

Annexure B

Technical Evaluation Matrix

For the Provision of Travel Management Services to the CSIR for a period of Five (5) years

RFP No. 3569.1/18/10/2023

The CSIR will review all proposals based only on evidence submitted as part of the proposals submitted. Provide evidence and describe processes where applicable to assist the CSIR with its evaluation. The final interpretation of evidence and proposed solutions resides with the CSIR, and this interpretation will be used as the basis for evaluation against the requirements in Annexure A and the functional criteria as described in this document.

Bidders should note that information provided in the submitted proposals will be reflected in the service level agreement that will be signed with the successful service provider.

The bidders will be evaluated according to the functional / technical evaluation criteria in the table below. Bidders must indicate their ability to do the following and to substantiate as required with supporting documentation:

Main evaluation criteria	Sub criteria <i>All criteria will be scored according to the scoring criteria in this table</i>	Weight	Reference page in bidder's document	Comments
Desktop Technical Evaluation Criteria				
1.	GENERAL	34	To be completed by the bidder	
1.1	<p>Bidder must submit a company profile indicating a minimum of three (3) years' relevant experience (as listed in Annexure A of the RFP) in the travel management services industry focusing on public sector and/or corporate institutions.</p> <ul style="list-style-type: none"> • No submission, irrelevant experience and/or Company profile with less than three (3) years company experience or company provided but the experience is not focusing on public sector and/or corporate institutions. = 0 points • Company profile with 3 years relevant experience but less than 5 years' relevant experience. = 5 points • Company profile with 5 years relevant experience but less than 7 years' relevant experience. = 7 points • Company profile with 7 years or more relevant experience. = 10 points 	10		
1.2	<p>Bidder must submit a minimum of three (3) contactable relevant reference letters where similar travel management services were undertaken. The references must be signed and on the bidder's client's letterhead. These letters must include contract duration, details and volumes of services rendered and the client's review of the bidder's service delivery. Bidder must ensure that the references are in the format prescribed, refer to Annexure C – Reference Letter</p>	6		

Main evaluation criteria	Sub criteria <i>All criteria will be scored according to the scoring criteria in this table</i>	Weight	Reference page in bidder's document	Comments
	<ul style="list-style-type: none"> • No submission or reference letters submitted are not as per above requirements or less than three (3) references provided. = 0 points • Three (3) Contactable relevant reference letters including all of the requirements. = 5 points • Five (5) Contactable relevant reference letters including all of the requirements. = 7 points • More than five (5) contactable relevant reference letters including all of the requirements. = 10 points 			
1.3	<p>Bidder must have capacity to provide a reliable and consistent after-hours and emergency support service to the traveller(s). Bidders are required to provide a Standard Operating Procedure which should detail the process to be followed, how the support is to be accessed by travellers, and if support is available on a 24/7/365 basis.</p> <p>Response must confirm availability of 24/7/365 support system.</p> <ul style="list-style-type: none"> • No Standard Operating Procedure provided or 24/7/365 support system not available. = 0 points • Summarised Standard Operating Procedure provided and doesn't include requirements requested above. = 5 points • Detailed Standard Operating Procedure provided, but • does not comply to all requirements listed above. = 7 points 	8		

Main evaluation criteria	Sub criteria <i>All criteria will be scored according to the scoring criteria in this table</i>	Weight	Reference page in bidder's document	Comments
	<ul style="list-style-type: none"> Detailed Standard Operating Procedure is provided and addresses how the support is to be accessed by travellers and is available on a 24/7/365 basis. = 10 points 			
1.4	<p>Bidder must provide an implementation strategy including:</p> <ul style="list-style-type: none"> ○ handover plan from current incumbent, ○ defining roles, responsibilities and allocating resources, ○ account setup, ○ risk map out, ○ schedule milestones, ○ training plan, ○ change management plan. <p>The strategy must address all the above requirements to ensure that travel services to the CSIR will be implemented without service interruptions and engage the incumbent service provider/s to ensure a smooth transition.</p> <p>The implementation strategy and transition plan must happen within 12 weeks from contract award date.</p> <ul style="list-style-type: none"> • No implementation strategy provided, or implementation strategy and transition plan is more than 12 weeks. = 0 points • Implementation strategy within timelines for implementation and at least detailed information on handover plan and roles and responsibilities. = 5 points • Implementation strategy within timelines for implementation and at least detailed information on handover plan, roles and responsibilities, account setup and risk map out. = 7 points • Implementation strategy within timelines for implementation and meets all requirements listed above. = 10 points 	10		

