



UNIVERSITY OF THE  
WITWATERSRAND,  
JOHANNESBURG

## PROCUREMENT DOCUMENT

FOR

### RFP FOR TRAVEL MANAGEMENT SERVICES TENDER

<b>Reference No.:</b>	Wits 2023:04	
<b>Description:</b>	<b>TRAVEL MANAGEMENT SERVICES TENDER</b>	
<b>Issue Date:</b>	02 July 2023	
<b>Issued by:</b>	Procurement Services	
<b>Submission Date and Time:</b>	Date: 26 July 2023	Time: 23h59

Tenderers have the option to tender for all Service Component(s) or indicate their preferred option/s:

<b>Component1: Traditional travel management services including the provision of an online booking tool</b>	Tenderers to indicate their selection in Annexure B: Returnable schedule
<b>Component 2: Specific complex large group bookings for Wits Business School</b>	Tenderers to indicate their selection in Annexure B: Returnable schedule

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<b>ATTACHMENTS:</b>	
List of Annexures	Description of Annexures
Annexure A	Scope of Work
Annexure B	Procurement Returnable Schedules
Annexure C	Pricing Schedule
Annexure D	Reference Template
Annexure E	Draft Contract

## PART A: TENDER OVERVIEW

### 1 TENDER OUTLINE

#### 1.1 University's Background

The University of the Witwatersrand, Johannesburg (the “**University**”) is a leading university in Africa, as reflected by its international standing and the quality of its graduates, many of whom have played a major role in founding industries in South Africa, including sectors such as mining, financial services and information technology. The University prepares students for managerial, professional and leadership positions in the public, private and non-governmental sectors. The University has more than 30000 students and approximately 6500 staff and is one of the biggest sources of skills in Africa.

#### 1.2 Invitation to Tender

1.2.1 The Procurement Department of the University of the Witwatersrand, Johannesburg request proposals from experienced and suitably qualified Travel Management Service Providers (TMC) to respond to this tender for the Provision of Travel Management Services for the University.

#### 1.3 Tender Background

The University intends to appoint a service provider(s) that it can work well with and have a cooperative relationship to help the University community. The ideal service provider(s) must focus on providing travel services while being proactive and innovative in finding ways to save costs. They should also be aware of and respectful towards the University's needs and culture. A crucial factor in selecting a service provider(s) will be whether the University believes they can establish a close working relationship with them, to benefit the students and staff.

#### 1.4 Overview

1.4.1 Each service component has its own Scope of Work that contains detailed requirements of the University.

1.4.2 The successful tenderer(s) chosen by the University must provide advice on how to reduce costs and use resources efficiently for the Services they will provide. They must also provide detailed recommendations on how to achieve this.

#### 1.4.3 **Component 1: Traditional including the provision of an online booking tool (Refer to Annexure A for detailed Scope of Work)**

The University intends to appoint a panel of Travel Management Companies (TMCs) to provide a comprehensive end-to-end travel management service to facilitate International, Regional & Domestic air travel and accommodation bookings, car rental and shuttle services, visa services and group bookings.

One successful TMC will be selected from the panel of providers, to provide online travel bookings for flights, hotel accommodation and car hire primarily for domestic travel arrangements and non-complex international travel, via a booking tool.

#### 1.4.4 **Component 2: Specific complex large group bookings for Wits Business School (Refer to Annexure A for detailed Scope of Work)**

A TMC will be appointed to provide end-to-end travel management services for group bookings where bookings are required for approximately more than 20 travellers travelling to multiple destinations. The volume of travellers may range from approximately 10 to 400 travellers per annum.

The TMC must provide a personalised service to facilitate specific, complex large group bookings and bespoke travel requirements for local, regional and international study programmes for Wits Business

School when requested to do so.

The current high-volume travel spend categories per annum for the period 2019 versus 2022 are as follows:

Service Category	Estimated number of transactions per annum	
	2019	2022
Air travel Domestic	2713	1831
Air Travel Int	2471	1626
Accom	1943	1378
Transfer/Rail/Bus	587	627
Visas	195	116
Tours	87	85
Conference	101	146
Car Hire	5257	664
	<b>13354</b>	<b>6473</b>

Note: These figures are estimates based on the current trends and may change during the tenure of the contract. These figures are meant to assist the bidders when preparing their proposals and are not guaranteed.

