



planning, monitoring
& evaluation

Department:
Planning, Monitoring and Evaluation
REPUBLIC OF SOUTH AFRICA

ANNEXURE B

DESKTOP

AND

TECHNICAL EVALUATION

ANNEXURE B: PART 1: DESKTOP, PART 2: SITE VISIT PRESENTATION AND PART 3: ONLINE TOOL DESMONSTRATION

The form must be submitted in **File 1 -Technical file**), **Exhibit 2**(Refer to par. 9.2 of the ToR). The bidders must ensure that their technical proposal is clearly structured to cover all the sections as per listed criteria's below.

NB* Bidders are required to indicate the specific page numbers/paragraph in their proposal where to find the Functional criteria indicated in Gate 1 per criteria.

1. Gate 1: Desktop Evaluation Criteria

Annexure B - Part 1 (Desktop)

#	DESKTOP EVALUATION CRITERION (GATE 1)	MOTIVATION / RESPONSE (TO BE COMPLETED BY THE BIDDER)
1	The bidder is able to provide the travel services required by the department (can facilitate all services indicated under par 12.3 of this document as well as the costing sheet). Refer to ANNEXURE A1.1(Service Requirements) The bidder must tick the appropriate block for all indicated services and sign off the annexure as motivation/response for this criterion. • Cannot provide all the services required (Score=0) • Can provide all the services required (Score = 4)	Provide a completed and signed <u>ANNEXURE A 1.1 (Service Requirements)</u> as a motivation for these criteria.
2	Office management • Key Account Manager has 3 years' experience (Score = 1) • Key Account Manager has more than 3 years' experience (Score = 2) • Key Account Manager has more than 4 years' experience (Score =3) • Key Account Manager has more than 5 years' experience (Score = 4)	

#	DESKTOP EVALUATION CRITERION (GATE 1)	MOTIVATION / RESPONSE (TO BE COMPLETED BY THE BIDDER)
3	Dedicated team of consultant/s to deal with VIP/Executives <i>No dedicated team of consultant/s specifically allocated to deal with VIP / Executive travel bookings (Score=0)</i> <i>A dedicated team of consultant/s is specifically allocated to deal with VIP/Executive travel bookings (Score=4)</i>	
4	Online booking tool <i>Third-party online booking tool that cannot be customised to DPME requirements (Score = 1)</i> <i>Online booking tool that can be customised to DPME requirements - each change will be at a cost to DPME (Score = 2)</i> <i>Online booking tool that can be customised to DPME requirements - initial setup at a cost to DPME, but subsequent changes free of charge (Score = 3)</i> <i>Online booking tool available that is fully customisable to DPME requirements at no cost to DPME (Score = 4)</i>	
5	The bidder can fully comply with all National Treasury negotiated rates, limits and reporting requirements. <i>The bidder cannot comply with the stipulated requirements (Score=0)</i> <i>Bidder can fully comply with requirements (Score = 4)</i>	

A bidder must receive at least 300 out of 400 points (75%) to proceed to Gate 2. The points received for each criteria will be calculated by averaging the scores awarded by each Bid Evaluation Committee member.

2. Gate 2: Technical Evaluation Criteria(Site visit presentation and online tool demonstration)

Annexure B: Part 2 (Site Visit Presentation)

#	TECHNICAL EVALUATION CRITERION - SITE VISIT PRESENTATION (GATE 2)	COMMENTS
1	Value Added Services: The service provider can provide; Electronic voucher retrieval via web and smart phones, SMS notification for travel confirmations, VIP services for executives that include but not limited to check in support as well as travel alerts and other related information indicated on 12.8.1. • <i>The bidder cannot comply with the stipulated requirements (Score=0)</i> • <i>Bidder can fully comply with the requirements(Score = 4)</i>	To be covered through site visit presentation
2	TMC can manage third-party service provider accounts which includes follow up on outstanding invoices, quality assurance of invoices and rectification of incorrect invoices prior submission to DPME • <i>The bidder cannot comply with the stipulated requirements (Score=0)</i> • <i>Bidder can fully comply with the requirements(Score = 4)</i>	To be covered through site visit presentation
3	The TMC has Account Management structure in place to respond to the queries, needs and requirements of the DPME and a complaint handling procedure to assist in managing and recording the compliments and complaints raised by DPME, • <i>The bidder cannot comply with the stipulated requirements (Score=0)</i> • <i>Bidder can fully comply with the requirements (Score = 4)</i>	To be covered through site visit presentation

