ANNEXURE 1

(PRE-QUALIFICATION CHECKLIST)

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|  | **CRITERIA** | **Complied** | **Not Complied** |
| 1 | Technical Proposal (1 original and 1 copy) submitted. |  |  |
| 2 | Fully completed and signed documents listed below:   * Invitation Bid-SBD 1 * Declaration of Interest-SBD 4 * Preference Point Claim Form-SBD 6.1 * Declaration of Bidder’s Past SCM Practices-SBD 8 * Certificate of Independence Bid Determination- SBD 9 |  |  |
| 3 | Proof of Registration on Central Supplier Database (CSD) (MAAA number) which confirms that:   * The bidder is Tax compliant (non-compliant bidders can be given 7 workings days to rectify tax compliance status) * No government employee is employed by the bidder or is a significant shareholder or board member of the bidder. * The bidder is not on the list of tender defaulters and is not on the list of restricted bidders. * B-BBEE level on CSD matches certificate submitted (bidders can be given 7 working days to rectify this if not correct). |  |  |
| 4 | Valid B-BBEE certificate (certified copy), which confirms that:   * The bidder is B-BBEE compliant on the date the bid closed (B-BBEE contribution level greater than 0) * the bidder is at least 51% black owned and at least 30% black women owned. |  |  |
| 5 | The bidder has an office in Gauteng that is staffed during normal office hours. |  |  |
| 6 | Valid IATA (International Air Transport Association) certificate/licence |  |  |
| 7 | Fully completed price schedule as per Annexure 3 **in a separate envelope – Must be completed electronically, NOT by hand** |  |  |
| 8 | Most recent audited annual financial statements attached |  |  |
| 9 | CV’s of the project team (Account Manager, travel coordinator etc.) indicating relevant experience. |  |  |
| 10 | At least three (3) signed trade references from other institutions including contact details. References include duration of contract, size of institution and indication performance. The trade references confirm that:   * The bidder has provider similar (to DPME scope) travel services to at least one organisation with 500 or more employees. * All three trade references confirm that the service provided was satisfactory * The bidder has at least three years’ experience in providing travel management services |  |  |
| 11 | NO briefing session |  |  |

Signature: *Date:*

*Print Name of Signatory:*

*Designation:*

FOR AND ON BEHALF OF: *(Bidding Company’s Name)*



**BID NO: 02/2024/25**

**BID DESCRIPTION: PROVISION OF TRAVEL MANAGEMENT SERVICES FOR PERIOD OF THREE (3) YEARS.**

# Annexure 1

**TECHNICAL EVALUATION SCORECARD:**

# Technical Approach

## ANNEXURE 1: TECHNICAL EVALUATION SCORECARD: TECHNICAL APPROACH

**The form must be completed and submitted in Envelope 1 (Technical file).**

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.

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| # | CRITERION | POINTS | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS’  PROPOSAL  TO BE COMPLETED BY TENDERING INSTITUTION |
| 1. | TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING | **10** | SECTION 4.1.1 |  |
| 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. Such transitional plan must include:   1. Engagement with and takeover from former supplier – (2 Points) 2. Obtaining traveller profiles – (2 Points) 3. Training of staff – (2 Points) 4. Detailed timelines and actions to be taken – (4 Points) |  |  |  |
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| # | CRITERION | POINTS | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS’ PROPOSAL  TO BE COMPLETED BY TENDERING INSTITUTION | |
| 1.2 | Provide a minimum of three (3) reference letters from contactable existing /recent clients (within the past 3 years) which are a similar size to SACE.  Reference letters must include the following information:   * Company name, * Physical address * Contact name and Phone number * Email address * Duration of contract * Value of contract and services provided   **NB# No points will be awarded for failure to submit the required reference letters.** |  |  | |  |
| # | CRITERION | POINTS | REFERENCE IN BID DOCUMENT | | REFERENCE PAGE IN  BIDDERS’ PROPOSAL  TO BE COMPLETED BY TENDERING INSTITUTION |
|  |  |  |  | |  |
| 2. | TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING | **10** | SECTION 4.1.1 |  |  |
| 2.1  2.2 | Describe in detail 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.  Submit an example of a Management Information Report (MIS) that covers the following:   1. Supplier list for accommodation, air fare, shuttles 2. After hour’s report |  |  | |  |