#### 1.5 Tender Description

The primary operational objective is to appoint a reputable service provider to provide the University is as follows:

- 1.5.1 provide the University with end-to-end travel management services that are consistent and reliable and in line with our travel policy.
- 1.5.2 facilitate comprehensive International and Domestic travel bookings, (air and accommodation) including large group travel, visas, car hire and transfers during business hours and facilitate after-hours emergency requests particularly related to travel changes.
- 1.5.3 to provide expert advice on travel and trip organisation and planning based on their industry knowledge of particular countries and specific logistical or regulatory challenges that may need to be considered to address global travel risk management (e.g. health warnings, weather warnings, vaccination requirements, visa information, travel or country alerts, airline and airport rules and regulations, airline baggage policies, airline flight changes etc.); and to keep abreast with new travel trends and value adds within the industry e.g. Supplier updates, Travel alerts, industry trends and dependencies etc.
- 1.5.4 provide cost-effective, practical travel options and enable cost savings for the University. The TMC must endeavour to provide the most cost-effective travel arrangement as an option and to utilise negotiated discounted fares and rates where possible (University, Purco or their own consortia rates).
- 1.5.5 To provide the University with a high level of traveller satisfaction in line with service levels including advising on practical routing options.
- 1.5.6 Appoint TMCs who have a proper check and balance process in place with minimal manual intervention to facilitate travel lodge card reconciliation and timeous payment thereof and to consolidate all invoices from third-party suppliers related to the travel requests.
- 1.5.7 Appoint TMCs that are technologically savvy and innovative to meet the real-time, mobile requirements of part of the customer base.
- 1.5.8 Appoint TMCs to handle travel emergencies (e.g. changes) and support travel safety through duty of care and provide a 24/7 after-hours support service for emergency changes.

- 1.5.9 Effectively manage supplier partnerships and meet the demands of the changing travel environment.
- 1.5.10 Refer to Annexure A: Scope of Work for a detailed description of the requirements.

**1.6 Procurement Strategy**

Note: Different contracts may be recommended/concluded for each service component:

- 1.6.1 This is a Public (Open) Tender to be published for an offsite TMC service with the strategy to appoint at a panel of at minimum two (2) service providers who will have the capacity to satisfy the requirements as stipulated in the SoW (scope of work) in Annexure A.
- 1.6.2 One tenderer from the panel of providers will be appointed to provide an online booking tool service as well as the traditional TMC services.
- 1.6.3 One tenderer will be appointed to facilitate large group bookings for Wits Business School.
- 1.6.4 The contract period is proposed to be 5 years.
- 1.6.5 The University strictly prohibits any joint ventures or partnerships for this provision of this service. However, subcontracting is allowed, on condition that the subcontractor does not provide more than 49% of the required services. It is important to emphasise that the University does not intend to directly engage in a contract with the subcontractor, and the Tenderer assumes full responsibility and liability in this regard. The subcontracted party must meet the procurement eligibility criteria specified in the Tender Documents. Tenderers are required to submit the duly signed subcontracting agreement as a mandatory returnable schedule, clearly defining the roles and responsibilities of the subcontracted party in relation to the services they will provide. The suitability and role of the subcontracted party will be thoroughly evaluated to determine their acceptability and if the associated risk is deemed excessively high or the role is deemed as inappropriate, the Tender Submission may be disqualified.

**1.7 Note Regarding Pricing**

To ensure the accuracy of your Tender Submission for this Tender, it is imperative that Tenderers price each component in accordance with the Tender Documentation. Please note that being awarded one service component does not guarantee that a Tenderer will be awarded more or all of them. Therefore, Tenderers must kindly refrain from providing an all-inclusive price that encompasses all service components. Each service component must be priced separately. Additionally, the University reserves the right to appoint a panel of providers for certain service components as outlined herein, and there is no guarantee of a minimum amount of work. It is advisable for Tenderers carefully review the tender documentation and consult with financial experts before submitting pricing.

**1.8 Pre-qualification Criteria**

- 1.8.1 Tenderers who have suitable experience and demonstrated capacity in the required work activities in Travel Management Services may be eligible to partake in this Tender.
- 1.8.2 Only Tenderers who satisfy the pre-qualification criteria as set out in the table below should submit a Tender Submission, failure to do so will result in disqualification.
- 1.8.3 The Tenderer must submit all the information required below in the Schedules:

No.	Procurement Mandatory Criteria
	<b>Procurement Mandatory Criteria for ALL components</b>
	It is compulsory that the Tenderer must:
1.	provide the Schedule 1: Signed Submission which must be signed by a duly authorised representative
2.	provide proof of their legal entity's registration documentation (e.g. CIPC) indicating the date of registration/incorporation, list of directors, partners, and members for South African entities
3..	provide audited company financial statements for the past 3 (three) years in line with the Companies

