



INVITATION

TENDER

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INVITATION TO TENDER

IPT FY24 - 01 Travel Management Services

1. Background Information on Plan International

Plan International is an independent development and humanitarian organization that advances children's rights and equality for girls.

We believe in the power and potential of every child, but this is often suppressed by poverty, violence, exclusion and discrimination, and its girls who are most affected. Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children.

We support children's rights from birth until they reach adulthood, and we enable children to prepare for – and respond to – crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

We have been building powerful partnerships for children for over 85 years and are now active in more than 75 countries.

Read more about Plan International's Global Strategy: **Girls Standing Strong** at <https://plan-international.org/strategy>

2. Summary of the Requirement

Plan International are inviting interested parties to bid for the supply of Travel Management Services to Plan International offices based in Romania, Poland, Ukraine and Moldova. Successful Bidder(s) will be expected to enter into a Long-Term Agreement for a period of 2 years with a possible extension of 1 year on a non-exclusive basis with our organization. Plan International reserves the right not to award a contract as a result of this Invitation to Tender, or to award it to multiple successful Bidders.

2.1 IPT Overview and Instructions

This Service Level Agreement (SLA) sets out the minimum expected level of service from the Supplier. It is intended to form the bases of the agreement between the successful Tenderer and Plan International.

Plan International will seek (as part of the implementation period) to develop these SLAs and Key Performance Indicators (KPIs) with the successful Supplier, to obtain a mutual agreement of travel services provision between the Supplier and Plan International offices.

The ability to meet the proposed SLAs will be assessed in the technical evaluation of the Tenderer's proposal.

The purpose of the SLA is to ensure that the correct elements and commitments are in place to provide consistent travel service support and delivery to Plan International by the Supplier.

The objectives of the SLA are to:

- Provide clear reference to service ownership, accountability, roles and/or responsibilities.
- Present a clear, concise and measurable description of service provision.
- Measure actual service support and delivery against expected service provision.

Account Management

The Supplier is required to provide an account manager to cover contracted Plan International offices to provide regular Management Information to demonstrate service delivery. Plan International will expect proactive and co-operative account management particularly in relation to any remedies that may be proposed in respect of poor or failed performance.

Quarterly review meetings shall be held between Supplier and Plan International to discuss the following:

1. Agreement status and proposed modifications to contract
2. Savings reports
3. Review KPIs and Service level issues
4. Innovation and Continuous Improvement
5. Future business plans
6. Any other relevant issues

Plan International Contract Management Responsibilities

Plan Limited will be responsible for the overall Contract Management of this Agreement. Plan Limited will nominate a single point of contact, based in one of the offices from Poland, Romania, Moldova and Ukraine, as part of a phased approach, who will co-ordinate and manage all service issues, complaints and resolutions and feedback to and from the supplier. Plan Limited will be responsible for accurately and transparently apportioning any rebate, discounts or reimbursements throughout this contract. A nominated contact will be responsible for managing the individual Service Agreements for each Plan International office/account.

Plan Limited will conduct itself in a professional manner with the supplier, working towards building a good collaborative relationship of transparency and trust. Neither party will take advantage of any genuine errors.

Please refer to '**Annex A - Specifications**' for full details of the requirement

2.2 Instructions to Tenderers

These instructions are designed to ensure that all Bidders are given equal and fair consideration. It is the Bidders responsibility to ensure their offer is complete and that you provide all the necessary information asked for in the format specified, or risk your offer being rejected. Further details can be found in section 7 of this IPT document, 'Submission Checklist.'

Women-owned businesses and companies actively engaged or advancing gender equality and women empowerment in the workplace are especially encouraged to apply.

Documents comprising this tender pack are as follows:

- IPT FY24_01 Plan Tender Dossier
- ANNEX A – Specifications
- ANNEX B - Pricing Schedule
- ANNEX C - Tender Questions
- ANNEX D - Supplier Questionnaire
- ANNEX E - Plan International General Terms and Conditions
- ANNEX F - Non-staff Code of Conduct
- ANNEX G- GLO-Safeguarding_Children_and_Young_People_Global_Policy-Final-IO-Eng-Nov17
- ANNEX H- GLO-Anti-Fraud,_Anti-Bribery_and_Corruption_Global_Policy-Final-IO-Eng-Jun17
- ANNEX I – Case Studies

Tenderers are required to submit their proposal, inclusive of all required annexes, via email to ecaterina.rusu-ceapa@plan-international.org. Offers must be received by the deadline specified in the section '**2.3 Key Dates and Timelines.**'

The offer and all correspondence and documents related to the tender must be written in English.

