



Annexure A2

**DESKTOP EVALUATION TECHNICAL SCORECARD
AND COMPLIANCE CHECKLIST**

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

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	Bidders must have capacity to provide reliable and consistent after hours and emergency support system to traveller(s).	5	
3.	COMMUNICATION (Criterion 3) Bidders to provide detailing the process used to communicate travel booking procedures to travel bookers.SOP must describe details how travel bookers are informed of the travel booking.	5	
4.	Financial Management (Criterion 4) Bidders to provide SOPs and monthly reports, letter or records relating to the that describe the TMC's financial management processes relating to the implementation of negotiated rates established by the South African Weather Service and invoicing processes.	10	
5.	ACCOUNT MANAGEMENT (Criterion 5) Bidders to provide the proposed Account Management structure / organogram of the company and SOP's describing at quality control procedures and detailed processes with respect to resolving service issues and complaints.	10	
6.	VALUE ADDED SERVICES (Criterion 6) Bidders to provide a service portfolio/ catalogue or customer value proposition document detailing any value-added services offered by the company that may enhance the travel management service.	5	
7.	COST MANAGEMENT (Criterion 7) Bidders to provide a strategic cost savings plan for the contract duration, detailing how the cost savings on annual travel spend will be realised which items will be targeted for maximum cost savings results	10	

8.	OFFICE MANAGEMENT (Criterion 8) Bidders to describe roles and responsibilities of assigned staff by providing the management hierarchy/ organogram, CV (experience) and training for training of travel agency personnel. In addition, the bidders must provide system generated reports/planning schedule the forecasting system employed to staff operations in response to volume changes owing to conferences, project-related volumes, etc.	10	
9.	TECHNOLOGY MANAGEMENT INFORMATION AND REPORTING (Criterion 9) 9.1 Online Booking system Bidder must present the online booking system detailing the back-office processes and the degree of automation for air tickets workflow, ground arrangements and bill back workflow. The TMC online booking system must generate booking, travel, and financial reports, including traveller details etc. 9.2 Data Management and Reporting Bidder must indicate the system's reporting capabilities, including the ability to generate reports on booking information, travel/trip information, and financial information.	10 5	
	TOTAL	100	

Table below explains the rating guidelines for the evaluation of functional criterion

Requirements	Point=0	Points = 1	POINTS = 2	POINTS = 3	POINTS = 4	POINTS = 5
Criterion 1						
1.1 EXPERIENCE Provide, in the company profile a list of entities indicating the number of years' travel management services had been rendered for each.	No experience in the Travel Industry	Less than 2 years in the travel industry.	2-3 years in the travel industry.	4-5 years in the travel industry.	6-9 years' and more in the travel industry.	10 years' and more in the travel industry.
1.2 REFERENCE Provide the reference letters from contactable existing/recent clients (within past 5 years) of annual volumes of 6000 or more transactions and organizational size of 400 employee or more to the South African Weather Service 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	No reference letter or reference letters/provided incomplete. (Reference section 14.3.1 (m))	One (1) reference letter provided. (Reference section 14.3.1 (m))	Two (2) Reference letters provided (Reference section 14.3.1.(m))	Three (3) reference letters provided (Reference section 14.3.1.(m))	Four (4) reference letters provided (Reference section 14.3.1 (m))	Five (5) or more letters provided (Reference section 14.3.1 (m))

