



REQUEST FOR PROPOSAL NO. SCMU14-24/25:0004

Appointment of Travel Management Company to provide Travel Management Services to the EASTERN CAPE SPORTS RECREATION, ARTS, AND CULTURE

Annexure A2

DESKTOP EVALUATION TECHNICAL SCORECARD AND COMPLIANCE CHECKLIST

ANNEXURE A2: DESKTOP EVALUATION TECHNICAL SCORECARD AND COMPLIANCE CHECKLIST

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



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EXAMPLE OF HOW THE BIDDER MUST COMPLETE THE COMPLIANCE CHECKLIST:

Section No	Technical Criteria	reference page in bidder's proposal	Comments
1.2	Experience of the bidder	Pages 9 - 12	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.
2.1	Manage all reservations and bookings	Pages 15 - 18	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 19 - 21	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.

A RATING SCALE THAT BEC MEMBERS MAY USE

Rating	Definition	Score
Excellent	Exceeds 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.	5
Good	Satisfies the requirement with minor additional benefits . 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.	4
Acceptable	Satisfies 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.	3



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Minor Reservations	Satisfies the requirement with minor reservations . 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.	2
Serious Reservations	Satisfies the requirement with major reservations . 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.	1
Unacceptable	Does not meet the requirement . 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.	0



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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
<i>TO BE COMPLETED BY THE TENDERING INSTITUTION</i>				<i>TO BE COMPLETED BY THE BIDDER</i>	
DESKTOP EVALUATION		80			
1	GENERAL	30			
1.1	<p>EXPERIENCE</p> <p>Provide the reference letters from contactable existing/recent clients (within the past 10 years) which are of a similar size to Sport Recreation Arts and Culture whom we may contact for references. A signed letter by a Director or higher 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.</p>	25	Section 14.3.1 (k)		



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	<ul style="list-style-type: none"> 1-2 letters = 10 3-5 letters = 20 6 and more = 25 				
1.2	<p>ASATA (Association of South African Travel Agents) Membership. Provide proof of such membership.</p> <ul style="list-style-type: none"> Proof of valid ASATA Certificate = 5 points No valid proof of certificate = 0 point 	5			



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2	RESERVATIONS	15	SECTION 14.3.2 TO 14.3.6		
2.1	<p>Manage all reservations/ bookings and group bokings.</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> <p>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.</p>	5	<p>Section 14.3.2</p> <p>Section 14.3.3</p> <p>Section 14.3.4</p> <p>Section 14.3.5</p> <p>Section 14.3.2 (i)</p>		
2.2	<p>Directly negotiated rates</p> <p>Negotiated airline fares, accommodation establishment rates, car rental rates, etc, that</p>	5	Section 14.3.2 (q)		



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	<p>are negotiated directly or established by National Treasury or by Sport, Recreation, Arts and Culture are non-commissionable, where commissions are earned for the department bookings, all these commissions should be returned to department on a quarterly basis.</p> <p>Describe how these specific rates will be secured. Describe any automated tools that will be used to assist with maintenance and processing of the said negotiated rates.</p>				
2.3	<p>After-hours and emergency services</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"> - how it is accessed by Travellers, - where it is located, centralized/ regionalised, in-country (owned)/ outsourced etc. - is it available 24/7/365 	5	Section 14.3.6		



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	- Reminders to Sport Recreation Arts and Culture to process purchase orders within 24 hours to reduce queries on invoices				
3	COMMUNICATION	5	SECTION 14.4		
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.	5	Section 14.4		
4	FINANCIAL MANAGEMENT	5	SECTION 14.5		
4.1	Describe how you will implement the negotiated rates and maximum allowable rates established	5	Section 14.5		



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	<p>either by the Sport, Recreation, Arts and Culture or the National Treasury.</p> <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 & 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 department.</p>				
5	ACCOUNT MANAGEMENT	5	SECTION 14.7		
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</p>	5	Section 14.7.1 and 14.7.2		



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	<p>clients receive consistent quality service.</p> <p>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.</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 14.7.3</p> <p>Section 14.7.4</p> <p>Section 14.7.5</p> <p>Section 14.7.6</p> <p>Section 14.7.7</p>		
6	VALUE ADDED SERVICES	5	SECTION 14.8		
6.1	Please provide information on any value-added services your company can offer.	5	Section 14.8		



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7	QUARTERLY AND ANNUAL TRAVEL REVIEWS	5	SECTION 14.10		
7.1	Provide a sample of a Quarterly and Annual review used for performance management during the life cycle of the contract.	5	Section 14.10		
8. PRESENTATION		20			
8.1	<p>Part A: presentation must not exceed 90 minutes</p> <ul style="list-style-type: none"> - Summary of the proposal - Value added Services - Provide information on any value-added services that can be 	10			



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	<p>offered to Sport Recreation Arts and Culture</p> <ul style="list-style-type: none"> - Cost saving strategy - Describe and provide examples of cost savings initiatives implemented and achieved at <i>previous</i> clients. Indicate what items were targeted for maximum cost savings results - How the TMC will assist with improving traveller behaviour. - Reference checks - Q&A on technical submission. 				
8.2	<p>METHODOLOGY:</p> <ul style="list-style-type: none"> - Describe if the TMC has a database of establishments. How do you ensure the quality of the existing establishments? How do you manage complaints received from the 	10			



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	travelers?				
9	FINANCIAL STATEMENTS	10			
	<p>Submission of signed and audited financial statements not older than 2022-23 financial year with the current ratio where Current Assets ÷ Current Liabilities (CA÷CL) are calculated and scored as follows:-</p> <ul style="list-style-type: none"> - CA÷CL ≥ 2 = 10 points - CA÷CL 1 > < 2 = 5 points - CA÷CL < 1 = 0 points 				
	TOTAL	100			



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BIDDER DECLARATION (Section 21)

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 Sport, Recreation, Arts and Culture.
- b. Effectively employ the resources, procedures and appropriate technological systems for the proper performance of the services.
- c. Act with circumspection and treat the department 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 Eastern Cape Sport, Recreation, Arts and Culture.
- f. Avoid fraudulent and misleading advertising, canvassing and marketing;
- g. Conduct business activities with transparency and consistently uphold the interests and needs of EC Sport, Recreation, Arts and Culture a client before any other consideration; and
- h. Ensure that any information acquired by the bidder(s) from EC Sport, Recreation, Arts and Culture 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)