Main evaluation criteria	Sub criteria <i>All criteria will be scored according to the scoring criteria in this table</i>	Weight	Reference page in bidder's document	Comments
2.	RESERVATIONS	17	To be completed by the bidder	
2.1	<p>Bidder must describe in detail the process they use when booking the most cost-effective and practical air travel routes, domestic and international accommodation, as well as securing car rental and transfers for the traveller. The process/es must demonstrate that the bidder has the ability, understanding, experience, skills, resource & quality measures required to provide the services and provide supporting evidence. Refer to paragraphs 7.2, 7.3, 7.4, 7.5 and 7.6 of Annexure A: Terms of reference for reservation requirements.</p> <ul style="list-style-type: none"> • No process provided to demonstrate the above requirements. = 0 points • Summary or high-level process provided with no supporting evidence provided. = 5 points • Detailed process provided with limited supporting evidence. = 7 points • Detailed process explaining each step provided with supporting evidence or sample, i.e. including but not limited to itinerary confirmation that includes air, car, hotel, confirmation numbers; domestic and international air travel; domestic and international accommodation, car rental and transfers, travel voucher to be issued for Traveller with details, and a sample where the bidders has secured special airline services for traveller(s) including waitlist clearance, special meals, travellers with disabilities. = 10 points 	10		

Main evaluation criteria	Sub criteria <i>All criteria will be scored according to the scoring criteria in this table</i>	Weight	Reference page in bidder's document	Comments
2.2	<p>Bidder must confirm the existence of accommodation arrangements with groupings such as hotel groups, guesthouses, private hotels in each province or national footprint.</p> <ul style="list-style-type: none"> • No confirmation provided. = 0 points • Confirmation provided of accommodation arrangements with at least two (2) hotel groups, private hotels or guesthouses. = 5 points • Confirmation provided of accommodation arrangements with at least three (3) hotel groups, private hotels or guesthouses. = 7 points • Confirmation provided of accommodation arrangements with more than three (3) hotel groups, private hotels or guesthouses. = 10 points 	4		
2.3	<p>Bidder to provide information regarding additional value-added services requested in the paragraph 7.10 of Annexure A and any other additional value-added services.</p> <ul style="list-style-type: none"> • No value-added service provided. = 0 points • Evidence that all the value-added services as per paragraph 7.10 of Annexure A can be provided. = 5 points • Evidence that all the value-added services as per paragraph 7.10 of Annexure A plus two (2) more value-added services can be provided. = 7 points 	3		

Main evaluation criteria	Sub criteria <i>All criteria will be scored according to the scoring criteria in this table</i>	Weight	Reference page in bidder's document	Comments
	<ul style="list-style-type: none"> Evidence that all the value-added services as per paragraph 7.10 of Annexure A plus four (4) more value-added services can be provided. = 10 points 			
3.	COMMUNICATIONS	10	To be completed by the bidder	
3.1	<p>Bidder to describe process and anticipated turnaround times for finalisation of quotes, itineraries, flight tickets, bookings, vouchers etc, once final instruction / request has been given / submitted to TMC by the CSIR.</p> <ul style="list-style-type: none"> No process and indication of anticipated turnaround times. = 0 points Process provided, but unclear indication of anticipated turnaround times. = 5 points Process and turnaround time of "next business day" provided. = 7 points Process and turnaround time of "≤/ < four (4) business hours" provided. = 10 points 	7		
3.2	<p>Bidder to provide list of methods of communications that will be used to keep travellers and travel bookers informed of any changes, cancellations and travel information to ensure a smooth continuous workflow.</p> <ul style="list-style-type: none"> No method of communication provided. = 0 points One (1) method of communication provided. = 5 points Two (2) methods of communication provided. = 7 points More than two (2) methods of communication provided. = 10 points 	3		