expenditure, a brief description of the services that you provided and the level of satisfaction.						
1.3 COMPANY CAPABILITY Provide a list of testimonials/ reference letters from contactable existing/recent clients (within past 5 years) reflecting the utilisation of an Online Travel Booking System by a company for at least 5 years	No testimonial/ reference letter or reference letters provided is incomplete (Reference section 14.3.1 (n))	One testimonial /reference letter provided. (Reference section 14.3.1 (n))	Two testimonial/ reference letters provided. (Reference section 14.3.1 (n))	Three testimonial/ reference letters provided. (Reference section 14.3.1 (n))	Four testimonial/ reference letters provided. (Reference section 14.3.1 (n))	Five or more testimonial/letters provided. Reference section 14.3.1 (n)
Criterion 2						
2.1 RESERVATIONS Bidder to provide a system generated summary report/record illustrating the management of reservations and bookings. The system must describe how all travel reservations and bookings are performed, including accommodation, car rental, flights, conference and related services. The submission should also include records	No summary report/ record on reservations/ booking was submitted/ report provided was incomplete	The summary system report/record on reservations /booking complies with all criterions/ requirements from only 1 or 2 sections out of the 5 required sections namely; section 14.3.1(e) section 14.3.2; section 14.3.3; section 14.3.4; section 14.3.5.	The summary system report/record on reservation /bookings complies with all criterions/ requirements for only 3 or 4 sections out of the required 5 sections namely; section 4.3.1(e) section 14.3.2; section 14.3.3; section 14.3.4; section 14.3. 5.	The summary system report/ record reservations/ bookings comply with all criterions/ requirements from all the required 5 sections namely; section 4.3.1(e) section 14.3.2; section 14.3.3; section 14.3.4; section 14.3.5.	The summary system report/ record reservations/ bookings comply with all criterions/ requirements from all the required 5 sections namely; section 4.3.1(e) section 14.3.2; section 14.3.3; section 14.3.4; section 14.3.5. TMC to submit a list of 1-5 venue bookings (e.g. for conferences,	The summary system report/ record reservations/ bookings comply with all criterions/ requirements from all the required sections namely; section 4.3.1(e) section 14.3.2; section 14.3.3; section 14.3.4; section 14.3.5. TMC to submit a list of 6-10 venue bookings (e.g. for conferences,

of conference bookings and, an example of a detailed complex itinerary confirmation reflecting flight, hotel, car rental, passport requirements, confirmation numbers, and proof of competency.					events etc.) made in the past 5 years. (Reference 14.3.2 (i))	events) made in the past 5 years (Reference 14.3.2. (i))
2.2 AFTER HOURS The bidder to provide Standing Operating Procedure (SOP) and summary report to demonstrate company's capacity to provide reliable and consistent after-hours and emergency support services to travellers. a) The bidder is required to submit details and/or a Standard Operating Procedure outlining the after-hours support, including how travellers access the service, the location and structure of the support function (centralised, regionalised, in-country, owned or outsourced), and confirmation of 24/7/365 availability.	No Standard Operating Procedure (SOP) submitted or system report submitted/ SOP does not comply with stated requirements in section 14.3.6 (a-e).	SOP and system report submitted on after-hour support complies with only 1 or 2 of the criteria/ requirements out of the 5 listed in section 14.3.6 (a-e).	SOP and system report submitted on after-hour support complies with only 3 or 4 of the criteria/ requirements out of the 5 listed in section 14.3.6 (a-e).	SOP and system report submitted on after-hour support complies with all 5 of the criteria/ requirements listed in section 14.3.6 (a-e).	SOP and system report submitted on after-hour support complies with all 5 of the criteria/ requirements listed in section 14.3.6 (a-e). - Bidder to submit evidence/record of an automated notification system for after hour support	SOP and system report submitted on after-hour support complies with all 5 of the criteria/ requirements listed in section 14.3.6 (a-e). -Bidder to submit evidence/record of an automated notification system for after hour support. -Bidder to submit evidence/record of a multi-channel support platform, eg. mobile and messaging services to deliver after-hours support functionality

