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**Annexure A2**

**DESKTOP EVALUATION TECHNICAL SCORECARD**

**AND COMPLIANCE CHECKLIST**

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First Edition  
January 2017

## ANNEXURE A2: DESKTOP EVALUATION TECHNICAL SCORECARD AND COMPLIANCE CHECKLIST

The form must be submitted in File 1 (Technical file), [Exhibit 2](#)



*The tendering institution may add or remove any evaluation criteria they may deem necessary. Keep in mind that it must be measurable and state clearly what is required to substantiate the requirement.*

*The tendering institution may allocate the weighting of the requirements at their own discretion. It must add up to 100 or it must be converted to a score out of a 100 if the weighting adds up to more than 100. E.g. if the weighting adds up to 250 and the bidder scores 180 out of 250, then the score is 72  $(180/250) \times 100 = 72$*

*The tendering institution may also decide whether to include the Presentation as part of the functionality. If not, then it must be status as such.*

### EXAMPLE OF HOW THE BIDDER MUST COMPLETE THE COMPLIANCE CHECKLIST:

Section No	Technical Criteria	Reference page in Proposal	Comments
1.2	<b>Experience of the bidder</b>	Exhibit 2: Page 9 to 12	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.
2.1	<b>Manage all reservations and bookings</b>	Exhibit 2: Page 13 to 15	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.
2.2	<b>Manage all refunds and non-refundable airline-tickets</b>	Exhibit 2: Page 17 to 20	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.

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**EXAMPLE OF A RATING SCALE THAT BEC MEMBERS MAY USE**

Rating	Definition	Score
Excellent	<b>Exceeds</b> the requirement. Exceptional demonstration by the supplier of the relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services. Response identifies factors that will offer potential added value, with supporting evidence.	5
Good	<b>Satisfies</b> the requirement with <b>minor additional benefits</b> . Above average demonstration by the supplier of the relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services. Response identifies factors that will offer potential added value, with supporting evidence.	4
Acceptable	<b>Satisfies</b> the requirement. Demonstration by the supplier of the relevant ability, understanding, experience, skills, resource, and quality measures required to provide the goods / services, with supporting evidence.	3
Minor Reservations	Satisfies the requirement with <b>minor reservations</b> . Some minor reservations of the supplier's relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services, with little or no supporting evidence.	2
Serious Reservations	Satisfies the requirement with <b>major reservations</b> . Considerable reservations of the supplier's relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services, with little or no supporting evidence.	1
Unacceptable	<b>Does not meet the requirement</b> . Does not comply and/or insufficient information provided to demonstrate that the supplier has the ability, understanding, experience, skills, resource & quality measures required to provide the goods / services, with little or no supporting evidence.	0

**The Bidders will be evaluated according to the technical evaluation criteria in the scorecard below.**

**Bidders must indicate their ability to do the following and to substantiate as required with supporting documentation.**

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
<i>TO BE COMPLETED BY THE TENDERING INSTITUTION</i>				<i>TO BE COMPLETED BY THE BIDDER</i>	
<b>DESKTOP EVALUATION</b>		<b>80</b>			
<b>1</b>	<b>GENERAL</b>	<i>Insert total weight of section 1</i>	SECTION 15.3.2		
1.1	Provide a detailed transition plan for implementing the service without service interruptions and engage with the incumbent service provider to ensure a smooth transition.	<i>Insert weight</i>	Section 15.3.1 (j)		
1.2	Provide the reference letters from at least three (3) contactable existing/recent clients (within past 3 years) which are of a similar size to [Institution name] whom we may contact for references. The letter must include: company name, contact name, address, phone number, and duration of contract, value of the travel expenditure, a brief description of the services that you provided and the level of satisfaction.	<i>Insert weight</i>	Section 15.3.1 (k)		

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1.3	<p>ASATA (Association of South African Travel Agents) Membership. Provide proof of such membership.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p><i>Note: The requirement for a TMC to be an <b>ASATA member</b> (Association of South African Travel Agents) is solely at the discretion of the tendering institution. Be mindful of bidders who will be excluded. ASATA membership is an added advantage and may be included as a weighted evaluation criteria. Remove this criteria if it is not a requirement for the Tendering Institution.</i></p> </div>	Insert weight	Section 15.3.1 (l)		

