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## **UNITED NATIONS DEVELOPMENT PROGRAMME**

### **Minutes of UNDP Invitation to Bid LTA for TRAVEL MANAGEMENT SERVICES Pre-Bid Conference Meeting**

**Date: February 18, 2020**

**Time: 10:00 am**

**Location: UN House, 3A Chancery Lane, Port of Spain, Trinidad and Tobago**

**Attendees:**

1. Beverly Charles, Operations Manager- Chairperson, UNDP
2. Vanessa Chiddick, Procurement Associate, UNDP
3. Nikita Diaz, Operations Assistant, UNDP

**Travel Agencies:**

Travel Network Limited  
Trade Winds Travel  
Unlimited Travel  
Gee Geez Travel  
The Travel Centre  
Sellier's Travel

**Purpose:** To provide an overview of the administrative process for the Invitation to Bid (ITB), and clarify issues relating to the ITB to ensure that all proposed bidders submit the best proposals possible which would result in the award of contract.

**1. Welcome**

Beverly Charles, Operations Manager and Chair opened the meeting by welcoming the attendees and introducing the UNDP team. Bidders were requested to introduce themselves and the travel agencies they were representing.

She thanked everyone for their interest in the ITB and proceeded to provide a brief overview of the meeting agenda.

She stated that the purpose of the meeting was to allow potential bidders the opportunity to better understand UNDP's tender process and its requirements and to seek any clarifications required. It is hoped that the outcome of this meeting would be the submission of high quality bids from a number of travel agencies.

## **2. Overview of the ITB for Travel Management Services**

The Chair proceeded to discuss the details of the ITB. She explained that the 9 UN Agencies in Trinidad and Tobago have undertaken steps to harmonize common services. She stated that to achieve cost efficiency from economies of scale, the UN Agencies listed below have agreed to the implementation of a Long-Term Agreement (LTA) for Travel Management Services (TMS).

1. United Nations Development Programme (UNDP)
2. Food and Agriculture Organization (FAO)
3. United Nations Population Fund (UNFPA)
4. International Labor Organization (ILO)
5. United Nations Department of Safety and Security (UNDSS)
6. United Nations High Commissioner for Refugees (UNHCR)
7. UN Resident Coordinator System (UNRCS)
8. UNDP-GEF Small Grants Programme (UNOPS)
9. Pan American Health Organization/ World Health Organization (PAHO/WHO)

She emphasized that United Nations Development Programme (UNDP) is the lead agency on the procurement process, and will be responsible for the contractual arrangement with the travel agency/agencies. Without the LTA, UN's Procurement rules would require obtaining three (3) quotes every time travel was requested. However, with the existence of a LTA, while agencies are not obligated to use it, it allows UN Agencies to arrange travel without having to obtain three (3) quotes, thereby saving time and administrative costs. Thus, the LTA would allow agencies to manage travel functions more efficiently.

The Chair informed the attendees that the solicitation process used for establishing the LTA was an ITB, which has a mandatory pass/fail evaluation criteria. Further to this, the Chair indicated that the two main differences of this current ITB process is:

1. The eTendering process is being utilizing this year as opposed to the manual process which was used in previous years. She noted that the eTendering process is being used since it enhances integrity and transparency of the

procurement process and it allows for significant efficiency gains and cost savings for both the bidders and UNDP due to the automation of processes.

2. As part of this ITB, a Multiple Vendor LTA is being applied. As such, a maximum of two (2) vendors with the “lowest evaluated priced, technically responsive” bid will be awarded the LTA.

If the second lowest bid exceeds 20% tolerance level, then only one bidder will be awarded. The lowest priced, technically responsive bidder will be the primary TMS provider whereas, the second lowest priced, technically responsive bidder will be the secondary TMS provider.

### 3. **Presentation Administrative Process for the Invitation to Bid (ITB) Process**

Vanessa Chiddick, Procurement Associate presented on the administrative portion of the ITB process. An overview of the administrative process was highlighted and entails:

- ✓ Summary of the eTendering Process
- ✓ Required Documents to Establish Qualification of Bidders
- ✓ Structure of the Technical Proposal
- ✓ The Financial Proposal
- ✓ Evaluation Method
- ✓ Deadline for Submission
- ✓ Commencement & Expected duration of contract

#### 3.1.1 **Required Documents to Establish Qualification of Bidders**

The Procurement Associate discussed the required documents to establish the qualification of bidders. It was identified that the eTendering platform contains the returnable bidding forms which are retrievable as a word document by bidders. These forms are to be populated and submitted by the bidder as part of their technical proposals. The forms are:

- ✓ Form A: Bid Submission Form
- ✓ Form B: Bidder Information Form
- ✓ Form C: Joint Venture/Consortium/Association Information Form
- ✓ Form D: Qualification Form
- ✓ Form E: Format of Technical Bid

It was noted that all the required documents for the technical submission are identified on each of the form (Form A to Form E) and that the bidders should attach the documents in this format (e.g. all documents requested in Form A should be attached to Form A and so forth.)

