

Annexure B

Technical Evaluation Matrix/Rubrics

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

RFP No. 3569/29/05/2023

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	38	To be completed by the bidder	
1.1	<p>Bidder must submit a complete company profile including information that will describe their service offering and complete customer information table in paragraph 8.20 of Annexure A: Customer information. The company profile must indicate the number of years' experience in the travel industry focusing on public sector and/or corporate institutions.</p> <ul style="list-style-type: none"> No submission or Customer information form not completed or Company profile with less than three (3) years company experience = 0 points Company profile with 3 years to less than 7 years' experience with completed customer information = 5 points Company profile with 7 years and above experience with completed customer information = 10 points 	10		
1.2	<p>Bidder must submit 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 value, contract duration, details of services rendered and the client's review of the bidder's service delivery-</p> <ul style="list-style-type: none"> No submission or reference letters submitted are not as per above requirements = 0 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
	<ul style="list-style-type: none"> • Two (2) Contactable relevant reference letters including all requirements = 5 points • Three (3) or more contactable relevant reference letters including all requirements. = 10 points 			
1.3	<p>Bidder must have capacity to provide a reliable and consistent after-hours support/customer support to traveller(s). Bidders are required to provide Standard Operating Procedure of after-hours support which should address at least the following, how the support is to be accessed by Travellers, where it is located, centralised/regionalised, in-country (South Africa), owned/ outsourced etc. and if available on a 24/7/365 basis.</p> <ul style="list-style-type: none"> • No capacity and/or No Standard Operating Procedure of after-hours support provided = 0 points • Two (2) consultants and Standard Operating Procedure of after-hours support provided = 5 points • At least three (3) consultants and Standard Operating Procedure of after-hours support provided = 10 points 	5		
1.4	<p>Bidder must describe their approach and demonstrate how quickly they would respond to emergency requests and reporting of such emergencies.</p> <ul style="list-style-type: none"> • No submission = 0 points • Emergency requests responded after two (2) hours = 5 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"> Emergency requests responded within one (1) hour= 10 points 			
1.5	<p>Bidder must provide an Implementation Strategy including a detailed transition, timelines and training plan (<i>inter alia</i> the Kick-off plan, Full roll-out plan, Detailed training plan and Detailed change management plan) for implementing travel services to the CSIR, without service interruptions and engagement with incumbent service provider/s to ensure a smooth transition.</p> <ul style="list-style-type: none"> No Implementation Strategy provided = 0 points Implementation Strategy within timeline of six (6) weeks = 5 points Implementation Strategy within timeline of four (4) weeks = 10 points 	10		
2.	RESERVATIONS	15	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 routing, 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 8.2, 8.4, 8.5 and 8.6 of Annexure A: Terms of reference for reservation requirements.</p> <ul style="list-style-type: none"> No process or supporting evidence provided to demonstrate the above requirements. = 0 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"> • Summary or high-level process provided and no supporting evidence provided. = 5 points <p>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</p>			
2.2	<p>Bidder must detail and provide their arrangements with accommodation groupings such as hotel groups, guesthouses, private hotels in each province or national footprint. Proof of arrangement must be provided.</p> <ul style="list-style-type: none"> • No arrangement or proof of arrangement provided = 0 points • Proof of arrangement with two (2) accommodation groupings provided as per above requirements = 5 points • Proof of arrangement with => three (3) accommodation groupings provided as per above requirements = 10 points 	4		
2.3	<p>Bidder to provide information regarding additional value-added services requested in the paragraph 8.10 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 some of the listed value-added services can be provided = 5 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 listed value-added services can be provided plus additional value-added services = 10 points 			
3.	COMMUNICATIONS	7	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 / unclear indication of anticipated turnaround times. = 0 points Process and turnaround time of "next business day" provided. = 5 points Process and turnaround time of "≤/ < four (4) business hours" provided. = 10 points 	4		
3.2	<p>Bidder to describe and provide samples of the method of communication 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 and sample provided = 5 points Two (2) or more methods of communication and sample provided = 10 points 	3		
4.	FINANCIAL MANAGEMENT	9	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.</p> <ul style="list-style-type: none"> No submission provided = 0 points 30-day bill back account facility provided monthly = 10 points 30-day bill back account facility provided weekly = 10 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
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 • Evidence provided that pre-payment can be done within 2 business days = 5 points • Evidence provided that pre-payment can be done on the same day = 10 points 	3		
4.3	<p>Bidder must describe the process that will be followed to ensure that all rebates and commissions earned on behalf of the CSIR will be recorded and returned to the CSIR on a quarterly basis. Bidder must also describe the invoicing process, including consolidation of statements, management of lodge card, rectifying of discrepancies, management of supporting documentation etc.</p> <ul style="list-style-type: none"> • No process provided = 0 points • High-level or summary process provided = 5 points • Detailed process with clear timelines provided = 10 points 	3		
5.	ACCOUNT MANAGEMENT	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 reach and footprint in all regions = 0 points • Global / Geographical reach and footprint in at least six areas = 5 points • Global / Geographical reach and footprint covering all regions = 10 points 	4		