	Act. The Financial Health – Audited financials will be assessed to determine the financial health of the company. This will impact the financial risk assessment and the tenderer's evaluation.
4.	provide a current and valid Tax Clearance certificate/PIN
5.	provide Vat registration details. Provide rationale if not Vat registered.
6.	provide a (current) Letter of Good Standing from its bankers and/or bank confirmation letter.
7.	be a South African entity with a Gauteng presence.
<b>Functionality (including Technical) Mandatory Criteria</b>	
<b>All Components</b>	
	It is compulsory that the Tenderer must:
8.	have valid and current industry-related licenses/certificates and has current IATA and ASATA certification and provide evidence thereof.
9.	provide evidence demonstrating a minimum of 5 years experience of supply of Travel management services for domestic and international travel of a similar nature, scale and value to those required by the University. Provide your company profile including your website link, key clients and history and a description of the services provided. The University may request a client reference to support the minimum 5-year track record. Your track record will be assessed for acceptability and appropriateness.
10.	provide evidence that they can provide a 24 hour, 7 days a week service for emergency travel requests/assistance (evidence of an after-hours service). This must be a current service that has stabilised and has been in use for at least a year. The University may request a client reference to support this.
11.	provide at minimum three client references, as per Annexure B: Schedule 5, where you have implemented a travel lodge card. At minimum one reference must indicate that the tenderer has the experience of managing this for a client where the annual travel spend exceeds R15 million for Component 1. At minimum one reference must indicate that the tenderer has the experience of managing this for a client where the annual travel spend exceeds R5 million for Component 2. References will be assessed for relevancy and acceptability. References must be for travel services provided within the last 5 years where a travel lodge card is provided (pre-Covid 19). At least one of the references must be deemed as acceptable.
12.	must ensure that their pricing as per Annexure C is provided and addresses the full scope of work.
<b>Component 1 (Traditional including the provision of an online booking tool)</b>	
13.	provide at minimum three <b>acceptable</b> references, as per Annexure B: Schedule 5, where they have supplied Travel management services for domestic and international travel of a similar nature, scale and value to those required by the University. At least one reference must be for a client for whom the tenderer has serviced travel requests of more than R15 million per annum. References must be for travel services provided within the last 5 years (pre-Covid 19). References will be assessed for relevancy and acceptability.
14.	provide at minimum two references, as per Annexure B: Schedule 5, where the tenderer has implemented the online booking tool that they are proposing. Reference must be within the last three years. References will be assessed for relevancy and acceptability. At least one of the references must be deemed as acceptable.
15.	The proposed online booking tool must be in use for at least a year at one of the referenced clients indicated above.
<b>Component 2 (Specific complex large group bookings) for Wits Business School</b>	
16.	provide at minimum two references, as per Annexure B: Schedule 5, where they have supplied Travel management services for domestic and international travel of a similar nature, scale and value to those required by the University. At least one reference must be for a client where the tenderer has serviced group travel requests for a total of at least R1 million per annum. References must be for

	travel services provided within the last 5 years (pre-Covid 19). References will be assessed for relevancy and acceptability. At least one of the references must be deemed as acceptable.
17.	provide at minimum two references with at minimum one reference indicating that the tenderer has serviced group bookings for a minimum group size of 50 people (preferably higher) where complex international travel arrangements have been facilitated. One of the references should be related to organising international travel arrangements for academic purposes. References must be for travel services provided within the last 5 years (pre-Covid 19). References will be assessed for relevancy and acceptability. At least one of the references must be deemed as acceptable. Provide the information as per Annexure B: Schedule 5.
18.	The Group Travel Consultant (GTC) must be a senior resource with appropriate experience in the travel sector, with a minimum of seven years experience in the sector. The resource must have at minimum five years experience as a senior travel consultant/resource and minimum two years of experience facilitating group travel. Provide the CV of the consultant to show evidence that this requirement is supported.
19.	the dedicated GTC must be available 24 hours/7 days a week during group travel duration periods and in peak periods.

1.8.4 The Tenderer's attention is drawn to the pre-qualification criteria which require the Tenderer to provide the necessary evidence (please refer to Annexure B: Returnable Schedules) to be eligible, failure to do so will result in disqualification.

1.8.5 Tenderers who fail to provide the required schedules and documents will not have their Tender Submissions evaluated further.

1.8.6 Despite the above, the University reserves the right to request additional information (which must be responded to and/or provided to the University within the period as determined and communicated by the University) where the information provided yields insufficient detail and Tenderer differentiation.

## 1.9 Tender Terms and Conditions

1.9.1 The [Tender Terms & Conditions](#) apply to and form an integral part of this Tender.

Full link: <https://www.wits.ac.za/media/wits-university/footer/about-wits/procurement/Tender%20Terms%20%20Conditions%2015.08.2020.pdf>

1.9.2 Words and phrases defined in the Tender Terms & Conditions shall also apply in the interpretation of the same words and phrases in this Tender, save where specifically otherwise indicated.