Each Tenderer or member of consortium or sub-contractor may submit only one offer.

Unless stated otherwise, all communications from Bidders in relation to this tender, including Clarification Questions, must be directed to ecaterina.rusu-ceapa@plan-international.org and must include the IPT reference number: IPT FY24_01 Travel Management Service

2.3 Key Dates and Timelines

The following table outlines the key dates and timelines associated with this tender process. Plan International reserves the right to change these at any time as the tender progresses. To maintain transparency, fairness, and adequate time to prepare your offers,

Plan International will inform all interested Parties of any changes to these key dates and timelines simultaneously and in a timely fashion.

Activity	Deadline Date
Issue of Invitation to Tender	13/02/2024
Deadline for supplier submission of clarifications questions	20/02/2024
Deadline for Plan to respond to clarification questions	24/02/2024
Deadline for submission of offers	13/03/2024
Plan Review of Offers	13/03/2024 – 16/03/2024
Supplier presentations / interviews	19/03/2024 – 23/03/2024
Contract Award	26/03/2024 – 30/03/2024

2.4 Pricing

Bidders are required to complete the pricing schedule attached separately in '**Annex B – Pricing Schedule.**' All prices must be quoted in **EUR**, and **including** the Value Added Tax (VAT).

It is expected that prices will be fixed for the duration of the contract and quotes valid for a maximum period of 90 calendar days following the Closing Date of this tender. If for any reason you are unable to guarantee fixed pricing for the duration of the contract, any projected price increases should be clearly stated in your tender.

To ensure a fair and transparent process, Plan International will not be able to divulge budget information relating to this tender or associated Projects. It is expected that Bidders submit their best possible financial offer at the point of submission.

Please refer to '**Annex A - Specifications**' for full details of the requirement

Specification and Scope of Requirement

Please refer to '**Annex B - Statement of Requirements Travel Management Services**' for full details of the requirement.

3. Selection Criteria

Bids will be assessed against predetermined criteria which has been developed and agreed by the Tender Panel prior to launching this Tender process. The information gathered in '**ANNEX C - Tender Questions,**' '**ANNEX B - Pricing Schedule,** and any other requested documentation, will be used to evaluate and score each Bid against this set criteria. Please find further details in the below table:

	Criteria	Tenderers must demonstrate.....	Weight
Compliance	Tender Compliance and Completion	<ul style="list-style-type: none"> ▪ Satisfactory completion of all documentation requested with sufficient information, submitted no later than the Closing Date specified. ▪ Agreement to our mandatory policies as set out in 'Annex F- Non-Staff Code of Conduct.' ▪ Tax clearance certificate ▪ Proof of registration/legal existence ▪ Passed the anti-terrorism/money laundering check 	Pass/Fail. Bidders who do not meet these minimum requirements will not have their Bids further assessed.
Technical Proposal (65%)	Global Reach and Office Support Capability	<ul style="list-style-type: none"> • Demonstrated ability to provide services to all Plan International offices included in this tender as well as any office that will form part of this contract in future • Access to a wide range of global fares: flexible and discounted fares as well as local market fares relevant to Plan International countries. • Number of discounted fare agreements with relevant global airlines • Access to competitive hotel rates globally and relevant to Plan International locations. 	30%
	Service Delivery Capability	<ul style="list-style-type: none"> • Demonstrated ability to meet the requirements and service levels. • Ability to provide clear options for bookings & complex itineraries and ability to influence most cost-effective bookings. • Level of experience of the proposed team to support Plan International offices. 	20%
	Quality Assurance & Policy Compliance	Demonstrated ability to: <ul style="list-style-type: none"> • Ensure traveller information is accurate. • Ensure accurate travel data is captured for Management Information reports. • Support travel policy compliance 	10%
	Relevant Experience	<ul style="list-style-type: none"> • Previous experience working with INGOs • Customer References provided 	5%
Financial Proposal (30%)	Pricing Schedule	<ul style="list-style-type: none"> • Competitive transaction fee proposal with consideration of our organisation's values and mission which should be reflected in proposed pricing • Innovative approach to reduce travel spend for Plan International offices 	30%