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|  | 1. Savings 2. Transactional level (name of traveller, date of travel, travel spend category) 3. Open voucher report, refund log and cancellations report 4. Service fees 5. Creditors ageing report.   **No points will be allocated for failure to comply with the above.** |  |  |  |
| 3. | COMMUNICATION AND RESERVATIONS | **20** | SECTION 4.1.2 |  |
| 3.1  3.2  3.3 | Describe your communication process and how you will ensure that travel bookers, traveller and TMC are informed of the travel booking processes and are linked to ensure one continuous workflow.  The TMC must demonstrate its capability as part of communication process to include and provide examples of :   1. SMS notifications of entire bookings (2 points) 2. e-tickets for flights and vouchers for car rentals, accommodation, and shuttle. (2 points 3. Email notifications (2 points)   Manage all reservations/ bookings:  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, travellers with disabilities, etc. Directly negotiated rates: |  |  |  |

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| 3.4  3.5 | Describe how discounted negotiated rates will be secured and describe any automated tools that will be used to assist with maintenance and processing of the said negotiated rates.  After-hours and emergency services:  The bidder must have capacity to provide reliable and consistent after hours and emergency support to traveller(s). Provide details/ Standard Operating Procedure (SOP) of your after-hour support. |  |  |  |
| 4. | FINANCIAL MANAGEMENT | 20 | SECTION 4.1.3 |  |
| 4.1  4.2  4.3  4.4 | Describe how you will manage the 30-day bill-back account facility.(03)  Such description must include the submission of annual audited financial statement OR Latest three months bank statement stamped by the bank of the TMC to demonstrate their capability to support SACE, the statement should reflect the following:(12)  Positive – Balance Sheet Positive – Financial Statement Positive – Cash Flow  **No points will be allocated for a negative balance.**  Provide a SOP which describes and sets out the process rectifying discrepancies between purchase orders and invoices, the reconciliation of transactions and the timely provision of invoices to SACE.  Describe with supporting documents how pre-payments will be handled where it is required for smaller Bed & Breakfast /Guest House facilities. |  |  |  |

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| # | CRITERION | | POINTS | | REFERENCE IN BID DOCUMENT | | REFERENCE PAGE IN  BIDDERS’ PROPOSAL  TO BE COMPLETED BY TENDERING INSTITUTION | |
| 5. | OFFICE MANAGEMENT AND ACCOUNT MANAGEMENT | | **20** | | SECTION 4.1.4 | |  | |
| 5.1  5.2  5.3  5.4 | Submit a SOP of your back-office processes detailing the degree of automation for air tickets workflow, ground arrangements and bill back workflow. (3 Points)  Provide a responsibility matrix of staff that will be assigned to this project. Include CV’s and  Industry relevant qualification of the assigned staff. (5 Points).  Provide the proposed Account Management structure / organogram. (2 Points)  Provide a Standard Operating Procedure document which reflects: -   1. reflects the quality control procedures / processes you have in place to ensure that your clients receive consistent quality service; (1 point) 2. 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 service issues. (3 points) 3. Complaint handling procedure must be submitted; (2 points) 4. the measures in place to ensure that the SACE’ travel policy is enforced in line with National   Treasury travel framework; (2 points)  what workshops / training will be provided to travel bookers. (2 point) | |  | |  | |  | |
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| 6. | COST MANAGEMENT AND VALUE-ADDED SERVICES | | | **10** | | SECTION 4.1.5 | |  | |
| 6.1  6.2 | Describe your detailed strategic cost savings plan for the contract duration. (5 Points)  Identify and describe value-added service your company can offer. (1 point will be allocated for every value-added service to a maximum of 5 points) | | |  | |  | |  | |
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| # | CRITERION | | | POINTS | | REFERENCE IN BID DOCUMENT | | REFERENCE PAGE IN  BIDDERS’ PROPOSAL  TO BE COMPLETED BY TENDERING INSTITUTION | |
| 7. | QUARTERLY AND ANNUAL REVIEWS | | | **5** | | SECTION 4.1.6 | |  | |
| 7.1 | Provide a sample of a Quarterly and Annual review used for performance management during the life cycle of the contract indicating:   1. Implementation of cost containment measures. (3 Points) 2. Compliance with service level agreement. (2 Points) | | |  | |  | |  | |