## PART B: KEY INFORMATION

### 2 TENDER TIMELINE

2.1 The table below lists key events, dates, and periods applicable to this Tender:

No.	Description	Date	Time
1.	Invitation to Tender notice release via print media	02 July 2023	
2.	Publication of Tender available on the University's Procurement website	04 July 2023	
3.	The due date for the Tenderer to register for the tender. <b>Note this is a compulsory step. No late registrations will be accepted after this time.</b>	10 July 2023	23h59

4.	Briefing session details	Non Compulsory Briefing Meeting: OnlineDate and time:  Microsoft Teams:	11 July 2023   14h00 to 15h00  The link to the session will be made available to all Tenderers that register timeously
6.	Submission Date and Time	26 July 2023	23h59
7.	Presentation Date and Time	14-15 August 2023	11h00

2.2 These dates and times do not create an obligation on the part of the University to take any action or create any right for a Tenderer to demand that the University executes a certain action on a specific date at a certain time.

2.3 In accordance with section 6 of the Tender Terms and Conditions, the University may issue amendments until 3 (three) Business Days before the Submission Date and Time.

### 3 INTENT TO SUBMIT A TENDER SUBMISSION AND COMPULSORY TENDERER REGISTRATION

3.1 Prior to the submission of any returnable schedules, documents or other information as set out in the Tender Documents, the Tenderer **must** submit to Sharon Pillay [Sharon.Pillay@wits.ac.za](mailto:Sharon.Pillay@wits.ac.za) and copy Wits Tender Admin at [admin.tenders@wits.ac.za](mailto:admin.tenders@wits.ac.za) (see section 3.1) in a single email, on or before the time indicated in section 2.1, the Tenderer's written statement of intention to partake in the Tender.  
Note: The compulsory registration date is **10 July 2023**.

### 4 UNIVERSITY CONTACT INFORMATION

Queries relating to the issue of the Tender Documents must be addressed to the Tender Administrator at [admin.tenders@wits.ac.za](mailto:admin.tenders@wits.ac.za) and to (Sharon Pillay – Category Manager) via e-mail: [Sharon.pillay@wits.ac.za](mailto:Sharon.pillay@wits.ac.za)

### 5 DEVELOPING YOUR TENDER SUBMISSION

5.1 The Tender Documents set out the step-by-step process and conditions that apply.

5.2 Tenderers should take time to read and understand the Tender Documents, in particular:

5.2.1 the Tender Terms & Conditions.

5.2.2 the Tender Submission protocol (please refer to section 6);

5.2.3 develop a strong understanding of the University's Scope of Work detailed in Annexure A;

5.2.4 in structuring your Tender Submission consider how it will be evaluated, Part C: The Evaluation Process of this document describes the evaluation approach;

5.2.5 important checklists are included in Annexure B: Returnable Schedules and Documents to assist Tenderers with the completion of their Tender Submission. Tenderers are required to tick the relevant boxes for verification purposes. Where information is not applicable, the symbols N/A must be inserted in the space provided.

5.3 Tenderers are advised to check the number of pages and should any be missing or duplicated, or the reproduction indistinct, or any descriptions ambiguous, or this document contain any obvious errors they shall inform the persons listed in Section 4 above.

5.4 The University will respond to requests for clarification received up to 5 (five) Business Days before the Submission Date and Time. Queries should be by email to [admin.tenders@wits.ac.za](mailto:admin.tenders@wits.ac.za) and



[Sharon.pillay@wits.ac.za](mailto:Sharon.pillay@wits.ac.za)

- 5.5 Please note that additional information supplied to anyone Tenderer may also be provided to other Tenderers via e-mail.
- 5.6 It must be noted that the University shall not be held liable for any loss or damage incurred to the Tenderer should the Tenderer fail to fulfil the requirements of the Tender.

## 6 SUBMITTING YOUR TENDER SUBMISSION

- 6.1 Tender submissions will be electronic via the [admin.tenders@wits.ac.za](mailto:admin.tenders@wits.ac.za) email. No hard copy, faxed, physical submissions or e-mailed submissions will be accepted by the University:
- 6.2 The mode of delivery for submission is set out below and will apply to this Tender:
- 6.3 Electronic Submissions:
- 6.3.1 The [Electronic Submission Protocol](#) will apply to this Tender.

Full Link:

<https://www.wits.ac.za/media/witsuniversity/footer/aboutwits/procurement/Electronic%20Submission%20Protocol%2015.08.2020.pdf>

- 6.4 Tenderers are urged to contact the University's Procurement Representative if unsure which mode of delivery applies to the Tender. The University will not be held responsible where the Tenderer incorrectly interprets the mode of delivery.