Gender Responsive (5%)	Gender Sensitive Practices and Policies	<p>As part of our ongoing Gender Responsive Procurement Initiatives, Bidders will be allocated 5% of the overall score if they meet one or more of the following:</p> <ul style="list-style-type: none"> ▪ If headed up by a woman ▪ If supplier is a women-owned business: A legal entity in any field that is more than 51% owned, managed, and controlled by one or more women. ▪ If the % of women in management positions is over 35% ▪ If % of women workers is 55% or above 	5%
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4. Evaluation of offers

The Tender Panel will review all Bids to ensure they meet the minimum requirements listed under the 'Compliance' section in the above table. Following this, each Bid will be assigned a score on the basis of predetermined criteria and their associated weighted scorings.

The contract(s) will be awarded to the Bidder(s) who represent the best overall value for Plan International in terms of the evaluation criteria set out above. By participating in this tender, you acknowledge and understand that Plan reserves the right to:

- Decide not to award to any supplier
- Decide to award to one or more suppliers
- Decide to readvertise the opportunity
- Not necessarily accept the lowest cost offer

Notification of award of contract will be issued via e-mail.

5. Terms & Conditions

By submitting a Bid as part of this Tender process, you also acknowledge and understand that:

- Plan International will not be liable for any costs or expenses incurred in the preparation of your offer
- You or your company will undergo vetting checks against an Anti-Terrorism and Sanctions Database as part of due diligence protocols
- Plan International reserves the right to keep confidential the circumstances that have been considered for the selection of the offers
- Part of the evaluation process may include a presentation from the Bidder and a site visit by Plan International staff, where applicable and necessary
- Plan International reserves the right to alter the schedule of tender and contract awarding
- Plan International reserves the right to cancel this tender process at any time and not to award any contract
- Plan International reserves the right not to enter into or award a contract as a result of this invitation to tender
- Plan International does not bind itself to accept the lowest, or any offer

- Any attempt by the Bidder to obtain confidential information, enter into unlawful agreements with competitors or influence the evaluation committee or Plan International during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of its offers and may result in the termination of a current contract where applicable
- You accept in full and without restriction the conditions governing this tender as the sole basis of this competition, whatever its own conditions of sale may be, which you hereby waive
- You have examined carefully, understood and comply with all conditions, instructions, forms, provisions and specifications contained in this tender dossier. You are aware that failure to submit a tender containing all the information and documentation expressly required, within the deadline specified, may lead to the rejection of the tender at Plan International's discretion
- You are not aware of any corruption practice in relation to this competition. Should such a situation arise, we shall immediately inform Plan International in writing
- You declare that you are affected by no potential conflict of interest, and that you and our staff have no particular link with other Bidders or parties involved in this competition. Should such a situation arise during performance of the contract, you shall immediately inform Plan International in writing
- You accept Plan International's standard terms of payment which are **30 days** after the end of the month of receipt by Plan of a proper invoice or, if later, after acceptance of the Goods or Services in question by Plan International Ltd

6. Plan International's Ethical & Environmental Statement

- The organisation should establish environmental standards and good practices that follow the principles of ISO 14001 Environmental Management Systems, and in particular to ensure compliance with environmental legislation.
- The organisation should seek to set reduction targets in areas where the organisation's activities lead to significant environmental impacts.

7. Submission Checklist

Please note Plan International are unable to accept submissions which are accessible by an online link, for example SharePoint, Dropbox etc. Please submit the documents as email attachments.

Document	Form
ANNEX B - Pricing Schedule	Please complete with all requested information and return in both excel (editable) format and signed PDF version.
ANNEX C - Tender Questions	Please complete with all requested information and return in both excel

	(editable) format and signed PDF version.
ANNEX D - Supplier Questionnaire	Please complete with all requested information and return in word format.
ANNEX E - Plan International General Terms and Conditions	Please sign and date this document and return in PDF format.
ANNEX F - Non-staff Code of Conduct	Please sign and date this document and return in PDF format.
ANNEX G -GLO-Safeguarding_Children_and_Young_People_Global_Policy	Please sign and date this document and return in PDF format.
Annex H -GLO-Anti-Fraud,_Anti-Bribery_and_Corruption_Global_Policy	Please sign and date this document and return in PDF format.
ANNEX I – Case Studies	Please complete with all requested information and return in word format.