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2	RESERVATIONS	Insert total weight of section 2	SECTION 15.3.2 TO 15.3.6		
2.1	<p><b>Manage all reservations/ bookings.</b></p> <p>Describe how all travel reservations/ bookings are handled e.g. hotel (accommodation); car rental; flights etc.</p> <p>This will include, without limitation, an example of a detailed complex itinerary confirmation that includes air, car, hotel, passport requirement, confirmation numbers and additional proof of competency.</p>	Insert weight	<p>Section 15.3.2</p> <p>Section 15.3.3</p> <p>Section 15.3.4</p> <p>Section 15.3.5</p>		
2.2	<p><b>Manage group bookings.</b></p> <p>Describe your capabilities for handling group bookings (e.g. for meetings, conferences, events etc.). Please specify if these bookings would be done by the TMC or outsourced.</p>	Insert weight	Section 15.3.2 (i)		
2.3	<p><b>Directly negotiated rates</b></p> <p>Negotiated airline fares, accommodation establishment rates, car rental rates, etc, that are negotiated directly or established by</p>	Insert weight	Section 15.3.2 (q)		

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	<p>National Treasury or by [Institution name] are <b>non-commissionable</b>, where commissions are earned for [Institution name] bookings, all these commissions should be returned to [Institution name] on a quarterly basis.</p> <p>Describe how these specific rates will be secured. Describe any automated tools that will be used to assist with maintenance and processing of the said negotiated rates.</p>				
2.4	<p><b>Manage airline reservations.</b></p> <p>Describe in detail the process of booking the most cost-effective and practical routing for the traveller.</p> <p>This will include, without limitation, the refund process and how you manage the unused non-refundable airline tickets, your ability to secure special airline services for traveller(s) including preferred seating, waitlist clearance, special meals, travellers with disabilities, etc.</p>	Insert weight	Section 15.3.3		
2.5	<p><b>After-hours and emergency services</b></p> <p>The bidder must have capacity to provide reliable and consistent after hours and</p>	Insert weight	Section 15.3.6		

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<i>TO BE COMPLETED BY THE TENDERING INSTITUTION</i>				<i>TO BE COMPLETED BY THE BIDDER</i>	
	<p>emergency support to traveller(s).</p> <p>Please provide details/ Standard Operating Procedure of your after-hour support e.g.</p> <ul style="list-style-type: none"> <li>- how it is accessed by Travellers,</li> <li>- where it is located, centralized/ regionalised, in-country (owned)/ outsourced etc.</li> <li>- is it available 24/7/365</li> <li>- Reminders to [Institution name] to process purchase orders within 24 hours to reduce queries on invoices</li> </ul>				
<b>3</b>	<b>COMMUNICATION</b>	<b>Insert total weight of section 3</b>	<b>SECTION 15.4</b>		
3.1	<p>Describe how you will ensure that travel bookers are informed of the travel booking processes.</p> <p>Describe your communication process where the traveller, travel co-ordinator/booker and travel management company will be linked in one smooth continuous workflow.</p>	<b>Insert weight</b>	Section 15.4		



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4	FINANCIAL MANAGEMENT	Insert total weight of section 4	SECTION 15.5		
4.1	<p>Describe how you will implement the negotiated rates and maximum allowable rates established either by the [Institution name] or the National Treasury.</p> <p>Describe how you will manage the 30-day bill-back account facility.</p> <p>Describe how pre-payments will be handled where it is required for smaller Bed &amp; Breakfast /Guest House facilities.</p> <p>Describe how invoicing will be handled, including the process of rectifying discrepancies between purchase orders and invoices, supporting documentation, reconciliation of transactions and the timely provision of invoices to [Institution name]</p> <p>Please describe credit card reconciliation process, timing and deliverables (if applicable).</p>	Insert weight	Section 15.5		

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5	TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING	Insert total weight of section 5	SECTION 15.6		
5.1	<p>Describe the proposed booking system e.g. Global Distribution System (GDS), Online Booking Tool (OBT) or Self-Booking tool (SBT).</p> <p>Describe how travel consultants access and book web airfares i.e. non-GDS inventories (low cost carriers/ consolidators), and hotel web rates.</p> <p>Describe how you will manage data and management information such as traveller profiles, tracking of savings and missed savings, tracking of unused airline tickets, cancellation, traveller behaviour, transaction level data, etc. (refer to the detail in <b>Section 15.6.6</b>)</p> <p>Give actual examples of standard reports that you currently have available. Give an indication if reports can be customised.</p> <p>Provide a description of all technology and reporting products proposed for [Institution name].</p> <p>Can the TMC comply with the [Institution</p>	Insert weight	Section 15.6		

