



LGSETA

CREATING GREATER IMPACT

ANNEXURE A2
LGSETA DESKTOP EVALUATION TECHNICAL SCORECARD
AND COMPLIANCE CHECKLIST

ANNEXURE A2: DESKTOP EVALUATION TECHNICAL SCORECARD AND COMPLIANCE CHECKLIST

TECHNICAL MANDATORY REQUIREMENTS

NB: Bidders must be fully compliant with below specifications; failure will result in disqualification. Bidders are also required by indicating that they meet the minimum requirements by stating YES/NO under the COMPLY YES/NO column and attach supporting information.

The bidder must comply with ALL the requirements by providing substantiating evidence in the form of documentation or information, failing which it will be regarded as "NOT COMPLY".

The bidder must provide a unique reference number (e.g. binder/folder, chapter, section, page) to locate substantiating evidence in the bid response. During evaluation, LGSETA reserves the right to treat substantiation evidence that cannot be located in the bid response as "NOT COMPLY".

The bidder must complete the declaration of compliance as per the below by writing with YES for "COMPLY", or NO for "NOT COMPLY" with ALL of the technical mandatory requirements, failing which it will be regarded as "NOT COMPLY".

#	TECHNICAL MANDATORY REQUIREMENTS	COMPLY YES/ NO	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>		
1	RESERVATIONS	COMPLY YES/ NO	SECTION 15.3.2 TO 15.3.6		
1.1	<p>Manage all reservations/ bookings.</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>Section 15.3.2</p> <p>Section 15.3.3</p> <p>Section 15.3.4</p> <p>Section 15.3.5</p>		
1.2	<p>Manage group bookings.</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>		Section 15.3.2 (i)		
1.3	<p>Directly negotiated rates</p> <p>Negotiated airline fares, accommodation establishment rates, car rental rates, etc., that</p>		Section 15.3.2 (q)		

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	<p>are negotiated directly or established by National Treasury or by LGSETA are non-commissionable, where commissions are earned for LGSETA bookings, all these commissions should be returned to LGSETA 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>				
1.4	<p>Manage airline reservations.</p> <p>Describe in detail the process of booking the most cost-effective and practical routing for the traveller.</p> <p>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.</p>		Section 15.3.3		
1.5	<p>After-hours and emergency services</p> <p>The bidder must have capacity to provide</p>		Section 15.3.6		

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	<p>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 - Reminders to LGSETA to process purchase orders within 24 hours to reduce queries on invoices 				
2	COMMUNICATION	COMPLY YES/ NO	SECTION 15.4		
2.1	<p>Describe how you will ensure that travel bookers are informed of the travel booking processes.</p> <p>Describe your communication process where the traveller, travel co-ordinator/booker and travel management company will be linked in one smooth continuous workflow.</p>		Section 15.4		

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3	FINANCIAL MANAGEMENT	COMPLY YES/ NO	SECTION 15.5		
3.1	<p>Describe how you will implement the negotiated rates and maximum allowable rates established either by the LGSETA 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 LGSETA</p> <p>Please describe credit card reconciliation process, timing and deliverables (LGSETA in process to procure Credit card)</p>		Section 15.5		

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4	TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING	COMPLY YES/ NO	SECTION 15.6		
4.1	<p>Describe the proposed booking system e.g. Global Distribution System (GDS), Online Booking Tool (OBT) or Self-Booking tool (SBT).</p> <p>Describe how the proposed booking system supports an elegant workflow that users can follow intuitively without having to refer to training manuals or asking for help.</p> <p>Describe how travel consultants access and book web airfares i.e. non-GDS inventories (low cost carriers/ consolidators), and hotel web rates.</p> <p>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. (refer to the detail in Section 15.6.6)</p> <p>Give actual examples of standard reports that you currently have available. Give an indication if reports can be customised.</p>		Section 15.6		

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	<p>Provide a description of all technology and reporting products proposed for LGSETA.</p> <p>Can the TMC comply with the LGSETA's monthly reporting requirement as prescribed by National Treasury? See Monthly Reporting Template prescribed by National Treasury Instruction No 3 of 2016/17.</p> <p>Describe the compatibility of your online solution to fully integrate into LGSETA's Finance System (Microsoft Dynamics GP). Indicate the turnaround time to complete this process and a breakdown of the expected cost that will be associated with it (in case LGSETA decide to integrate)</p>				
5	ACCOUNT MANAGEMENT	COMPLY YES/ NO	SECTION 15.7		
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 clients receive consistent quality service.</p>		<p>Section 15.7.1 and 15.7.2</p> <p>Section 15.7.3</p>		

