



Annexure A2

DESKTOP EVALUATION TECHNICAL SCORECARD AND COMPLIANCE CHECKLIST

ANNEXURE A2: DESKTOP EVALUATION TECHNICAL SCORECARD AND COMPLIANCE CHECKLIST

The form must be submitted in File 1 (Technical file),

RATING SCALE THAT BEC MEMBERS MAY USE

Rating	Definition	Score
Excellent	Exceeds 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	Satisfies the requirement with minor additional benefits . 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	Satisfies 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 minor reservations . 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 major reservations . 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	Does not meet the requirement . Does not comply and/or insufficient information provided to demonstrate that the supplier has the ability, understanding, experience,	0

	skills, resource & quality measures required to provide the goods / services, with little or no supporting evidence.	
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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.

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TO BE COMPLETED BY THE TENDERING INSTITUTION				TO BE COMPLETED BY THE BIDDER	
DESKTOP EVALUATION		100			
1	GENERAL	10	SECTION 13.3.1		
1.1	<p>Company track record (References)</p> <p>Number of companies refers to the number of companies/organizations where the Bidder has provided Travel Management Services similar to what is being sought by Productivity SA.</p> <p>Bidders are required to furnish contactable references where Travel Management Services have successfully been implemented:</p> <p>The SIGNED reference letters must include:</p> <ul style="list-style-type: none"> • client's letterhead, • contact name, 	5	Section 13.3.1 (m)		

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	<ul style="list-style-type: none"> • address, • phone number, and • contract start date and contract end date, value of the travel expenditure, a brief description of the services that you provided and the level of satisfaction. <p>Take notice that:</p> <ul style="list-style-type: none"> • less than three (3) reference letters will result in a zero marks. • Three (3) letters will be allocated three (3) points a) Non-submission/ irrelevant letter – 0 points d) 3 reference letters – 3 points e) 4 reference letters – 4 points f) 5 reference letters or more –5 points •one (1) additional point will be allocated to a maximum of five (5) points for every reference 				

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	<p>letter more than three (3).</p> <p>NB: Failure of the Company track record (References) to address the above bullet points, the reference letters will be invalid and will result in the bidder scoring zero (0)points.</p>				
	<p>Provide a detailed transition plan for implementing the service without service interruptions and engage with the incumbent service provider to ensure a smooth transition. Such transitional plan must detail the following subjects, and there will not be partial points awarded for submissions that do not have all the requirements submitted:</p> <ul style="list-style-type: none"> • training travellers and super users • obtaining the necessary software licensing and electronic hardware • engagement with and takeover from the former supplier • detailed timelines and actions to be 	5	Section 13.3.1 (p) (vi)		

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	<p>taken</p> <p>NB: Failure to detail all the above bullet points in the transitional plan will result in the bidder scoring zero (0)points.</p>				

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2	RESERVATIONS	25	SECTION 13.3.2 TO 13.3.6		
2.1	<p>Manage all reservations/ bookings.</p> <p>Describe how all travel reservations/ bookings are handled e.g. accommodation; car rental; flights, etc.</p> <p>This will include, without limitation, an example of a detailed complex itinerary confirmation that includes air ,car rental, accommodation, shuttle transfers, and additional proof of competency.</p>	5	<p>Section 13.3.2</p> <p>Section 13.3.3</p> <p>Section 13.3.4</p> <p>Section 13.3.5</p>		

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	NB: Failure to detail ALL the above bullet points result in the bidder scoring zero (0)points				
2.2	<p>Manage group bookings.</p> <p>Describe your capabilities for handling group bookings (e.g. for meetings (2 Points), conferences (3 points). Please specify if these bookings would be done by the TMC or outsourced.</p> <p>Take note:</p> <ul style="list-style-type: none"> •Two (2) points will be awarded for bidders who can show their capability of making successful group bookings in-house for 400 or more delegates. <p>Three (3) points will be awarded for bidders that show their capability in booking successful conferences for</p>	5	Section 13.3.2 (i)		

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	<p>400 or more delegates</p> <p>NB: Failure to address ALL the above bullet points will result in the bidder scoring zero (0)points. Please note that you must address both bookings for meetings and conferences respectively, failure to do so will result in the bidder scoring zero (0)</p>				
2.3	<p>Directly negotiated rates</p> <p>Negotiated airline fares, accommodation establishment rates, car rental rates, etc, that are negotiated directly or established by National Treasury or by Productivity SA are non-commissionable, where commissions are earned for Productivity SA bookings. Provide how all these commissions should be returned to Productivity SA on a quarterly basis.</p> <ul style="list-style-type: none"> Describe how these specific rates will be secured(2points). Describe any automated tools that will be used to assist with maintenance and processing of the said negotiated rates. (1 points). Describe the way of reporting on and paying over of any commission earned as 	5	Section 13.3.2 (q)		