## PART C: THE EVALUATION PROCESS

### 7 EVALUATION METHODOLOGY

- 7.1 The University will apply a multi-criteria approach in evaluating the prospective Tender Submissions. It is envisaged that the following core criteria (not complete and in order of preference) will amongst others form the basis of the tender evaluation:
- 7.1.1 The financial offer.
- 7.1.2 The Tenderer's ability to match service requirements as set out in Annexure A: Scope of Work and adequate client liaison.
- 7.1.3 The type of organisation and the number of years in operation in the industry.
- 7.1.4 The track record and experience of the Tenderer.
- 7.1.5 The Tenderer's contactable client references.
- 7.1.6 The competence of the proposed management, project managers and staff of the Tenderer.
- 7.1.7 Accuracy and presentation of the calculations which must be sufficient for comparison purposes.
- 7.1.8 Financial ability of the Tenderer to provide the goods and/or services and to meet its contractual obligations.
- 7.1.9 Adequate insurance coverage regarding the goods and/or services.
- 7.2 **Evaluation Procedure:**
- 7.2.1 The evaluation phase includes the prequalification phase for procurement, technical and functional elements.
- 7.2.2 The University may request additional information, clarification, or verification in respect of any information contained in or omitted from a Tenderer's Tender Submission and this information will be requested in writing.

- 7.2.3 The University may enforce whatever measures it considers necessary to ensure the confidentiality and integrity of the contents of the Tender.
- 7.2.4 The University will evaluate the proposals with reference to the University's set and approved evaluation criteria and protocol as indicated in these Tender Documents.
- 7.2.5 Tenderers are urged to study the information provided in detail before responding to the Tender. It is of utmost importance that the information and conditions set out in this specification and "Tender Forms" be completed and submitted in the indicated format and order. Should the information not be submitted in the required format, the University reserves the right not to assess the Tender received and to disqualify such Tender Submissions. Preferences are offered to Tenderers that are Broad-Based Black Empowerment Contributors.

## 8 EVALUATION CRITERIA

### 8.1 Stage 1: Pre-qualification Stage (Procurement Mandatory Criteria & Functionality Criteria)

- 8.1.1 The University has a defined minimum pre-qualification listed in the table under section 1.6.4 that must be met by the Tenderer for the University to accept the Tender Submission for evaluation.
- 8.1.2 The pre-qualification evaluation will be carried out by the University's tender evaluation committee members to determine which Tender Submissions are compliant or non-compliant with the requirements issued by the University as part of this tender process.
- 8.1.3 Where there is failure to comply with the pre-qualification criteria as set out in section 1.8 or the University is for any reason unable to verify whether the pre-qualification criteria are fully complied with, the University may disqualify the Tender Submission.
- 8.1.4 Tenderers that do not meet the pre-qualification criteria may not advance to the next stage of evaluation.
- 8.1.5 Please note that no points are allocated at this stage.
- 8.1.6 **Note:** Documents submitted in support of this Tender must be documents of the Tenderer's entity. It is not permitted that documents submitted pertain to different companies or business units within a group.

### 8.2 Stage 2: Functional Evaluation including Technical Evaluation for Component 1 Traditional and Online Model

- 8.2.1 In this stage, the Tenderer must score a minimum of 70% to move on to the next stage of evaluation as per the pre-qualification requirement.
- 8.2.2 The University may elect only to invite the top-ranked 7 (seven) Tenderers for further evaluation stages demos/presentations for Component 1. The top seven tenderers will be shortlisted based on the below-proposed functionality criteria for Component 1.

No	Functionality Criteria – Component 1	Weighting
1.	<b>Track Record/Management and Capability</b>	<b>45 points</b>
	a) Experience in servicing tertiary institutions/higher education dealing with academic traveller requirements or student requirements.	1
	b) Years and scale of experience in providing a full travel management service. Show evidence that you have 5 or more years experience providing a full travel management service with at least one annual travel contract value being more than R15 million or more. The greater the years of experience and the greater the annual value of the contracts managed, will result in a greater score.	10
	c) Provide your checklist for international travel requests. The more information provided, the greater the score. The thoroughness of the checklist for travellers with complex international	3