- ✓ Company Profile
- ✓ Certification of Incorporation

- ✓ Tax Registration
- ✓ Organizational Commitment to Sustainability-for example internal company policy documents on women empowerment, renewable energies or membership of trade institutions promoting such issues
- ✓ Official Letter of Appointment as local representative, if Bidder is submitting a Bid in behalf of an entity located outside the country
- ✓ IATA Accreditation Certificate no later than 2017
- ✓ Quality Certificate
- ✓ Environmental Compliance Certificates
- ✓ Latest Audited Financial Statement (Income Statement and Balance Sheet) including Auditor's Report for the past three (3) years or; Letter from Banking Institution indicating access to Cash and Credit Facilities of no less than 6 figures in the mid to high range.
- ✓ CVs of managerial personnel and travel staff
- ✓ Statement of Satisfactory Performance from the Top 3 Clients in terms of Contract Value for the past 5 years
- ✓ Copies of licenses and membership certificates in global travel management associations (if any)
- ✓ Global Distribution System
- ✓ Maintains a global network/affiliates in major UN destinations.

### **3.1.2 Structure of the Technical Bid**

The Bidders must comply with all mandatory requirements and provide supporting documents in order to be considered for further evaluation.

- ✓ SECTION 1: Bidder's qualification, capacity and expertise
- ✓ SECTION 2: Scope of Supply, Technical Specifications, and Related Services
- ✓ SECTION 3: Management Structure and Key Personnel

### **3.1.3 Financial Proposal**

- ✓ The Procurement Associate informed the attendees that the total of Schedule A Economy Class (Fully Refundable) should be placed in Line Item 1 in the eTendering system. While the total for Schedule B: Business Class (Fully Refundable) should be placed in Line Item 2 in the eTendering system.
- ✓ All quotations for tickets should be sourced in the bidders ticketing system between 17<sup>th</sup> to the 21<sup>st</sup> February 2020.

- ✓ The Operations Manager emphasized the importance of entering a Management Fee value. If a value of zero is submitted, the bidder will automatically be disqualified.
- ✓ As it relates to the miscellaneous fees, the Operations Manager requested bidders for those services which are applicable or for which a cost will be charges, to provide a breakdown of their different fees in Table 2 Optional Services Requirement.

#### **3.1.4 Evaluation Method**

- ✓ All bids will be evaluated against the criteria stipulated in the solicitation documents- Section 5 of the ITB.
- ✓ The evaluation is based on a non-discretionary “pass/fail” method of all the mandatory document requested to access technical compliance/ responsive offers.
- ✓ The lowest-priced offer among the technically compliant/responsive offers will be selected.

#### **3.1.5 Deadline for Submission**

The Procurement Associate indicated that the deadline for submission of bids is March 6, 2020 at 4:00pm EST/EDT. New York based time system.

The proposal submission address is <https://etendering.partneragencies.org> using BU Code TTO10 and Event ID number 0000005348.

She further highlighted that the date and time which is visible on the main screen of event (on eTendering portal) will be final and prevail over any other closing time indicated elsewhere.

Bidders were encouraged to submit their bids a day prior or well before the closing time, rather than waiting to submit at the last minute. If technical issues are encountered, bidders are advised to contact [procurement.tt@undp.org](mailto:procurement.tt@undp.org) and [procurement.it@undp.org](mailto:procurement.it@undp.org) for assistance. Technical bids are not to be sent to that email but only issues regarding the uploading of proposal to eTendering website the <https://etendering.partneragencies.org>.

#### **3.1.6 Date, time and Venue for Opening of Bid**

Bidders will receive an automatic notification from the eTendering website once their bids are opened.

#### **3.1.7 Commencement & Expected Duration of Contract**

The expected date of commencement of the project is May 1st, 2020 and the maximum expected duration of the contract is three (3) years. One (1) year initial, possible extension of additional two (2) years upon performance review.

**4. Questions from Bidders on Administrative Process and/or Technical Questions**

**Question 1**

Is there an option to upload information and save for later?

**Answer 1**

Yes, you can upload information and save for later.

Detailed instruction on how to register and submit a bid in the UNDP eTendering online system can be found in the link provided below (which was also provided in the solicitation documents)

<http://www.undp.org/content/undp/en/home/operations/procurement/business/procurement-notice/resources/>

**Question 2**

What is the number of travel transactions undertaken by any UN Agency in a given year?