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	<p>a result of Productivity SA bookings (2 points).</p> <p>NB: Failure to address all the above bullet points will result in the bidder scoring zero (0) points.</p>				
2.4	<p>Manage airline reservations.</p> <p>Describe in detail the process of booking the most cost-effective and practical routing for the traveller.</p> <ul style="list-style-type: none"> This will include, without limitation, the refund process and how TMC will manage the unused non-refundable airline tickets (1 point), your ability to secure special airline services for traveller(s) including preferred seating (1 point), waitlist clearance (1 point), special meals (1 point), travellers with disabilities (1 point). <p>NB: Failure to address all the above bullet points will result in the bidder scoring zero (0) points.</p>	5	Section 13.3.3		
2.5	<p>After-hours and emergency services</p> <p>The bidder must have capacity to provide reliable and consistent after hours and</p>	5	Section 13.3.6		

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	<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"> how it is accessed by Travellers (1 point), where it is located, centralized/ regionalised, in-country (owned)/ outsourced (2 points), is it available 24/7/365 (1 point), Reminders to Cross Boarder Road Transport Agency (C-BRTA) to process purchase orders within 24 hours to reduce queries on invoices (1 point). <p>NB: Failure to address all the above bullet points will result in the bidder scoring zero (0)points.</p>				
3	COMMUNICATION	5	SECTION 13.4		
3.1	<p>Describe how you will ensure that travel bookers are informed of the travel booking processes.</p> <ul style="list-style-type: none"> Describe your communication process where the traveller, travel co-ordinator/booker and travel management company will be linked in one smooth 	5	Section 13.4		

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	<p>continuous workflow. (3 points).</p> <p>The TMC must demonstrate its capability as part of the communication process to include:</p> <ul style="list-style-type: none"> SMS, WhatsApp, and emails notifications of entire booking (1 point), vouchers for car rentals, accommodation, shuttle and e-tickets for flights (1point) <p>NB: Failure to all address the above bullet points will result in the bidder scoring zero (0) points.</p>				
4	FINANCIAL MANAGEMENT	5	SECTION 13.5		
4.1	<p>Describe how you will implement the negotiated rates and maximum allowable rates established either by the Productivity SA or the National Treasury</p> <ul style="list-style-type: none"> Describe how pre-payments will be handled where it is required for smaller Bed & Breakfast /Guest House facilities. (1 point) 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 Productivity 	5	Section 13.5		

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	<p>SA. (2 points)</p> <ul style="list-style-type: none"> reconciliation of transactions and the timely provision of invoices to Productivity SA (1 point). Please describe the credit card/travel lodge card reconciliation process, timing and deliverables (1 point). <p>NB: Failure to all address the above bullet points will result in the bidder scoring zero (0) points</p>				
5	TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING	10	SECTION 13.6		
5.1	<p>Bidders are required to submit an example of a Management Information System Report (MIS) which report must cover the items below:</p> <ul style="list-style-type: none"> Supplier list for accommodation, air fare, shuttle, venues and conferences (1 point) Top 20 Travelers (amounts and items of expenditure). (1 point) Top 5 public entities (amounts and items of expenditure) (1 point) 	10	Section 13.6		

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	<ul style="list-style-type: none"> Executive summary dashboard (1 point) Service fees (1 point) After hours report (1 point) Monthly savings report (1 point) Conferencing report (1 point) Booking time lines (1 point) open ticket report (1 point) <p>NB: Failure to address all the above bullet points will result in the bidder scoring zero (0)points</p>				
6	ACCOUNT MANAGEMENT	5	SECTION 13.7		
6.1	<p>Provide the proposed Account Management structure / organogram.</p> <p>Provide a SOP document which reflects:</p> <ul style="list-style-type: none"> quality control procedures/ processes you 	5	<p>Section 13.7.1 and 13.7.2</p> <p>Section 13.7.3</p>		

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	<p>have in place to ensure that your clients receive consistent quality service. (1 Point)</p> <ul style="list-style-type: none"> 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 service issues. Complaint handling procedure must be submitted. (1 Point) What is in place to ensure that the Productivity SA's travel Policy is enforced in line with National Treasury travel framework . (1 Point) How will you manage the service levels in the SLA and how will you go about doing customer satisfaction surveys? (2 Points) <p>NB: Failure to address all the above bullet points will result in the bidder scoring zero (0)points</p>		<p>Section 13.7.4</p> <p>Section 13.7.5</p> <p>Section 13.7.6</p> <p>Section 13.7.7</p>		
7	VALUE ADDED SERVICES	5	SECTION 13.8		
7.1	Please provide information on the value-added	5	Section 13.8.1		

