



**Annexure A2**

**DESKTOP EVALUATION TECHNICAL SCORECARD**

**AND COMPLIANCE CHECKLIST**

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First Edition  
December 2016

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

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



*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 to complete the compliance checklist:

Section No	Technical Criteria	Compliant	Partially Compliant	Non-Compliant	Reference page in Proposal	Comments
1.2	Experience of the bidder	Yes			Page 9 to 12 - exhibit 2	
1.2	Manage all reservations and bookings		Yes		Page 13 to 15 - exhibit 4	Bidder to state reason for partial compliance
1.3	Manage all refunds and non-refundable airline-tickets			No	Page 17 to 20 - exhibit 5	Bidder to state reason for non-compliance

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	Compliant	Partially Compliant	Non-Compliant	Reference Page in Bidders Proposal	Comments
<b>DESKTOP EVALUATION</b>		<b>80</b>						
<b>1</b>	<b>GENERAL</b>	<b>10</b>	<b>SECTION 15.3.2</b>					
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.	5	Section 11.3.1 (i)					
1.2	Provide the testimonials/reference letters from at least three (3) contactable existing/recent clients (within past 3 years) which are of a similar size to RTMC 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.	5	Section 11.3.1 (j)					

#	Technical Evaluation Criterion	Weight	Reference in Bid Document	Compliant	Partially Compliant	Non-Compliant	Reference Page in Bidders Proposal	Comments
2	RESERVATIONS	5	SECTION 11.3.2 TO 11.3.5.6					
2.1	<p><b>Manage all reservations/ bookings.</b></p> <p>Describe how all travel reservations/ bookings are handled e.g. hotel (accommodation); rental car; 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>	1	<p>Section 11.3.2</p> <p>Section 11.3.4</p> <p>Section 11.3.5</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>	1	Section 11.3.2 (h)					
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 National Treasury or by RTMC are <b>non-</b></p>	1	Section 11.3.2 (p)					

#	Technical Evaluation Criterion	Weight	Reference in Bid Document	Compliant	Partially Compliant	Non-Compliant	Reference Page in Bidders Proposal	Comments
	<p><b>commissionable</b>, where commissions are earned for RTMC bookings all these commissions should be returned to RTMC on a monthly 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>	1	Section 11.3.3					
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 emergency support to traveller(s).</p> <p>Please provide details/ Standard Operating Procedure of your after-hour support e.g.</p>	1	Section 11.3.6					

#	Technical Evaluation Criterion	Weight	Reference in Bid Document	Compliant	Partially Compliant	Non-Compliant	Reference Page in Bidders Proposal	Comments
	<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 RTMC to process purchase orders within 24 hours to reduce queries on invoices</li> </ul>							
3	COMMUNICATION	5	SECTION 11.4					
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>		Section 11.4					
4	FINANCIAL MANAGEMENT	5	SECTION 11.5					
4.1	Describe how you will implement the negotiated rates and maximum allowable		Section 11.5					

#	Technical Evaluation Criterion	Weight	Reference in Bid Document	Compliant	Partially Compliant	Non-Compliant	Reference Page in Bidders Proposal	Comments
	<p>rates established either by the RTMC 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 RTMC</p> <p>Please describe credit card reconciliation process, timing and deliverables (if applicable).</p>							
5	<b>TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING</b>	15	SECTION 11.6					
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</p>		Section 11.6					

#	Technical Evaluation Criterion	Weight	Reference in Bid Document	Compliant	Partially Compliant	Non-Compliant	Reference Page in Bidders Proposal	Comments
	<p>(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 11.6.6</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 RTMC.</p> <p>Describe the compatibility of your online solution to fully integrate into RTMC ERP. Indicate the turnaround time to complete this process and a breakdown of the expected cost that will be associated with it (in case RTMC decide to integrate)</p>							
6	ACCOUNT MANAGEMENT	10	SECTION 11.7					
6.1	Provide the proposed Account Management structure / organogram.		Section 11.7.1 and 11.7.2					

#	Technical Evaluation Criterion	Weight	Reference in Bid Document	Compliant	Partially Compliant	Non-Compliant	Reference Page in Bidders Proposal	Comments
	<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 service issues. Complaint handling procedure must be submitted.</p> <p>What is in place to ensure that the RTMC 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 11.7.3</p> <p>Section 11.7.4</p> <p>Section 11.7.5</p> <p>Section 11.7.6</p> <p>Section 11.7.7</p>					
7	<b>VALUE ADDED SERVICES</b>	5	<b>SECTION 11.8</b>					
7.1	Please provide information on any value-added services your company can offer.	2	Section 11.8					

#	Technical Evaluation Criterion	Weight	Reference in Bid Document	Compliant	Partially Compliant	Non-Compliant	Reference Page in Bidders Proposal	Comments
	ASATA Certificate	3						
8	<b>COST MANAGEMENT</b>	10	<b>SECTION 11.9</b>					
8.1	Describe your detailed strategic cost savings plan for the contract duration. What items do you target for maximum cost savings results?  Describe how you will assist the RTMC to realise cost savings on annual travel spend.		Section 11.9					
9	<b>QUARTERLY AND ANNUAL TRAVEL REVIEWS</b>	5	<b>SECTION 11.10</b>					
9.1	Provide a sample of a Quarterly and Annual review used for performance management during the life cycle of the contract.		Section 11.10					
10	<b>OFFICE MANAGEMENT</b>	10	<b>SECTION 11.11</b>					

#	Technical Evaluation Criterion	Weight	Reference in Bid Document	Compliant	Partially Compliant	Non-Compliant	Reference Page in Bidders Proposal	Comments
10.1	<p>Provide an overview of your back-office processes detailing the degree of automation for air tickets workflow, ground arrangements and bill back workflow.</p> <p>Describe roles and responsibilities of assigned staff. Please provide the management 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>		Section 11.11					
<b>PRESENTATION</b>		<b>20</b>						
	<p><b>Part A:</b> presentation must not exceed 30 minutes</p> <ul style="list-style-type: none"> <li>- Summary of the proposal</li> </ul>							

#	Technical Evaluation Criterion	Weight	Reference in Bid Document	Compliant	Partially Compliant	Non-Compliant	Reference Page in Bidders Proposal	Comments
	<ul style="list-style-type: none"> <li>- Value added Services - Provide information on any value-added services that can be offered to SARS.</li> <li>- 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</li> <li>- Reference checks</li> </ul> <p>Q&amp;A on technical submission.</p>							

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### **BIDDER DECLARATION (Section 18)**

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 RTMC;
- b. Employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- c. Act with circumspection and treat RTMC 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 RTMC;
- f. Avoid fraudulent and misleading advertising, canvassing and marketing;
- g. Conduct business activities with transparency and consistently uphold the interests and needs of RTMC as a client before any other consideration; and
- h. Ensure that any information acquired by the bidder(s) from RTMC 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)