b) The bidder must also attach a system generated report with logged after hours cases over a period of 12 months. The submission should include evidence of system capabilities such as notification functionalities or multi-channel support platform, eg. mobile and messaging services						
Criterion 3						
3.COMMUNICATION The bidder to provide standard operating procedure (SOP) detailing the process used to communicate travel booking procedures to travel bookers Bidder to describe how travel bookers will be informed and guided on the travel booking processes. In addition, bidders must describe the communication workflow that ensures seamless	No standard operating procedure (SOP) submitted/ SOP does not comply with any of the stated requirements in section 14.4. (14.4.1-14.4.3)	SOP on communication workflow and processes for travel bookings complies with only 1 criterions/ requirements out of the 3 listed in section 14.4. (14.4.1-14.4.3)	SOP on communication workflow and processes for travel bookings complies with only 2 criterions/ requirements out of 3 listed in section 14.4. (14.4.1-14.4.3)	SOP on communication workflow and processes for travel bookings complies with all 3 criterions/ requirements listed in section 14.4. (14.4.1-14.4.3)	SOP on communication workflow and processes for travel bookings complies with all 3 criterions/ requirements listed in section 14.4. (14.4.1-14.4.3) - Bidder to submit evidence /record of a communication system consists of an automated system for notifications and updates.	SOP on communication workflow and processes for travel bookings complies with all 3 criterions/ requirements listed in section 14.4. (14.4.1-14.4.3) -Bidder to submit evidence/record of a communication system consists of an automated system for notifications and updates.

interaction between the traveller, travel coordinator/booker, and the Travel Management Company (TMC). The submission should include evidence automated communication system that supports real-time notifications and updates across multiple channels eg. mobile applications, email, and messaging platforms						-Bidder to submit evidence /record of multiple notification channels/platforms (mobile, email, messaging platform)
Criterion 4						
4.FINANCIAL MANAGEMENT The bidder to provide Standard Operating Procedure (SOPs) and monthly reports, letters, or relevant records that describe the TMC's financial management processes relating to the implementation of negotiated rates established by the South African Weather Service, including the management of the 30-day bill-back account facility and the	No SOP(standard operating procedure), monthly reports, letters, or relevant records that complies with /requirements stated in section 14.5(14.5.1-14.5.6)	SOPs and monthly reports, letters, or relevant records submitted, describe the company's financial management processes that complies with only 1,2 or 3 criterions /requirements out of the 6 listed in section 14.5(14.5.1-14.5.6)	SOPs and monthly reports, letters, or relevant records submitted, describe the company's financial management processes that complies with only 4 or 5 criterions /requirements out of the 6 listed in section 14.5(14.5.1-14.5.6).	SOPs and monthly reports, letters, or relevant records submitted, describe the company's financial management processes that complies to all the 6 criterions/ requirements listed in section 14.5(14.5.1-14.5.6).	SOPs and monthly reports, letters, or relevant records submitted, describe the company's financial management processes that complies to all the 6 criterions/ requirements listed in section 14.5(14.5.1-14.5.6). -The bidder to submit evidence of a Financial Management system that records information on real time weekly and monthly reporting	SOPs and monthly reports, letters, or relevant records submitted, describe the company's financial management processes that complies to all the 6 criterions/ requirements listed in section 14.5(14.5.1-14.5.6). -The bidder to submit evidence of a Financial Management system that records information on real time weekly and monthly reporting

handling of pre-payments for smaller Bed & Breakfast and Guest House establishments. Bidders must also explain the invoicing process, including the management and rectification of discrepancies between purchase orders and invoices, reconciliation of transactions, submission of supporting documentation, and the timely provision of invoices to the South African Weather Service. The submission to include evidence of an integrated Financial Management System that enables real-time transaction recording, supports weekly and monthly dashboard reporting, and includes an electronic workflow for managing invoice queries and payment discrepancies					(Dashboard)	monthly reporting (Dashboard) -The bidder to submit evidence of an electronic system for handling queries and discrepancies in payments of invoices.
Criterion 5						