**Answer 2**

**Please see tables below:**

**Year 2017**

UN AGENCIES	AIR TRAVEL	
	# of trips	Total amount
PAHO	183	830,882.86
FAO	235	741,902.21
ILO	312	1,932,088.65
UN ECLAC	122	602,568.59
UNDP	255	1,549,450.67
UNFPA	17	92,670.88
UNHCR	14	35,669.28
<b>TOTAL</b>	<b>1138</b>	<b>5,785,233.14</b>

**Year 2018**

UN AGENCIES	AIR TRAVEL	
	# of trips	Total amount
PAHO	175	944,478.17

FAO	186	471,995.62
ILO	191	1,348,590.54
UN ECLAC	-	-
UNDP	184	1,120,657.80
UNFPA	12	51,251.76
UNHCR	72	394,518.32
TOTAL	820	4,331,492.21

**Year 2019**

UN AGENCIES	AIR TRAVEL	
	# of trips	Total amount
PAHO	277	1,451,044.81
FAO	201	246,794.96
ILO	290	1,789,614.42
UN ECLAC	-	-
UNDP	220	817,450.21
UNFPA	32	133,469.56
UNHCR	169	971,394.67
TOTAL	1189	5,409,768.63

**Question 3**

Will the travel agency be held accountable to maintain the quoted ticketing cost under the circumstance where the deadline for purchase is missed by the UN Agency?

**Answer 3**

If a UN Agency misses the deadline for approval of a ticket at the quoted cost as indicated by the travel agency as a result of the UN Agency's untimely approval, the travel agency cannot be held accountable.

**Question 4**

Is there a need for specialized reporting and can a fee be charge by the Travel Agency for generating multiple types of specialised reports?

**Answer 4**

The reporting format requested is the same for all UN agencies.

**Question 5**

Should invoices and bills be made separately for each agency?

**Answer 5**

Yes, each agency is responsible for covering its own cost; bill each agency separately.

**Question 6**

How does the UN exchange rate relate to the costing of the ticket, given that the airline provides an airline rate?

**Answer 6**

Please use the airline exchange rates as evidence by the ticketing receipt.

**Question 7**

Is there a time-limit for when the TMS provider is expected to receive payment?

**Answer 7**

Billing should be on 'credit' basis of Net 30 days. Payments will be made 30 days upon receipt of invoice. In the case of UNDP pays the travel agency immediately upon approval of a ticket via UNDP's Corporate Credit Card. However other UN Agencies may not utilise credit card payments.

**Question 8**

As it relates to preferred seating, should an additional cost be added unto the airline cost?

**Answer 8**

Only if the Travel Agency charges a specific fee when preferred seating is requested. In this case, additional miscellaneous cost should be reflected in Table 2: Optional Services Requirement in the Financial Bid section of the ITB. However, if you are simple referring to the additional cost to the traveller of acquiring a preferred seat, then this cost will simply form part of the travel fare.

**Question 9**

Is it mandatory to provide the exchange rate of the fare being calculated?

**Answer 9**



Prices should be documented/supported with the TT\$ quotations for tickets and the exchange rate sent through the reservation system used by the Travel Agency.

**Question 10**

Given that TMS hours are from 8am-5:30pm and there is an expectation of 24/7 services, does the UNDP expect an immediate response to any email at any given time after working hours?

**Answer 10**

In cases of emergencies, the travel agency will be required to provide the name and contact information of their 24/7 focal point. UN Agencies will indicate to the travel agency any urgent requests via email and a follow up telephone conversation. The need for 24/7 services is not a frequent occurrence but it will happen on occasions and the travel agency will be expected to respond in a timely manner.

**Question 11**

Can a Travel Agency present their management fee as a percentage fee?

**Answer 11**

No, the management fee should be represented as a flat rate. This would assist in the comparison of bids.

**Question 12**

After documents are printed, can bidders submit a PDF of all the Forms within a single PDF document?

**Answer 12**

No, the system will not accept files exceeding 45mb. If you are uploading a large number of files (ex. 15 or more), please zip the files into a ZIP folder and upload the folder instead of each file individually. You can upload several ZIP folders, but if you do this, please note that the total size of each ZIP folder uploaded cannot exceed 45MB.

**5. Close of Meeting**

The Chair thanked all participants for attending and encouraged all bidders to submit their proposals on time. She indicated that the deadline for receiving questions from bidders was 4:00pm 28th February 2020 and further advised that the minutes of the clarification meeting would be posted on the eTendering website. <https://etendering.partneragencies.org/>



PRE BID CONFERENCE

LONG TERM AGREEMENT (LTA) FOR PROVISION OF TRAVEL  
MANAGEMENT SERVICES

18 February 2020 at 10:00am

Sign in sheet

<u>Company</u>	<u>NAME</u>	<u>TELEPHONE</u>	<u>EMAIL</u>
Travel Network Inc Ltd	C. Hill E. Oles	623-3657 623-3651	liz.travel@network.com
TRADE WINDS TRAVEL	A. Phay L. Sookram	623-7531 623-7531	trade@windstravel.com
Unlimited TVL	A. Gordon	735-1551	utt@td.02@gmail.com
GEE GEEZ TRAVEL	PATRICIA DIBEE	652 4142	gee.geez@travel.com
GEE GEEZ TRAVEL	SALIMA HOSEIN	649 3939	
The Travel Centre	Catherine de Gannes-Martin	678-0157	catherine@the-travel-centre.com
SELLIER'S TRAVEL	DAVID SELLIER	628-8258	DAVID@SELLIERSTRAVEL.COM