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
6.	INFRASTRUCTURE, RESOURCES AND TECHNOLOGY	12	To be completed by the bidder	
6.1	<p>Bidder must submit an organogram with key positions provided clearly listed and a detailed explanation on the structural design that will fulfil the CSIR requirements as per Annexure A and according to the figures provided in paragraph 7 of Annexure A. Key responsibilities of all positions with key positions as per paragraph 8.19: Office Management to be included. Bidder must also provide an overview of their capability to perform supplier (sub-contractors) management (e.g., airline relationships, hotel group management etc).</p> <ul style="list-style-type: none"> • No organogram or overview of supplier management submitted = 0 points • Organogram with some positions provided and only high-level responsibilities explained and high-level overview of supplier management submitted = 5 points • Detailed organogram with key positions provided, including detailed responsibilities of positions detailed supplier management process = 10 points 	12		
Only bidders who achieved a minimum threshold of 50% on each individual evaluation criterion, and a minimum threshold of 70% overall on the Desktop Technical Evaluation will qualify and be considered for Supplier Presentations.				
7.	PRESENTATION	15	To be completed by the bidder	
7.1	<p>Bidder presentation must not exceed 60 minutes.</p> <ul style="list-style-type: none"> • Systems Development (Weight 15) <p>Demonstration of Self-Booking Tool = (Weight 5)</p> <p>Bidder must indicate if they have their own or have an arrangement to use an SBT which can be integrated with Oracle based EBS system, with contactable</p>	15		

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
	<p>reference/s, preferably on a cloud based SBT. Refer to questionnaire on SBT. (Annexure C)</p> <ul style="list-style-type: none"> • No submission and demonstration of SBT = 0 points • Proof provided and demonstration of own or access to an SBT which can be integrated with Oracle based EBS system = 5 points • Proof provided with contactable references and demonstration of own or access to a cloud based SBT which can be integrated with Oracle based EBS system for all travel management services (Flight, accommodation, car, transfers/shuttle) and how SBT can be accessed by Travel Bookers = 10 points <p>Demonstration of Mobile Application = (Weight 5)</p> <ul style="list-style-type: none"> • No demonstration of Mobile Application = 0 Points • Demonstrate some of the services as listed on paragraph 18.15 on Annexure A provided on the Mobile Application = 5 Points • Demonstrate all the services as listed on paragraph 18.15 on Annexure A provided on the Mobile Application = 10 Points <p>Demonstrate the traveller tracking system = (Weight 5)</p> <ul style="list-style-type: none"> • No traveller tracking system demonstrated = 0 Points • Demonstrate some of the services as listed on paragraph 18.15 on Annexure A provided in the traveller tracking system = 5 Points • Demonstrate all the services as listed on paragraph 18.15 on Annexure A provided in the traveller tracking system = 10 Points 			

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
<p>The minimum functional threshold for presentation evaluation criteria is 75%. Bidders who score less than this threshold will be disqualified and not be considered for any further evaluation.</p>				