	travel requirements. Provide your checklist for travel from Joburg to at least two international destinations in the same trip as an example. The more complete the checklist, the greater the score.	
	d) Provide reference letters/completed reference template, 6 or more positive references are recommended. The more positive references, the greater the score. References will be assessed for acceptability and relevancy and may be confirmed. References must be in line with the provision of a full travel management service. At minimum three of the references must be related to the end-to-end travel management services you have provided (bookings for air, accommodation, car hire/transfers etc.).	10
	e) Provide reference letters/completed reference template, 2 or more positive references are recommended. for the implementation of the booking tool, you are proposing. The more positive references, the greater the score. References will be assessed for acceptability and relevancy and may be confirmed.	5
	f) Provide your SOP-standard operating procedure/workflow diagram to indicate how you manage domestic and international reservations/ bookings and how the Client's travel policy engages with that	5
	g) Provide your procedure related to how refunds and non-refundable airline tickets are handled including but not limited to how unused and cancelled air tickets be handled. This includes timelines related to processing and communication with the relevant stakeholders.	3
	h) Describe the Reconciliation/matching process conducted to promote adequate controls and mitigate risks and ensure that the lodge card statement/account has the relevant referencing information (e.g. order and invoice information). Indicate how flights, accommodation and shuttle invoices are dealt with in terms of the swyping of the lodge card. Include the key steps followed and associated timelines to ensure that invoices are supported with relevant matching order information and provided in good time to allow for timeous payment of the lodge card. What happens if the invoice initially does not match the order value? What are your proposed steps to resolve this so that payment is not impacted and to ensure that payment is correct and matching the order.	5
	i) Provide your procedure related to how after-hours requests are handled including the steps followed, escalations etc. to ensure that the travellers do not experience undue risks or that unauthorised bookings are not confirmed. Indicate if this is an in-house or outsourced service.	3
<b>2.</b>	<b>Capacity and skills of resources</b>	<b>8 points</b>
	a) Skills and experience of the Account manager. The Account manager should have at minimum 3-5 years of relevant experience in the travel industry. The greater the years of experience and skill level, the greater the score.	3
	b) Provide an Organogram of the team that would be supporting the Wits account if you were awarded the contract, taking into account the complexity and scale related to Wits travel requirements. Indicate the level of experience of each of the proposed members of the support team and the seniority of the team. In addition, indicate the resource backup plan to ensure business continuity. A senior consultant of at least 5 years experience should be assigned to the account with additional resources for support/backup. Include information related to the capacity and employee size of the company including the volume of senior consultants and key members (account managers etc.).	5

<b>3.</b>	<b>Online Booking Tool Exposure</b>	<b>10 points</b>
	a) Indicate the number of years experience with an Online Model showing a minimum of 2 positive references utilising your online tool	5
	b) Indicate Tool independence (platform independence)	1
	c) Indicate how the tool is supported and how new development is dealt with. Is Support in-house or outsourced? What is the length of the engagement if outsourced?	2
	d) Indicate whether the tool you are proposing has been integrated into an ERP solution. If so which one and at what level? The University has an Oracle ERP solution.	2
<b>4.</b>	<b>Quotation format</b>	<b>3 points</b>
	Provide an example of a quote format for air booking. The University prefers capturing the airport taxes separately, hence the request for a quote format indicating the breakdown of costs, service fees and the taxable and non-taxable elements. The VAT total and Service fee must be displayed separately. The quote format will be considered for acceptability. If deemed as unacceptable, this may impact on a risk assessment and your evaluation status.	3
<b>5.</b>	<b>Technology and Cost savvy</b>	<b>14 points</b>
	a) Is the TMC keeping up with the latest technologies such as Travel apps to assist the traveller to track his travel request, innovative mobile apps etc.	2
	b) Does the TMC have steps in place to enable them to compete with internet pricing with possibly matching online rates and indicate if TMC has access to consortia pricing	5
	c) Mobile application usage - Include which platforms you engage with to enable a more efficient, more effective, and seamless traveller, and travel Booker experience and detail what information is shared on the various devices/platform.	5
	d) Willingness to provide VIP assistance for Senior Management with faster turnaround times	2
<b>6.</b>	<b>Group bookings</b>	<b>10 points</b>
	a) Explain your events management/group travel experience. Show evidence of your capacity to handle large group bookings. Provide the years of experience and scale of experience (candidate volume and value of the group travel). Evidence supporting a requirement of facilitating group travel for 10 or more candidates and for an international trip value greater than or equal to one million Rand will result in the highest score for these criteria.	6
	b) Detailed explanation of full management of delegate groups' travel and ground transfers (Domestic/International). A sample plan indicating what is considered when addressing a group travel requirement must be provided.	4
<b>7.</b>	<b>Reporting</b>	<b>5 points</b>
	a) Indication and possible samples of MIS Reporting and reviews, a sample of invoice layout as per compliance schedule and indicated in Annexure 1 including any environmental sustainability elements that can be reported on. b) Indicate any real time reporting capability and any analytics that we would be able to utilise. Ideally this should show trends, whether service levels have been met (KPI tracker), savings incurred and identify potential area for cost savings opportunities.	5
<b>8.</b>	<b>Dependencies / Risks</b>	<b>5 points</b>
	Indicate any dependencies you have and risks, especially any related to the protection of personal information. Indicate how these risks are mitigated. Describe your Business Continuity Plan: How is the TMC address system downtime, load shedding and backup recovery of information, times,	5

	and maintenance period. Provide details of the disaster recovery plan in the event of power failure, technical difficulties or resource unavailability.	
<b>TOTAL POINTS FOR FUNCTIONALITY</b>		<b>100</b>

