
Annexure A1

DESKTOP EVALUATION FUNCTIONAL SCORECARD

AND COMPLIANCE CHECKLIST

ANNEXURE A1: DESKTOP EVALUATION FUNCTIONAL SCORECARD AND COMPLIANCE CHECKLIST

The form must be submitted in File 1 (Functional file)

NB: EXAMPLE OF HOW THE BIDDER MUST COMPLETE THE COMPLIANCE CHECKLIST:

Section No	Technical Criteria	Reference page in Proposal	Comments
1.2	Experience of the bidder	Page 9 to 12	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.
2.1	Manage all reservations and bookings	Page 13 to 15	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.
2.2	Manage all refunds and non-refundable airline-tickets	Page 17 to 20	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.

The Bidders will be evaluated according to the Functional evaluation criteria in the scorecard below.

Bidders must indicate their ability to do the following and to substantiate as required with supporting documentation.

#	FUNCTIONAL 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		100			
1	GENERAL	Total weight (20)	SECTION 5.3.1		
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. Provision of a transition plan will earn the bidder 10 points. If no detailed transition plan is provided to ensure a smooth transition, a discretionary points allocation will be made by the BEC. If no transition plan is submitted no points will be allocated.	10	Section 5.3.1 (p)		
1.2	Provide positive reference letters from at least three (3) contactable existing/recent clients (within past 3 years) which are of a similar size to the RAF whom we may contact for	5	Section 5.3.1 (q)		

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	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. Three (3) or more positive references: 5 points Two (2) or less positive references: 0 points				
1.3	ASATA (Association of South African Travel Agents) Membership. The bidder must provide proof of such membership Proof not supplied: 0 points Proof supplied: 5 points.	5	Section 5.3.1 (r)		

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TO BE COMPLETED BY THE TENDERING INSTITUTION				TO BE COMPLETED BY THE BIDDER	
2	RESERVATIONS	Total weight (42)	SECTION 5.3.		
2.1	Manage all reservations/ bookings. Describe how all travel reservations/ bookings are handled e.g. hotel (accommodation); car rental; flights etc. 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. Each point above scores 1 point.	5	Section 5.3.2 (b) Section 5.3.2 (c) Section 5.3 2 (d) Section 5.3 2 (e) Section 5.3 2 (f)		

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2.2	Manage group bookings. 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. 0 points will be awarded if this capability is not included in the bidder's proposal.	5	Section 5.3.2 (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 the RAF are non-commissionable, where commissions are earned for the RAF bookings, all these commissions should be returned to the RAF on a quarterly basis. Describe how these specific rates will be secured. (10 points) Describe any automated tools that will be used to assist with maintenance and processing of the said negotiated rates. (7 points)	17	Section 5.3.2 (p)		

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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 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, excess baggage - travellers with disabilities, etc. - other services relating to reservations (specify) Each point above scores 2 points	10	Section 5.3.3		

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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, • where it is located, centralized/ regionalised, in-country (owned)/ outsourced etc. • is it available 24/7/365 • Reminders to the RAF to process purchase orders within 24 hours to reduce queries on invoices • Other (specify) Each point above scores 1 point	5	Section 5.3. 6		

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3	COMMUNICATION	Total weight (5)	SECTION 5.4		
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 5.4		
4	FINANCIAL MANAGEMENT	Total weight (5)	SECTION 5.6		
4.1	- Describe how you will implement the negotiated rates and maximum allowable rates established either by the RAF or the National Treasury. - Describe how you will manage the 30-day bill-back account facility. - Describe how pre-payments will be handled where it is required for smaller	5	Section 5.6		

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	Bed & Breakfast /Guest House facilities. - 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 the RAF - Describe how you will ensure that invoices from the hotel and other third party service providers are received in a timely manner. Each point above scores 1 point				
5	TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING	Total weight (7)	SECTION 5.7		
5.1	- Describe the proposed booking system e.g. Global Distribution System (GDS), Online Booking Tool (OBT) or Self-Booking tool (SBT). - Describe how travel consultants access and book web airfares i.e. non-GDS inventories (low cost carriers/ consolidators), and hotel web rates.	7	Section 5.7		

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	- 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. - Give actual examples of standard reports that you currently have available. Give an indication if reports can be customised. - Provide a description of all technology and reporting products proposed for the RAF. - Can the TMC comply with the RAF's monthly reporting requirement as prescribed by National Treasury? See Monthly Reporting Template prescribed by National Treasury Instruction No 3 of 2016/17. - Describe the compatibility of your online solution to fully integrate into the RAF's ERP. Indicate the turnaround time to complete this process and a breakdown of the expected cost that will be associated with it (in case the RAF decide to integrate) Each point above scores 1 point				

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6	ACCOUNT MANAGEMENT	Total weight (6)	SECTION 5.8		
6.1	- Provide the proposed Account Management structure / organogram. - Describe what quality control procedures/ processes you have in place to ensure that your clients receive consistent quality service. - 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. - What is in place to ensure that the RAF's travel Policy is enforced. - How will you manage the service levels in the SLA and how will you go about doing customer satisfaction surveys? - Indicate what workshops/training will be provided to Travellers and /or Travel Bookers.	6	Section 5.8.a and 5.8.b Section 5.8.c Section 5.8.d Section 5.8.e Section 5.8.f Section 5.8 g		

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	Each point above scores 1 point				
7	VALUE ADDED SERVICES	Total weight (2)	SECTION 5.9		
7.1	Please provide information on any value-added services your company can offer.	2	Section 5.9		
8	COST MANAGEMENT	Total weight (5)	SECTION 5.10		
8.1	Describe your detailed strategic cost savings plan for the contract duration. What items do you target for maximum cost savings results? (2 Points) Describe how you will assist the RAF to realise cost savings on annual travel spend. (3 Points)	5	Section 5.10		
9	QUARTERLY AND ANNUAL TRAVEL REVIEWS	Total weight (8)	SECTION 5.11		
9.1	Provide a sample of a Quarterly and Annual review reports used for performance	8	Section 5.11		

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	management during the life cycle of the contract. Examples must include; - Samples of the reports required by National Treasury (Refer to section 5.7 h) (3 Points) - Samples of each report listed under section 5.7 h (5 Points)				

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