#	TECHNICAL EVALUATION CRITERION - SITE VISIT PRESENTATION (GATE 2)	COMMENTS
4	The TMC can consolidate all management information related to travel expenses, customize reports to DPME requirements and provide travel management reports indicated on 12.6.6 as and when required, at no cost. <i>The bidder cannot comply with the stipulated requirements (Score=0)</i> <i>Bidder can fully comply with requirements (Score = 4)</i>	To be covered through site visit presentation
5	The TMC has strategic global partners with knowledge and expertise in travel management to assist with international travel bookings and advise on the most efficient and cost-effective travel options, in relation to services such as accommodation, flights, ground transport, travel insurance and etc <i>The bidder cannot comply with the stipulated requirements (Score=0)</i> <i>Bidder can fully comply with requirements (Score = 4)</i>	To be covered through site visit presentation

A bidder must receive at least 300 out of 400 points (75%) for Score Card 2A to proceed to Gate 3. The points received for each criteria will be calculated by averaging the scores awarded by each Bid Evaluation Committee member.

Annexure B: Part 3 (Online Tool Demonstration)

#	TECHNICAL EVALUATION CRITERION - ONLINE TOOL DEMONSTRATION (GATE 2)	COMMENTS
1	Par 12.4.1 – booking tool customisable to meet unique DPME requirements: <i>The requirements cannot be met at all (Score=0)</i> <i>The requirements cannot be met within three months (Score = 1)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i> <i>Current system fully meets the requirement (Score = 4)</i>	To be covered through site visit testing on online tool
2	Par 12.4.2 – Online tool access and security measures <i>The requirements cannot be met at all (Score=0)</i> <i>The requirements cannot be met within three months (Score = 1)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i> <i>Current system fully meets the requirement (Score = 4)</i>	To be covered through site visit testing on Online tool
3	Par 12.4.3 – Cost centre and approval setup <i>The requirements cannot be met at all (Score=0)</i> <i>The requirements cannot be met within three months (Score = 1)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i> <i>Current system fully meets the requirement (Score = 4)</i>	To be covered through site visit testing on Online tool
4	Par 12.4.4 – policy groups setup <i>The requirements cannot be met at all (Score=0)</i> <i>The requirements cannot be met within three months (Score = 1)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i>	To be covered through site visit testing on Online tool

#	TECHNICAL EVALUATION CRITERION - ONLINE TOOL DEMONSTRATION (GATE 2)	COMMENTS
	- Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3) - Current system fully meets the requirement (Score = 4)	
5	Par 12.4.5 – Traveller profiles - The requirements cannot be met at all (Score=0) - The requirements cannot be met within three months (Score = 1) - Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2) - Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3) - Current system fully meets the requirement (Score = 4)	To be covered through site visit testing on Online tool
6	Par 12.4.6 – Approval flows / escalations setup - The requirements cannot be met at all (Score=0) - The requirements cannot be met within three months (Score = 1) - Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2) - Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3) - Current system fully meets the requirement (Score = 4)	To be covered through site visit testing on Online tool
7	Par 12.4.7 – Supporting documentation - The requirements cannot be met at all (Score=0) - The requirements cannot be met within three months (Score = 1) - Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2) - Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3) - Current system fully meets the requirement (Score = 4)	To be covered through site visit testing on Online tool
8	Par 12.4.8 – All services / sector listed can be booked online - The requirements cannot be met at all (Score=0) - The requirements cannot be met within three months (Score = 1) - Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2) - Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3) - Current system fully meets the requirement (Score = 4)	To be covered through site visit testing on Online tool

#	TECHNICAL EVALUATION CRITERION - ONLINE TOOL DEMONSTRATION (GATE 2)	COMMENTS
9	Par 12.4.9 – Information available to booker / approver <i>The requirements cannot be met at all (Score=0)</i> <i>The requirements cannot be met within three months (Score = 1)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i> <i>Current system fully meets the requirement (Score = 4)</i>	To be covered through site visit testing on Online tool
10	Par 12.4.10 – Invoicing data <i>The requirements cannot be met at all (Score=0)</i> <i>The requirements cannot be met within three months (Score = 1)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i> <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i> <i>Current system fully meets the requirement (Score = 4)</i>	To be covered through site visit testing on Online tool

BIDDER DECLARATION (Section 22)

The bidder hereby declare the following:

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

- Act honestly, fairly, and with due skill, care and diligence, in the interests of [DPME];
- Employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- Act with circumspection and treat [DPME] fairly in a situation of conflicting interests;
- 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 [DPME];
- f. Avoid fraudulent and misleading advertising, canvassing and marketing;
- g. Conduct business activities with transparency and consistently uphold the interests and needs of [DPME] as a client before any other consideration; and
- h. Ensure that any information acquired by the bidder(s) from [DPME] 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)*