8.3 **Stage 2: Functional Evaluation including Technical Evaluation for Component 2: Specific complex large group bookings for Wits Business School**

8.3.1 In this stage, the Tenderer must score a minimum of 70% to move on to the next stage of evaluation as per the pre-qualification requirement.

8.3.2 The University may elect only to invite the top-ranked 5 (five) Tenderers for further evaluation stages presentations for Component 2. The top five tenderers will be shortlisted based on the below-proposed functionality criteria for Component 2.

No.	Functionality Criteria – Component 2	Weighting
	<b>Track Record/Management and Capability</b>	<b>50 points</b>
1.	a) Experience in servicing tertiary institutions/higher education dealing with academic traveller requirements or student requirements (3) b) Experience in providing VIP assistance for Senior Management with faster turnaround times (2)	5
	b) Years and scale of experience in providing a full travel management service. Show evidence that you have provided group and corporate travel management services for at least 5 or more years with at least one annual travel contract value being in excess of R1 million or more. The greater the years of experience and the greater the annual value of the contracts managed, will result in a greater score.	10
	c) Provide your checklist for international group travel requests. The more information provided, the greater the score. The thoroughness of the checklist for travellers with complex international travel requirements. Provide your checklist for travel to international destinations in the same trip as an example. The more complete the checklist, the greater the score.	10
	d) Provide reference letters/completed reference template, 2 or more positive references are recommended. The more positive references, the greater the score. References will be assessed for acceptability and relevancy and may be confirmed. References must be in line with the provision of a full group travel management service. At minimum three of the references must be related to the end-to-end travel management services you have provided for group travel (bookings for air, accommodation, car hire/transfers etc.).	10
	e) Provide your SOP-standard operating procedure/workflow diagram to indicate how you manage domestic and international reservations/ bookings for group travel and how the Client's travel policy engages with that.	5
	f) Provide your procedure related to how refunds and non-refundable airline tickets are handled including but not limited to how unused and cancelled air tickets be handled. This includes timelines related to processing and communication with the relevant stakeholders.	2
	g) Describe the Reconciliation/matching process conducted to promote adequate controls and mitigate risks and ensure that the lodge card statement/account has the relevant referencing information (e.g. order and invoice information). Indicate how flights, accommodation and shuttle invoices are dealt with in terms of the utilisation of the lodge card. Include the key steps followed and associated timelines to ensure that invoices are supported with relevant matching order information and provided in good time to allow for timeous payment of the lodge card. What happens if the invoice initially does not match the	3

	order value? What are your proposed steps to resolve this so that payment is not impacted and to ensure that payment is correct and matching the order.	
	h) Provide your procedure related to how after-hours requests are handled including the steps followed, escalations etc. to ensure that the travellers do not experience undue risks or that unauthorised bookings are not confirmed. Indicate if this is an in-house or outsourced service. Include telephonic details that will be provided and confirm that the Group travel consultant's mobile 24-hour details is provided.	5
	<b>Capacity and skills of resources</b>	<b>8 points</b>
2.	a) Skills and experience of the Account manager. The Account manager should have at minimum 5 years relevant travel account management experience in the travel industry. The greater the years of experience and skill level, the greater the score. It is preferable that the Account Manager has experience with group travel.	3
	b) Provide an Organogram of the organisation and include the details related to the MICE (Meetings Incentives Conference and Events) team and stakeholders involved with the facilitation of group travel., considering the complexity and scale related to Wits large group travel requirements. Indicate the level of experience of each of the proposed members of the group support team and the seniority of the team. In addition, indicate the resource backup plan to ensure business continuity. It is required that a senior consultant of at least 7 years of experience is assigned to the account with additional resources for support/backup. Include information related to the capacity and employee size of the company including the volume of senior consultants and key members (account managers etc.).	5
	<b>Quotation format</b>	<b>3 points</b>
3.	Provide your quotation format including as much detail as possible that can be provided including air and accommodation booking details. This should be a quotation for a group booking.  This quote should include the cost per person for the flight, as well as any applicable service fees. Additionally, we require the quote to contain a comprehensive list of names for the travellers, ensuring accurate identification. It is essential that all relevant terms and conditions pertaining to the air tickets and accommodations are clearly stated in the quote. Please note that the University has a preference for the VAT totals and service fees to be displayed separately in the quote. This preference will be taken into consideration during the evaluation process. The quote format will be considered for acceptability. If deemed as unacceptable, this may impact on a risk assessment and your evaluation status.	3
	<b>Technology and Cost savvy</b>	<b>9 points</b>
4.	a) Is the TMC keeping up with the latest technologies such as Travel apps to assist the traveller to track his travel request, innovative mobile apps etc.	2
	b) Does the TMC have steps in place to enable them to compete with internet pricing with possibly matching online rates and indicate if TMC has access to consortia pricing	5
	c) Mobile application usage - Include which platforms you engage with to enable a more efficient, more effective, and seamless traveller, and travel booker experience and detail what information is shared on the various devices/platform.	2
	<b>Group bookings</b>	<b>15 points</b>
5.	a) Explain your events management/group travel experience. Show evidence of your capacity to handle large group bookings. Provide the years of experience and scale of experience (candidate volume and value of the group travel). Evidence supporting a requirement of facilitating group travel for 10 or more candidates or group bookings specialised (100	10