4.	FINANCIAL MANAGEMENT	12	To be completed by the bidder
4.1	<p>Bidder must describe how a 30-day bill back account facility will be managed with timelines within which account reconciliation statement is provided, rectifying of discrepancies and management of supporting documentation.</p> <ul style="list-style-type: none"> • No submission provided. = 0 points • 30-day bill back account reconciliation with statements provided monthly, rectifying of discrepancies, management of supporting documentation. = 5 points • 30-day bill back account reconciliation with statements provided bi-weekly, rectifying of discrepancies, management of supporting documentation. = 7 points • 30-day bill back account reconciliation with statements provided weekly, rectifying of discrepancies, management of supporting documentation. = 10 points 	4	
4.2	<p>Provide process of managing pre-payment including turnaround times, method of payment, and maximum of pre-payments that can be done on a daily basis (number and amount). The evidence provided must include proof of traveller's request, approval of request, pre-payment and voucher.</p> <ul style="list-style-type: none"> • No process provided. = 0 points • Process and evidence provided that pre-payment can be done within 5 business days. = 5 points • Process and evidence provided that pre-payment can be done within 2 business days. = 7 points • Process and evidence provided that pre-payment can be done on the same day. = 10 points 	4	
4.3	<p>Bidder must describe the lodge card invoicing process, including consolidation of statements, rectifying of discrepancies, management of supporting documentation etc.</p> <ul style="list-style-type: none"> • No process provided. = 0 points 	4	

	<ul style="list-style-type: none"> Invoicing process and lodge card reconciliation statements showing the rectification of discrepancies done monthly are provided. = 5 points Invoicing process and lodge card reconciliation statements showing the rectification of discrepancies done bi-weekly are provided. = 7 points Invoicing process and lodge card reconciliation statements showing the rectification of discrepancies done weekly are provided. = 10 points 		
5.	GEOGRAPHICAL FOOTPRINT	4	To be completed by the bidder
5.1	<p>Bidder and/or through partnerships must describe their Global / Geographical reach and footprint in the following regions: North America, Central America & Caribbean, South America, Europe, Africa, Oceania, Asia.</p> <ul style="list-style-type: none"> No Global / Geographical footprint or reach = 0 points Global / Geographical reach and footprint in less than six (6) regions = 5 points Global / Geographical reach and footprint in at least six (6) regions = 7 points Global / Geographical reach and footprint covering all regions = 10 points 	4	
6.	RESOURCES	15	To be completed by the bidder
6.1	<p>Bidder must submit an organogram with key positions clearly listed including roles and responsibilities that will fulfil the CSIR requirements as stipulated in Annexure A's paragraph 7. Roles and responsibilities of key positions to be included as per paragraph 7.19: Office Management in Annexure A. No CV's needed.</p> <ul style="list-style-type: none"> No organogram or overview of supplier management submitted. = 0 points Organogram provided with no roles and responsibilities defined. = 5 points 	15	

	<ul style="list-style-type: none"> • Organogram provided with some roles and responsibilities defined. = 7 points • Organogram with all key positions provided with roles and responsibilities clearly defined. = 10 points 			
7.	SELF-BOOKING TOOL	8	To be completed by the bidder	
7.1	<p>Bidder must provide the following:</p> <ol style="list-style-type: none"> Evidence that they can implement a self-booking tool that will be able to deliver the user requirements as per Annexure A1 -Terms of reference, section 7.2(b) (7.18). Evidence of adherence to user requirements must be provided in the form of screenshots. Signed Declaration of Conformance as an undertaking that their SBT will integrate with CSIR systems. <ul style="list-style-type: none"> • No confirmation of SBT and/or Declaration of Conformance not signed. = 0 points • Confirmation that a SBT can provide all of the requirements listed in 7.18 with no supporting evidence provided and Declaration of Conformance has been signed. = 5 points • Confirmation that a SBT can provide all of the requirements listed in 7.18 with limited supporting evidence provided and Declaration of Conformance has been signed. = 7 points • Confirmation that a SBT can provide all of the requirements listed in 7.18 with supporting evidence and Declaration of Conformance has been signed. = 10 points 	8		
<p>Only bidders who achieved a minimum threshold of 50% on each individual evaluation criterion, and a minimum threshold of 70% overall on the Functional/Technical Evaluation Criteria will qualify and be considered for further evaluation.</p>				