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	<p><a href="#">name</a>'s monthly reporting requirement as prescribed by National Treasury? See Monthly Reporting Template prescribed by National Treasury Instruction No 3 of 2016/17.</p> <p>Describe the compatibility of your online solution to fully integrate into <a href="#">[Institution name]</a>'s ERP. Indicate the turnaround time to complete this process and a breakdown of the expected cost that will be associated with it (in case <a href="#">[Institution name]</a> decide to integrate)</p>				
6	ACCOUNT MANAGEMENT	Insert total weight of section 6	SECTION 15.7		
6.1	<p>Provide the proposed Account Management structure / organogram.</p> <p>Describe what quality control procedures/ processes you have in place to ensure that your clients receive consistent quality service.</p> <p>Describe how queries, requests, changes and cancellations will be handled. What is your mitigation and issue resolution process? Please provide a detailed response indicating performance standards with respect to resolving</p>	Insert weight	<p>Section 15.7.1 and 15.7.2</p> <p>Section 15.7.3</p> <p>Section 15.7.4</p>		

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	<p>service issues. Complaint handling procedure must be submitted.</p> <p>What is in place to ensure that the [Institution name]'s travel Policy is enforced.</p> <p>How will you manage the service levels in the SLA and how will you go about doing customer satisfaction surveys?</p> <p>Indicate what workshops/training will be provided to Travellers and /or Travel Bookers.</p>		<p>Section 15.7.5</p> <p>Section 15.7.6</p> <p>Section 15.7.7</p>		
<b>7</b>	<b>VALUE ADDED SERVICES</b>	<b>Insert total weight of section 7</b>	<b>SECTION 15.8</b>		
7.1	Please provide information on any value-added services your company can offer.	Insert weight	Section 15.8		
<b>8</b>	<b>COST MANAGEMENT</b>	<b>Insert total weight of section 8</b>	<b>SECTION 15.9</b>		
8.1	Describe your detailed strategic cost savings plan for the contract duration. What items do you target for maximum cost savings results?	Insert weight	Section 15.9		

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	Describe how you will assist the [Institution name] to realise cost savings on annual travel spend.				
9	QUARTERLY AND ANNUAL TRAVEL REVIEWS	Insert total weight of section 9	SECTION 15.10		
9.1	Provide a sample of a Quarterly and Annual review used for performance management during the life cycle of the contract.	Insert weight	Section 15.10		
10	OFFICE MANAGEMENT	Insert total weight of section 10	SECTION 15.11		
10.1	Provide an overview of your back-office processes detailing the degree of automation for air tickets workflow, ground arrangements and bill back workflow.  Describe roles and responsibilities of assigned staff. Please provide the management	Insert weight	Section 15.11		

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	<p>hierarchy.</p> <p>Describe type of training provided to travel agency personnel</p> <p>Describe the forecasting system employed to staff operations in response to volume changes owing to conferences, project-related volumes, etc.</p>				
<b>PRESENTATION</b>		<b>20</b>			
	<p><b>Part A:</b> presentation must not exceed <b>90 minutes</b></p> <ul style="list-style-type: none"> <li>- Summary of the proposal</li> <li>- Value added Services - Provide information on any value-added services that can be offered to <b>[Institution name]</b>.</li> <li>- Cost saving strategy - Describe and provide examples of cost savings initiatives implemented and achieved at previous</li> </ul>	Insert weight			

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	clients. Indicate what items were targeted for maximum cost savings results <ul style="list-style-type: none"> <li>- How the TMC will assist with improving traveller behaviour.</li> <li>- Reference checks</li> <li>- Q&amp;A on technical submission.</li> </ul>				

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**BIDDER DECLARATION (Section 22)**

The bidder hereby declare the following:

We confirm that \_\_\_\_\_ (Bidder's Name) will: –

- a. Act honestly, fairly, and with due skill, care and diligence, in the interests of [Institution name];
- b. Employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- c. Act with circumspection and treat [Institution name] fairly in a situation of conflicting interests;
- d. Comply with all applicable statutory or common law requirements applicable to the conduct of business;
- e. Make adequate disclosures of relevant material information including disclosures of actual or potential own interests, in relation to dealings with [Institution name];
- f. Avoid fraudulent and misleading advertising, canvassing and marketing;
- g. Conduct business activities with transparency and consistently uphold the interests and needs of [Institution name] as a client before any other consideration; and
- h. Ensure that any information acquired by the bidder(s) from [Institution name] will not be used or disclosed unless the written consent of the client has been obtained to do so.

Signature\_\_\_\_\_

Date\_\_\_\_\_

Print Name of Signatory:\_\_\_\_\_

Designation: \_\_\_\_\_

FOR AND ON BEHALF OF: \_\_\_\_\_(Bidding Company's Name)