[Please provide a scanned copy]

Document	Rationale	Form
Other Documentation: <ul style="list-style-type: none"> • IATA certification (including any partners that will provide services) • ABTA Registration • Customer Safety policy • Safety related incidents (last 3 years) • Disaster Recovery & Business Continuity • Quality Monitoring Procedure 		
Contact details of three Referees (preferably INGO or UN customers)	Through contacting the Referees, Plan International can be assured on competency of Tenderer.	Services provided, Type of contract, period of performance, company name, contact name, telephone number, e-mail

Audited accounts for the last two years	The Tenderer demonstrates it has resources to perform the contractual obligation.	This should include both Profit and Loss account and Tenderer's Balance sheet
Company profile	The Tenderer provides information on its structure.	As necessary to provide Plan International with proper and complete information

ANNEX A – Specifications

Service Levels

Service	Supplier Commitments
Flight & Rail Bookings	<ul style="list-style-type: none"> ➤ Offer the most cost-effective fare options to bookers/travellers taking into consideration traveller requirements (e.g. flexibility of changing/cancelling fare, luggage requirements). ➤ Offer three different booking options in line with each office preference: ➤ Onsite processing, Offsite processing, Online booking tool ➤ Operate a 24/7 support service for all travellers to provide efficient support with any issues with journey or in emergency/crisis situations. ➤ Only offer fares with approved & insured airlines. ➤ Where possible, the supplier will offer quotes for both flight and rail fares. ➤ Manage individual air miles with bookings and ability to upgrade with points per traveller. ➤ A response to a flight group booking will be given within 24 hours.
Visa Processing	<ul style="list-style-type: none"> ➤ Advise booker on visa requirements for each flight/rail booking. ➤ Manage visa applications on behalf of the traveller. ➤ Service to include checking of documentation and advising on applicable fees. ➤ Provide booker/traveller with regular updates regarding visa applications. ➤ Ensure visas are obtained in line with travel dates.
Hotel Bookings	<ul style="list-style-type: none"> ➤ Offer the most cost-effective hotel options taking into consideration security aspect, distance from event and airport. ➤ Manage hotel bill back payments. ➤ Manage individual hotel loyalty programmes with bookings and manage any potential upgrade with points per traveller in line with travel policy.
Conference & Meetings	<ul style="list-style-type: none"> ➤ Source venue options for conferences & meetings based on most cost-effective option considering attendees' origin country. ➤ Provide booker with options within 48 hours of request. ➤ Negotiate contracts based on requirements including room rentals, catering and AV equipment.
Account Management	<ul style="list-style-type: none"> ➤ Supplier Account Manager to arrange quarterly review meetings with the Plan International Contract Manager. ➤ The Account Manager will send reports to the contract manager at least a day in advance of the review meeting. ➤ The Travel Account Manager will analyse Plan International's Management Information to identify savings opportunities, trends and "best practice" by: <ul style="list-style-type: none"> ○ Lead time Reports ○ Benchmarking Tools & Reports