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	<p>services your company can offer. The value added services should be at least all the below:</p> <ul style="list-style-type: none"> • Health warnings; • Weather forecasts; • Visa Information; • Information including the cost of public transport; • Rules and procedures of the airports; • Business etiquette specific to the country; • Airline baggage policy; and • Supplier updates • Travel alerts • Supplier Updates <p>NB: Failure to detail all the above bullet points will result in the bidder scoring zero (0)points</p>				

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8	COST MANAGEMENT	5	SECTION 13.9		
8.1	<p>Describe your detailed strategic cost savings plan for the contract duration. What items do you target for maximum cost savings results? (3 Points)</p> <p>Describe how you will assist the Productivity SA to realise cost savings on annual travel spend. (2 Points)</p> <p>NB: Failure to detail all the above bullet points will result in the bidder scoring zero (0)points</p>	5	Section 13.9		
9	QUARTERLY AND ANNUAL TRAVEL REVIEWS	5	SECTION 13.10		
9.1	<p>Provide a sample of a Quarterly and Annual review where the Bidder has provided Travel Management Services similar to what is being sought by Productivity SA. (2 Point)</p> <p>Provide a sample of Annual review used for performance management during the life cycle</p>	5	Section 13.10		

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	<p>of the contract where the Bidder has provided Travel Management Services similar to what is being sought by Productivity SA. (3 points)</p> <p>NB: Failure to detail all the above bullet points will result in the bidder scoring zero (0)points</p>				
10	OFFICE MANAGEMENT	5	SECTION 13.11		
10.1	<p>Submit the SOP for invoicing to cover an overview of your back-office processes detailing the degree of automation for air tickets workflow, ground arrangements and bill back workflow (2 Points)</p> <p>Describe roles and responsibilities of assigned staff and travel agency personnel of the bidder that will be allocated to Productivity SA. Please provide the management hierarchy. (2 Points)</p> <p>Describe type of training provided to travel agency personnel where the travel agency personnel of the bidder has provided Travel Management Services similar to what is being</p>	5	Section 13.11		

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	sought by Productivity SA. (1 Point) NB: Failure to detail all the above bullet points will result in the bidder scoring zero (0)points				
PRESENTATION		20			
	<p>Part A: presentation must not exceed 90 minutes (10 points)</p> <ul style="list-style-type: none"> - Summary of the proposal - Value added Services - Provide information on any value-added services that can be offered to Productivity SA. - Cost saving strategy - Describe and provide examples of cost savings initiatives implemented and achieved at previous clients. Indicate what items were targeted for maximum cost savings results - How the TMC will assist with improving traveller behaviour. - Q&A on technical submission. 	20			

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	<p>Part B:</p> <p>Online Tool Capabilities - Demonstrate how the system will manage the following:</p> <ul style="list-style-type: none"> - How the proposed web based online tool would be compliant to National Treasury cost containment measures and - How the proposed web-based online tools would be compliant to Productivity SA Travel Policy (10 Points). <p>Bidder(s) are required to achieve minimum threshold of 10 points out of 20 points.</p> <p>NB: If the presentation does not address all of the bullet points in each of the sub categories in Part A and Part B respectively, this will result in the bidder scoring zero (0) points for entire Presentation criteria. Both Part A and Part B must be addressed completely.</p>				

Bidders who met the minimum technical threshold of **75 points** will proceed to the third phase being price and SPECIFIC GOALS level of contribution.

Allocation of points for the evaluation process		
Technical evaluation	Minimum threshold 75	Total points out of a 100
Price	80	100
SPECIFIC GOALS	20	

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 Productivity SA;
- b. Employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- c. Act with circumspection and treat Productivity SA 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 Productivity SA;
- f. Avoid fraudulent and misleading advertising, canvassing and marketing;
- g. Conduct business activities with transparency and consistently uphold the interests and needs of Productivity SA as a client before any other consideration; and
- h. Ensure that any information acquired by the bidder(s) from Productivity SA will not be used or disclosed unless the written consent of the client has been obtained to do so.
- i. I certify that the information furnished is correct. I accept that the state may reject the bid or act against me in terms of paragraph 6 of PFMA SCM Instruction 03 of 2021/22 on preventing and combating abuse in the supply chain management system should this declaration prove to be false.

Signature_____

Date_____

Print Name of Signatory:_____

Designation: _____

FOR AND ON BEHALF OF: _____(*Bidding Company's Name*)