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	<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>What is in place to ensure that the LGSETA's travel Policy is enforced?</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 15.7.4</p> <p>Section 15.7.5</p> <p>Section 15.7.6</p> <p>Section 15.7.7</p>		
6	VALUE ADDED SERVICES	COMPLY YES/ NO	SECTION 15.8		
6.1	Please provide information on any value-added services your company can offer.		Section 15.8		

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7	COST MANAGEMENT	COMPLY YES/ NO	SECTION 15.9		
7.1	Describe your detailed strategic cost savings plan for the contract duration. What items do you target for maximum cost savings results? Describe how you will assist the LGSETA to realise cost savings on annual travel spend.		Section 15.9		
8	QUARTERLY AND ANNUAL TRAVEL REVIEWS	COMPLY YES/ NO	SECTION 15.10		
8.1	Provide a sample of a Quarterly and Annual review used for performance management during the life cycle of the contract.		Section 15.10		
9	OFFICE MANAGEMENT	COMPLY YES/ NO	SECTION 15.11		

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9.1	<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>		Section 15.11		

TECHNICAL EVALUATION CRITERION

Desktop Technical Evaluation – Bidders will be evaluated out of 80 points and are required to achieve minimum threshold of 70 points of 80 points.

Presentation and system demonstration – Bidders will be evaluated out of 20 points and are required to achieve minimum threshold of 10 points out of 20 points.

The overall combined score must be equal or above 80 points in order to proceed to Gate 2 for Price and BBBEE evaluations

THE RATING SCALE THAT WILL BE USED

The evaluation of bidders' responses will be based on the following weighting of the proposals will be evaluated on a scale of 0-3 in accordance with the criteria below. The rating will be as follows:

Rating	Definition	Score
Excellent	Exceeds the requirement. Exceptional demonstration by the supplier of the 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.	3
Good	Satisfies the requirement with minor additional benefits . Above average demonstration by the supplier of the 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.	2
Serious Reservations	Satisfies the requirement with major reservations . Considerable reservations of the supplier's 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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DESKTOP EVALUATION		80			
1	DETAILED TRANSITION PLAN	15	SECTION 15.3.2		
1.1	<p>Provide a detailed transition plan for implementing the service without service interruptions and engage with the incumbent service provider to ensure a smooth transition.</p> <p>0 (0) = No submission of the required detailed transition plan.</p> <p>1 (5) = The bidder provided a generic transition plan that is not clear and detailed.</p> <ul style="list-style-type: none"> • the transition plan does not address matters concerning how the service will be implemented without service interruptions; • the transition plan only has basic information on how engagement with the incumbent service provider will be done to ensure a smooth transition; • the transition plan does not have 	15	Section 15.3.1 (j)		

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	<p>timelines;</p> <p>2 (10) = The bidder provided a good transition plan. There is a fair degree of detail that facilitates understanding of how the service will be implemented without service interruptions and how engagement with the incumbent service provider will be done to ensure a smooth transition.</p> <ul style="list-style-type: none"> the transition plan has fair degree of detail regarding the following components: <i>risks and contingencies; strategies and tools to be used as part of the transition plan; transition schedule, tasks and activities; specific resources needed to completed the transition; reporting and communication procedures;</i> <p>3 (15) = The bidder provided a comprehensive transition plan that sets them apart from other bidder (s). Comprehensive information is given to understand how the service will be implemented without service interruptions and how engagement with the incumbent service provider will be done to ensure a smooth transition.</p> <ul style="list-style-type: none"> the transition plan has comprehensive 				

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	information or details regarding the following components: <i>risks and contingencies; strategies and tools to be used as part of the transition plan; transition schedule, tasks and activities; specific resources needed to completed the transition; reporting and communication procedures;</i>				

