Annexure A2

DESKTOP EVALUATION TECHNICAL SCORECARD

AND COMPLIANCE CHECKLIST

ANNEXURE A2: EVALUATION TECHNICAL SCORECARD

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

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
TO BE COMPLETED BY THE TENDERING INSTITUTION				***TO BE COMPLETED BY THE BIDDER***	
DESKTOP EVALUATION - GATE 1		**100**			
1	**GENERAL**	**20**	**SECTION 15.3.2**		
1.1	Provide the reference letters from at least three (3) contactable existing/recent clients (within past 3 years) which are of a similar size to C-BRTA whom we may contact for references. The signed letter from the client must include client`s letterhead, 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. a) Non-submission/ irrelevant letter – **0**	**20**	Section 15.3.1 (k)		

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	points b) 1 reference letter – **2 points** c) 2 reference letters – **5 points** d) 3 reference letters – **10 points** e) 4 reference letters – **15 points** f) 5 reference letters or more – **20 points**				

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2	**RESERVATIONS**	**25**	**SECTION 15.3.2 TO 15.3.6**		
2.1	**Manage all reservations/ bookings.** Describe how all travel reservations/ bookings are handled e.g. accommodation; car rental; flights, etc.	**5**	Section 15.3.2 Section 15.3.3		

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	This will include, without limitation, an example of a detailed complex itinerary confirmation that includes air **(1 point)**, car rental **(1 point)**, accommodation **(1 point)**, shuttle **(1 point)**, transfers **(1 point)** confirmation numbers and additional proof of competency.		Section 15.3.4 Section 15.3.5		
2.2	**Manage group bookings.** 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.	**5**	Section 15.3.2 (i)		
2.3	**Directly negotiated rates.** Negotiated airline fares, accommodation establishment rates, car rental rates, etc, that are negotiated directly or established by National Treasury or by C-BRTA are **non-commissionable**, where commissions are earned for C-BRTA bookings. Provide how all these commissions should be returned to C-BRTA on a quarterly basis**. (3 points)** Describe how these specific rates will be secured. Describe any automated tools that will	**5**	Section 15.3.2 (p)		

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	be used to assist with maintenance and processing of the said negotiated rates. **(2 points)**				
2.4	**Manage airline reservations.** Describe in detail the process of booking the most cost-effective and practical routing for the traveller. 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).**	**5**	Section 15.3.3		
2.5	**After-hours and emergency services** The bidder must have capacity to provide reliable and consistent after hours and emergency support to traveller(s). Please provide details/ Standard Operating Procedure of your after-hour support e.g. - how it is accessed by Travellers **(1 point**),	**5**	Section 15.3.6		

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	- where it is located, centralized/ regionalised, in-country (owned)/ outsourced **(2 points),** - is it available 24/7/365 **(1 point),** - Reminders to C-BRTA to process purchase orders within 24 hours to reduce queries on invoices **(1 point)**.				
3	**COMMUNICATION**	**5**	**SECTION 15.4**		
3.1	Describe how you will ensure that travel bookers are informed of the travel booking processes. **(2 points)** Describe your communication process where the traveller, travel co-ordinator/booker and travel management company will be linked in one smooth continuous workflow**. (3 points)**	**5**	Section 15.4		
4	**FINANCIAL MANAGEMENT**	**5**	**SECTION 15.5**		
4.1	Describe how you will implement the negotiated rates and maximum allowable rates established either by the C-BRTA or the National Treasury.	**5**	Section 15.5		

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	(2 points) 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 C-BRTA. **(2 points)**				
5	**TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING**	**15**	**SECTION 15.6**		
5.1	Describe the proposed booking system e.g. Global Distribution System (GDS), Online Booking Tool (OBT) or Self-Booking tool (SBT). **(3 points)** Describe how travel consultants' access and book web airfares i.e. non-GDS inventories (low-cost carriers/ consolidators), and hotel web rates. **(3 points)** Describe how you will manage data and management information such as traveller profiles, tracking of savings and missed savings,	**15**	Section 15.6		

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	tracking of unused airline tickets, cancellation, traveller behaviour, transaction level data. **(4 point)** Give actual examples of standard reports that you currently have available. Give an indication if reports can be customised. **(2 points)** Provide a description of all technology and reporting products proposed for C-BRTA. **(3 points)**				
6	**ACCOUNT MANAGEMENT**	**10**	**SECTION 15.7**		
6.1	Provide the proposed Account Management structure / organogram. **(2 points)** Describe what quality control procedures/ processes you have in place to ensure that your clients receive consistent quality service. **(2 points)** Describe how queries, requests, changes, and cancellations will be handled. What is your mitigation and issue resolution process? Provide a detailed response indicating performance standards with respect to resolving	**10**	Section 15.7.1 and 15.7.2 Section 15.7.3 Section 15.7.4		

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	service issues. Complaint handling procedure must be submitted**. (2 points)** What is in place to ensure that the C-BRTA's travel Policy is enforced. **(1 point)** How will you manage the service levels in the SLA and how will you go about doing customer satisfaction surveys? **(2 point)** Indicate what workshops/training will be provided to Travellers and /or Travel Bookers**. (1 point)**		Section 15.7.5 Section 15.7.6 Section 15.7 7		
7	**VALUE ADDED SERVICES**	**5**	**SECTION 15.8**		
7.1	Provide information on any value-added services your company can offer. **(5 points)**	**5**	Section 15.8		
8	**COST MANAGEMENT**	**5**	**SECTION 15.9**		
8.1	Describe your detailed strategic cost savings plan for the contract duration. What items do you target for maximum cost savings results? **(3 points)**	**5**	Section 15.9		

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	Describe how you will assist the C-BRTA to realise cost savings on annual travel spend. **(2 points)**				
9	**QUARTERLY AND ANNUAL TRAVEL REVIEWS**	**5**	**SECTION 15.10**		
9.1	Provide a sample of a Quarterly review **(2 points)** and Annual review used for performance management during the life cycle of the contract**. (3 points)**	**5**	Section 15.10		
10	**OFFICE MANAGEMENT**	**5**	**SECTION 15.11**		
10.1	Provide an overview of the TMC back-office processes detailing the degree of automation for air tickets workflow and ground arrangements workflow**. (2 points)** Describe roles and responsibilities of assigned staff. Please provide the management hierarchy. **(2 points)** Describe type of training provided to travel	**5**	Section 15.11		

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	agency personnel. **(1 point)**				
11	**PRESENTATION AND SYSTEMS DEMONSTRATION – GATE 2 (Online Tool)**	**100**			
11.1	**Provide a detailed presentation on the following:** ✓ How the proposed online tool would be compliant to National Treasury cost containment measures **(10 points)** and ✓ How the proposed online tools would be compliant to C-BRTA Travel policy **(10 points)** **Online Tool Capabilities - Demonstrate how the system will manage the following:** ✓ All the reservations **(10 points)**				

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	✓ Flight **(10 points)** ✓ Accommodation **(5 points)** ✓ Car hire **(5 points)** ✓ Shuttle **(5 points)** ✓ Transfers **(5 points)** ✓ Conference **(10 points)** **Demonstrate how the system will track the following:** ✓ All savings **(10 points)** ✓ Missed savings**, (5 points)** ✓ Track unused airline tickets **(5 points)** ✓ Cancellations **(5 points).** ✓ Demonstrate system`s capability to customise				

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	reports. **(5 points)**				

BIDDER DECLARATION (Section 22)

The bidder hereby declares the following:

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

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