for creating a budget that may include, but is not limited to, the following: 3-ring binders with dividers; printed, hole punched, and collated slide handouts from presentations; participant contact list; laboratory protocols, worksheets, and references; name tent cards; name badges, holders, and clips/lanyards; 2GB USB flash drive loaded with event materials; notepads; pens; highlighters; signage; attendance sheets; and certificates in document covers. Translation services for printed material may be requested.

Onsite Support

Event announcements may indicate the need for onsite contractor support. This generally requires 1-2 people from the contractor's organization to ensure smooth operation of onsite logistics, set up the venue, and provide additional support as requested by APHL ID program staff and participants. Activities may include, but are not limited to, the contractor meeting participants at the hotel, ensuring participants are shuttled between the hotel and the event venue, setting up event materials at the event venue, taking a group participant photo and coordinating with additional onsite vendors, such as caterers. The selected contractor will also be responsible for troubleshooting any travel disruptions, such as missed connections, and will work directly with participants to book additional ground/air transportation as necessary.

Stipend Disbursement

The selected contractor will provide stipends to event participants in cash or wire transfer as directed by APHL ID program staff. Stipends are to include per diem for meals and incidentals at the rates determined by the [US Department of State](#) for international destinations and [US General Services Administration](#) for domestic locations and are to cover the length of the event and travel days. If any meals are provided through the event, such as hotel breakfast, lunch catering services or evening reception, stipends should be reduced by the relevant amount as listed in the [Meals and Incidentals Expense Breakdown](#). Stipends are also to include any visa application fees, ground transportation or other fees described in the event announcement. All stipends should be submitted to APHL ID Program Staff for approval prior to disbursement. Stipend disbursement and related documentation will be included as contract deliverables.

Performance Management and Evaluation

APHL will monitor performance by timeliness of responses to APHL, participant requests and successful completion of all contracted deliverables. APHL may remove contractors from the pool at the discretion of the APHL ID Program Director if the outlined expectations are not consistently met.

Appendix B: International Training Event Contractor RFP Score Card

The following table is a copy of the score card that will be used to evaluate RFP responses.

Category	Maximum Value	Score	Comments (REQUIRED)
Experience with coordinating international events. Responses must include, but are not limited to, the following: <i>Types of events planned, including three examples of past event(s) with client contact information to serve as references; Size of past event(s), including number of participants; Countries and familiarity with visa requirements; Years of experience; data feed integration plan, experience negotiating hotel contracts, experience providing onsite support</i> High: routinely coordinates international events with participants from around the world, has experience with events similar to APHL needs described (21-30 points) Moderate: does not routinely work internationally, but has extensive event planning/travel experience and/or planning experience is less relevant to APHL events (11-20 points), Limited: does not have international experience, but demonstrates potential capacity by other event planning/travel experience (1-10 points), No experience or does not address all required items = 0	30		Type comments here. (REQUIRED)
Does the applicant make airline bookings through a GDS? Yes: 15 points No: 0 points	15		Type comments here.
Does the applicant have business travel accident insurance (or equivalent) or are they able to obtain short term insurance? Evaluate what applicant would do in the event of a participant requiring a medical evacuation, including the responsible party for any expenses incurred. Preferred: Business travel accident insurance or equivalent (6-10 points) Acceptable: No insurance, but is able to obtain short term coverage or equivalent and clearly explains how this expense will be passed to APHL through indirect fees or cost-reimbursement (1-5 points) Unacceptable: No clear policy or plan to address this need (0 points)	10		Type comments here. (REQUIRED)
Does the applicant have commercial liability insurance (or equivalent)? Evaluate what applicant would do in the event of a participant getting mugged while at the event and losing their stipend, including the responsible party for any expenses incurred. Preferred: Commercial liability or equivalent (6-10 points) Acceptable: No insurance or equivalent, but is able to obtain short term coverage or equivalent (1-5 points) Unacceptable: No clear policy or plan to address this need (0 points)	10		Type comments here. (REQUIRED)

Category	Maximum Value	Score	Comments (REQUIRED)
Does the applicant have acceptable mechanisms for stipend disbursement? Preferred: Able to do both wire transfers and cash disbursement (6-10 points) Acceptable: Is able to do either wire transfer or cash disbursement (1-5 points) Unacceptable: Unable to address this need (0 points)	10		Type comments here. (REQUIRED)
Does the applicant have procedures in place for travelers to easily receive assistance? Preferred: 24/7 POC with international toll free telephone number or monitored inbox (6-10 points) Acceptable: Has limited hours of access or mode of communication (1-5 points) Unacceptable: Unable to address this need (0 points)	5		Type comments here. (REQUIRED)
Does the applicant have a reasonable budget for the proposed event? <i>Evaluate the budget for completeness and realistic cost estimates. Compare costing from previous APHL events and competitiveness** with other applicants.</i> Top 50% ranking: Complete competitive budget with realistic cost estimates (21-30 points) Bottom 50% ranking: Less competitive budget, unclear costing, or unrealistic budget (1-20 points) Unacceptable/unable to evaluate: Incomplete budget, unable to evaluate, or substantially not competitive (0 points)	20		Type comments here. (REQUIRED)
TOTAL SCORE	100	_____	

**Competitive budget ranking is to be done by each member of the evaluation team. Rank all applicant budgets against one another for completeness, clarity and realistic estimates. For example, a lower budget may rank in the bottom 50% if the costs are not realistic estimates for the proposed item. Rank applicants in ascending order, with 1 as the highest/best budget.

Rank: ____/____