#	DESKTOP TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
2	TRACK RECORD AND EXPERIENCE OF THE BIDDER	40	SECTION 15.3.1		
2.1	<p>The bidder must have a solid track record of between 5 - 10 years' or more experience in the provision of travel management services. The bidder must provide a profile, which details experience of the bidder, previous related projects completed (including the start and end date of the projects).</p> <p>0 (0) = No submission/irrelevant experience/profiles not demonstrating number of relevant experience/less than 5 years' experience.</p> <p>1 (5) = Submitted a profile demonstrating 5-years' relevant experience;</p> <p>2 (15) = Submitted a profile demonstrating 6 - 9 years' relevant experience;</p> <p>3 (20) = Submitted a profile demonstrating 10 years' relevant experience or more.</p>	20	Section 15.3.1 (k)		

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2.2	<p>Provide the reference letters from at least three (3) contactable existing/recent clients which are of a similar size to LGSETA 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 expenditure, a brief description of the services that you provided and the level of satisfaction.</p> <p>0 (0) = No submission of reference letter (s)/ irrelevant experience/reference letters not demonstrating number of relevant experience.</p> <p>1 (5) = Submitted 1 contactable reference with relevant experience .</p> <p>2 (15) = Submitted 2 contactable references with relevant experience,</p> <p>3 (20) = Submitted 3 contactable references with relevant experience.</p>	20	Section 15.3.1 (l)		

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3	HUMAN RESOURCE CAPABILITY	20	SECTION 15.11		
3.1	<p>Provide a list of the key personnel within a project team. This list must include the following key personnel, Strategic Account Travel Manager (Operational), Senior Consultant, Junior Consultant and Intermediate Consultant. Comprehensive CVs of the five key personnel identified above must be included and they must have between 5-10 years' experience in the provision of travel management services.</p> <p>The CVs of the Travel Manager (Operational) and Senior Consultant will be used for the allocation of points during functionality evaluation.</p> <p>0 (0) = No submission/ Travel Manager has irrelevant experience in the provision of travel management services/Travel Manager has less than 5 years' experience</p> <p>1 (5) = Travel Manager 's submitted CVs indicates 5 years' in the provision of travel</p>	10	Section 15.11.1		

	<p>management services.</p> <p>2 (8) = Travel Manager 's submitted CVs indicates 6-9 years' experience in the provision of travel management services.</p> <p>3 (10) = Travel Manager 's submitted CVs indicates 10 years and more experience in the provision of travel management services.</p> <p>The CVs of the Senior Consultant will be used for the allocation of points during functionality evaluation</p> <p>0 (0) = No submission/ Senior Consultant has irrelevant experience in the provision of travel management services/Less than 3 years' experience</p> <p>1 (5) = Senior Consultant 's submitted CVs indicates 3 years' in the provision of travel management services.</p> <p>2 (8) = Senior Consultant 's submitted CVs indicates 4 -6years experience in the provision of travel management services.</p> <p>3 (10) = Senior Consultant 's submitted CVs indicates 7 years and more experience in the provision of travel management services.</p>	10			
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#	DESKTOP TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
4	REGISTRATION WITH PROFESSIONAL ASSOCIATIONS	5	SECTION 15.3.1		
4.1	<p>The bidders must provide proof of ASATA (Association of South African Travel Agents) Membership.</p> <p>0 (0) = No submission of documentary proof of registration with the ASATA (Association of South African Travel Agents).</p> <p>1 (5) = The bidder (s) provided documentary proof of registration with the ASATA (Association of South African Travel Agents).</p>	5	Section 15.3.1 (l)		

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
PRESENTATION AND SYSTEM DEMONSTRATION		20			
	<p>Presentation must not exceed 60 minutes</p> <p>a) Summary of the proposal</p> <p>b) Value added Services - Provide information on any value-added services that can be offered to LGSETA.</p> <p>c) Cost saving strategy - Describe and provide examples of cost savings initiatives implemented and achieved at previous clients. Indicate what items were targeted for maximum cost savings results</p> <p>d) Online Booking Tool or System Demonstration</p> <p>A maximum of 5 weight points will be allocated per each criterion</p> <p>0 (0) = 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.</p>	<p>5</p> <p>5</p> <p>5</p> <p>5</p>			

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
	<p>1 (1) = 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.</p> <p>2 (3) = 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.</p> <p>3 (5) = 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.</p>				

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