



**Annexure A2**

**DESKTOP EVALUATION TECHNICAL SCORECARD  
AND COMPLIANCE CHECKLIST**

---

---

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

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

Section No	Technical Criteria	Reference page in Proposal	Comments
1.1	<b>References</b>	Exhibit 1: 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 14 to 20	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.
2.2	<b>After-hours and emergency services</b>	Exhibit 3: Page 21 to 22	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.

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 (Criterion 1, 2, 3, 4, 5, 6, 7 and 8)		100			
1	GENERAL (Criterion 1)	20	SECTION		
1.1	<p><b>References:</b></p> <p>Provide the reference letters from contactable existing/recent clients (within past 3 years) which are of a similar size to the South African Weather Service whom we may contact for references. The letter <b>must</b> 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.</p> <p><u>Weight allocation:</u></p> <p>0 = No reference letter or reference letter/s provided incomplete.</p> <p>5 = One reference letter provided</p> <p>10 = Two reference letters provided</p> <p>15 = Three reference letters provided</p> <p>20 = Four or more reference letters provided</p>	20	Section 14.3.1 (L)		
	TOTAL (Criterion 1)	20			

The following evaluation rating scale will be used to evaluate the responses in relation to the Technical Evaluation Criterion listed below under Sections (2) Reservations, (3) Communication, (4) Financial Management, (5) Technology, Management Information and Reporting, (6) Account Management, (7) Value Added Services, (8) Cost Management and (9) Office Management

Rating	Definition	Score
<b>Excellent</b>	<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.	<b>5</b>
<b>Good</b>	<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.	<b>4</b>
<b>Acceptable</b>	<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.	<b>3</b>
<b>Minor Reservations</b>	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.	<b>2</b>
<b>Serious Reservations</b>	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.	<b>1</b>
<b>Unacceptable</b>	<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.	<b>0</b>

#	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	
2	RESERVATIONS (Criterion 2)	20	SECTION		
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>	20	<p>Section 14.3.2</p> <p>Section 14.3.3</p> <p>Section 14.3.4</p> <p>Section 14.3.5</p>		
2.2	<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> <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> </ul>	5	Section 14.3.6		

#	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	
	- Reminders to South African Weather Service to process purchase orders within 24 hours to reduce queries on invoices				
3	<b>COMMUNICATION (Criterion 3)</b>	8	SECTION		
3.1	Describe how you will ensure that travel bookers are informed of the travel booking processes.  Describe your communication process where the traveller, travel co-ordinator/booker and travel management company will be linked in one smooth continuous workflow.	8	Section 14.4		
4	<b>FINANCIAL MANAGEMENT (Criterion 4)</b>	12	SECTION		
4.1	<b>Financial Management:</b>  Describe how you will implement the negotiated rates and maximum allowable rates established either by the South African Weather Service or the National Treasury.	12	Section 14.5.1		

#	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	
	<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 the South African Weather Service.</p>		<p>Section 14.5.4</p> <p>Section 14.5.5</p> <p>Section 14.5.7</p>		
<b>5</b>	<b>ACCOUNT MANAGEMENT (Criterion 5)</b>	<b>10</b>	<b>SECTION</b>		
5.1	<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</p>	10	<p>Sections 14.7.1 and 14.7.2</p> <p>Section 14.7.3</p> <p>Section 14.7.4</p>		

#	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	
	<p>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>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 14.7.6</p> <p>Section 14.7.7</p>		
<b>6</b>	<b>VALUE ADDED SERVICES (Criterion 6)</b>	<b>5</b>	<b>SECTION</b>		
6.1	Please provide information on any value-added services your company can offer.	5	Section 14.8		
<b>7</b>	<b>COST MANAGEMENT (Criterion 7)</b>	<b>10</b>	<b>SECTION</b>		
7.1	<p>Describe your detailed strategic cost savings plan for the contract duration. What items do you target for maximum cost savings results?</p> <p>Describe how you will assist the South African Weather Service to realise cost savings on</p>	10	Section 14.9		



#	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	
	annual travel spend.				
8	<b>OFFICE MANAGEMENT (Criterion 8)</b>	<b>10</b>	<b>SECTION</b>		
8.1	<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>	10	Section 14.11		
	<b>TOTAL (Criterion 2 to 8)</b>	<b>80</b>			
	<b>GRAND TOTAL: (Criterion 1 + 2 + 3 + 4 + 5 + 6 + 7 + 8)</b>	<b>100</b>			

---

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