5.ACCOUNT MANAGEMENT Bidders to provide the proposed Account Management structure or organogram of the company Bidders to submit SOP describing the quality control/ management procedures and processes implemented to ensure consistent service delivery to clients. Bidders submit SOP on complaints handling explaining how queries, requests, changes, and cancellations will be managed, including the mitigation and issue resolution process, as well as the performance standards for resolving service-related matters. Bidders must describe how service levels outlined in the SLA will be managed and how customer satisfaction surveys will be	No standard operating procedure (SOPs), training supporting documents submitted complies with /requirements stated in section 14.7 (14.7.1-14.7.8)	SOP's, training presentation and attendance register complies with only 1, 2 or 3 criterions/ requirements out of the 8 listed in section 14.7 (14.7.1-14.7.8)	SOP's, training presentation and attendance register complies with only 4, 5,6 or 7 criterions/ requirements out of the 8 stated in section 14.7 (14.7.1-14.7.8)	SOP's, training presentation and attendance register complies with all with 8 criterions/ requirement listed in section 14.7 (14.7.1-14.7.8)	SOP's, training presentation and attendance register complies with all with 8 criterions/ requirement listed in section 14.7 (14.7.1-14.7.8) -The bidder to submit evidence of an Account Management system that includes an automated query and complaints system/ application.	SOP's, training presentation and attendance register complies with all with 8 criterions/ requirement listed in section 14.7 (14.7.1-14.7.8) The bidder to submit evidence of an Account Management system that includes an automated query and complaints system/application. -The bidder to submit evidence of an Account Management system that includes an automated travellers' feedback system.
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conducted, supported by a relevant SOP. Bidders must indicate the workshops and/or training that will be provided to travellers and travel bookers and attach a presentation as evidence of the proposed training programme. The submission to include evidence of an Account Management System that incorporates automated workflows for handling queries and complaints, as well as an traveller feedback management function.						
Criterion 6						
6.VALUE ADDED SERVICES Bidders to provide a service portfolio/ catalogue or customer value proposition document detailing any value-added services offered by the company that may enhance the travel management service.	No, The service portfolio/ catalogue or customer value proposition document was submitted that complies criterions/ requirements stated in section 14.8 (14.8.1 -14.8.6)	The service portfolio/ catalogue or customer value proposition document consists of only 1,2,3 criterions/ requirements stated in section 14.8 (14.8.1 - 14.8.6)	The service portfolio/ catalogue or customer value proposition document consists of only of 4 or 5 criterions/ requirements stated in section 14.8 (14.8.1 -14.8.6)	The service portfolio/ catalogue or customer value proposition document consists of all 6 criterions/ requirements stated in section 14.8 (14.8.1 - 14.8.6)	The service portfolio/ catalogue or customer value proposition document consists of all 6 criterions/ requirements stated in section 14.8 (14.8.1 - 14.8.6) -The bidder to submit value added product features that includes	The service portfolio/ catalogue or customer value proposition document consists of all 6 criterions/ requirements stated in section 14.8 (14.8.1 - 14.8.6) -The bidder to submit value added product features that includes

					for example, dashboard function, CRM system.	for example dashboard function, CRM system. - The bidder to submit value added product features includes for example, with multiple integrated applications, user friendly and accessible features on the TMC online booking system website.
Criterion 7						
7.COST MANAGEMENT Bidders to provide a detailed strategic cost savings plan for the duration of the contract, indicating the areas targeted to achieve maximum cost savings or how the projected travel cost savings will be achieved, In addition, bidders must describe how they will assist the South African Weather Service in reducing annual travel expenditure.	No strategic cost savings plan was submitted that complies with criterion/requirements stated in section 14.9 (14.9.1-14.9.4)	The strategic cost savings plan complies with only 1 criterion/ requirement out of 3 listed in section 14.9 (14.9.1-14.9.4)	The strategic cost savings plan complies with only 2 or 3 criterions/ requirements out of 3 listed in section 14.9 (14.9.1-14.9.4)	The strategic cost savings plan complies with all 4 criterions/ requirements listed in section 14.9 (14.9.1-14.9.4)	The strategic cost savings plan complies with all 4 criterions/ requirements listed in section 14.9 (14.9.1-14.9.4) -The bidder to submit evidence of cost savings system that consists of a notification/update status (monthly and/or quarterly)	The strategic cost savings plan complies with all 4 criterions/ requirements listed in section 14.9 (14.9.1-14.9.4) - The bidder to submit evidence of cost savings system that consists of a notification/update status (monthly and/or quarterly) - The bidder to submit consist of a cost savings monthly and/or