	<ul style="list-style-type: none"> ○ Frequent Flyer Programmes & other loyalty programmes/schemes ○ Reports on transactions on-line v off-line to drive down fees. ➤ Provide a traveller tracking system with the ability to locate staff at all times. ➤ Provide at least 2 annual training sessions for Plan International staff that are responsible for booking travel. ➤ Send out quarterly surveys to travellers & bookers (content to be agreed & defined with Plan International). ➤ Report no results in quarterly meetings with identified action plans (if required). ➤ Clear feedback & complaints procedure and mechanism
Management Information & Reporting	<ul style="list-style-type: none"> ➤ The supplier will provide Plan International with annual travel data report for insurance purposes. ➤ The supplier will provide Plan International monthly reports either by direct access through portal or provided by the supplier. Reports to include: <ul style="list-style-type: none"> ○ Out of policy bookings (cabin class and booking period lead times) ○ Transaction fee charges ➤ The supplier will provide the following reports prior to the quarterly review meetings: <ul style="list-style-type: none"> ○ Spend by air travel, hotel, rail and visa ○ Air fare savings (calculations to be agreed with Plan International) ○ Airline spend ○ Out of policy bookings ○ Traveller & Booker satisfaction survey results ○ Online vs. offline transactions ○ Hotel rates savings (calculations to be agreed with Plan International) ○ Environmental impact
Reservations	<ul style="list-style-type: none"> ➤ Ninety-five per cent of all calls will be answered within six rings. ➤ All call enquiries will be processed at the time of the call unless the booker agrees to leave the information with the reservations consultant to process. In this case, the booker will receive a response within 2 hours if left with the reservations team. ➤ All quotes in response to emails will be sent within 2 hours of the enquiry, during office hours and out of hours. ➤ Provide a minimum of 3 quotes / options per booking request. ➤ Each quote to be transparent in pricing including the booking fee and any applicable fee for cancellation/changes to booking. ➤ No out of policy bookings to be made without confirmed approval. ➤ Supplier will capture a reason for travel for all bookings.
Ticket Delivery	<ul style="list-style-type: none"> ➤ All tickets ordered before 5pm will be issued the same day. Tickets ordered after 5pm will be issued and dispatched the following day. ➤ All tickets will be sent electronically.
24 hour support service	<ul style="list-style-type: none"> ➤ The supplier will provide a 24 hour/7 support service for all travellers to support with any issues during journey or in emergency/crisis situations. ➤ Supplier will ensure that all 24 hour support instances are resolved within 2 hours of call.
Payment & Invoicing	<ul style="list-style-type: none"> ➤ All invoices will be dispatched by email to the relevant cost centre on day of ticket issue. ➤ All invoices must display a Purchase Order or Account/Cost Centre no. relevant to the Plan International office making the booking. ➤ Invoices must be in local office currency. ➤ All invoices must include clear breakdown of cost of booking and any applicable fees (i.e. changes to booking). ➤ Guarantee a full transparency of pricing that can be audited quarterly. ➤ Manage VAT and NGO status locally for each office.
Refunds	<ul style="list-style-type: none"> ➤ All refunds will be logged and processed on day of receipt. ➤ Refunds will be credited to Plan International at the end of the month following the one in which they were processed. For refunds requiring airline referral, the Supplier will ensure Plan International is kept aware of the progress at all times.

Quality Control	<ul style="list-style-type: none"> ➤ The supplier will ensure the highest level of accuracy & consistency by cross checking Plan International traveller profiles in their system for authorisation, out of policy bookings, Purchase Order/Account numbers.
Complaints	<ul style="list-style-type: none"> ➤ The supplier will acknowledge and log a complaint within 24 hours of receipt. ➤ Complaints will be resolved within 7 days with regular updates provided.

Key Performance Indicators (KPIs)

KPI	Description	Supplier Service Requirements	KPI Mechanism	Supplier KPI Measure	KPI Target
Policy Compliance	Measure non-compliant bookings	Supplier will ensure that no out of policy bookings are made without relevant approval	Quarterly reports	% of bookings outside of policy with correct approval	100%
Contract Support	Ensure Plan International meets the contracted spend of own negotiated agreements with airlines	Supplier to manage bookings in line with Plan International airline agreement contracted spend	Quarterly airline spend reports	% of Plan International contracted spend with airlines is reached	100%
Traveller & Booker Satisfaction	Measure of service received by travellers & bookers	Supplier will seek feedback from travellers and report on in quarterly review meetings	Traveller & Booker survey results	Average traveller & booking satisfaction level	80% (4/5 rating)
Data Quality	Data quality defined as presence of data	Supplier will ensure that all required reporting data is captured from bookings	Quarterly reports	% presence of data in required fields for reports	100%
Quarterly Review Meetings	Measure of quarterly review meetings	Supplier will appoint an Account Manager responsible for arranging quarterly review meetings with contract manager at Plan International	On an annual basis	No. of review meetings arranged by account manager	4

The Supplier is responsible for ensuring full compliance at all times with the KPIs.

Any KPI failure in a given month should be highlighted with reasons for the failure and an action plan to resolve. If the issue is not resolved within a month then Plan International will have the right to give notice of termination.