.						quarterly generated report/ dashboard
Criterion 8						
8.OFFICE MANAGEMENT Bidders to provide CV's and management hierarchy /organogram that describes the roles and responsibilities of assigned staff. Bidders to submit attendance registers and training material from previous training sessions. The training records must indicate the type of training provided to travel agency personnel. Bidders to provide evidence in the form of a generated system report or daily planning schedule or dashboard that describes the forecasting system used to manage staffing operations in response to fluctuating travel volumes, such as	No CV's, organogram, training records or planning schedule was submitted.	CVs and organogram comply with roles and responsibilities from section 14.11 its managed.	CVs and organogram comply with roles and responsibilities from section 14.11 The training records consists of attendance registers and training details.	CVs and organogram comply with roles and responsibilities from section 14.11 The training records consists of attendance registers and training details. The system generated report/ planning schedule illustrates travel volumes and how its managed.	CVs and organogram comply with roles and responsibilities from section 14.11 The training records consists of attendance registers and training details. The system generated report/ planning schedule illustrates travel volumes and how its managed. -The submitted evidence consists of dedicated personnel for different travel arrangements. (domestic/international/ conferences). (Reference to 14.11)	CVs and organogram comply with roles and responsibilities from section 14.11 The training records consists of attendance registers and training details. The system generated report/ planning schedule illustrates travel volumes and how its managed. - The submitted evidence consists of dedicated personnel for different travel arrangements. (domestic/international/ conferences). (Reference to 14.11) -The submitted evidence consists of a dashboard showing the

conferences and project-related travel demands. must be provided.						management of travel volumes and requests
Criterion 9						
9. TECHNOLOGY MANAGEMENT INFORMATION AND REPORTING 9.1 Online Booking System Bidder to provide an overview of the TMC online booking system showing back-office processes, including the level of automation for air ticket workflows, ground arrangements, and bill-back processes. Bidders must describe the measures implemented within the online booking system to safeguard information against loss, breaches, or compromise, and to ensure that access is restricted to authorised personnel only.	The bidders did not present the TMC a demo of online booking system.	The bidders presented the TMC online booking system includes functionalities that complies with only 1,2,3, 4 or 5 criterions/ requirements out of the 12 listed in section 14.6.1 (a-m)	The bidders presented the TMC online booking system includes functionalities that complies with only 6,7,8,9,10 or 11 requirements out of the 12 listed in section 14.6. (a-m)	The bidders presented the TMC online booking system includes functionalities that complies with all 12 requirements listed in section 14.6. (a-m)	The bidders presented the TMC online booking system includes functionalities that complies with all 12 requirements listed in section 14.6. (a-m). - The bidder TMC online booking system consists of a cross-platform feature, that is accessible on both website platform and mobile devices.	The bidders presented the TMC online booking system includes functionalities that complies with all 12 requirements listed in section 14.6. (a-m) - The bidder TMC online booking system consists of a cross-platform feature, that is accessible on both website platform and mobile devices. -The bidder to submit evidence demonstrating compliance with the Protection of Personal Information Act (POPIA) and the implementation of robust cybersecurity controls for the online booking system
9.2 Data Management and		The bidders presented a	The bidders presented a	The bidders presented a	The bidders presented a reporting system that	The bidders presented a reporting system that

Reporting Bidders to provide evidence describing the online booking system's reporting capabilities, including the ability to generate reports on booking information, travel/trip information, and financial information. This may include electronic reports, system generated reports and dashboards. Reports should reflect details such as traveller names, travel dates, spend categories, after-hours activity, compliments and complaints, bookings outside the Travel Policy, reconciliation of commissions or rebates, daily invoices, and cancellation reports.		reporting system that includes functionalities that complies with only 1, 2, or 3 criteria/ requirements out of the 8 listed in section 14.6.2 (a-h and (hii))	reporting system that includes functionalities that complies with only 4, 5, 6, or 7 criteria/ requirements out of the 8 listed in section 14.6.2 (a-hii)	reporting system that includes functionalities that complies with all 8 criteria/ requirements listed in section 14.6.2 (a-hii)	includes functionalities that complies with all 8 criteria/ requirements listed in section 14.6.2 (a-hii)	includes functionalities that complies with all 8 criteria/ requirements listed in section 14.6.2 (a-hii)
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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 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)