	candidates or more) and for an international trip value greater than or equal to five million Rand will result in the highest score for these criteria. Include your Standard operating protocol to complete which will be assessed for completeness and comprehensiveness	
	b) Detailed explanation of full management of delegate groups' travel and ground transfers (Domestic/Int). A sample plan indicating what is considered when addressing a group travel requirement must be provided.	5
	<b>Reporting</b>	<b>5 points</b>
6.	a) provide a sample report of a group travel trip that you have conducted including relevant trip details, logistics, challenges, positives etc.	5
	<b>Dependencies / Risks</b>	<b>10 points</b>
7.	a) Indicate any dependencies you have and risks, especially any related to the protection of personal information. Indicate how these risks are mitigated. Describe your Business Continuity Plan: How is the TMC address system downtime, load shedding and backup recovery of information, times, and maintenance period. Provide details of the disaster recovery plan in the event of power failure, technical difficulties, or resource unavailability.	5
	b) Indicate your backup/contingency plan for the Group Travel Consultant and how this will ensure that the group travel programme is not compromised if the person is not available during critical times	5
<b>TOTAL POINTS FOR FUNCTIONALITY</b>		<b>100 points</b>

#### 8.4 **Stage 3: Presentations**

- 8.4.1 This phase of assessment follows the technical compliance/functionality stage in the evaluation process and only successful Tenders that have met the minimum requirements in the technical/functionality stage will be considered. Further thresholds may be applicable at this stage.
- 8.4.2 The University may elect only to invite the top-ranked Tenderers for presentations and may further shortlist for site visits for each Component. The top tenderers will be shortlisted based on the proposed functionality criteria.
- 8.4.3 The University may require short-listed Tenderers to make presentations to the University's evaluation team on the date and at the place in section 2.1.
- 8.4.4 Presentations are designed to allow Tenderers to present their solution and various aspects as identified by the University. A question-and-answer session is part of the presentation phase. A threshold of 70% will be applied for Presentations for Components 1, 2 and 3.

#### 8.5 **Stage 3/4: Price, Preference (B-BBEE) Evaluation and where applicable Consideration of Previous Stages**

- 8.5.1 Tenderers who met the thresholds in the previous stages will be evaluated further.
- 8.5.2 In this final stage, the criteria elements below will be considered. Therefore, a Tenderer's Tender Submission will be evaluated based on the weightings set out below and indicated formulae:

Component 1	Documents Required	Weighting %
Price	Annexure C.1: Price Schedules to be completed	90%

B-BBEE	Please submit a current, valid B-BBEE certificate issued by a SANAS accredited verification agency unless the Tenderer is an exempted micro enterprise (EME) or a qualifying small enterprise (QSE), in which case the Tenderer may submit a sworn affidavit in accordance with the B-BBEE Act: Codes of Good Practice published in Government Gazette No. 36928. <i>Refer to below 8.5.4 B-BBEE Score Card</i>	
	• B-BBEE Level	5%
	• Tenderers with 51% or more Black Ownership	5%
<b>Total</b>		<b>100%</b>
<b>Component 2</b>	<b>Documents Required</b>	<b>Weighting %</b>
Price	Annexure C.2: Price Schedules to be completed	80%
B-BBEE	Please submit a current, valid B-BBEE certificate issued by a SANAS accredited verification agency unless the Tenderer is an exempted micro enterprise (EME) or a qualifying small enterprise (QSE), in which case the Tenderer may submit a sworn affidavit in accordance with the B-BBEE Act: Codes of Good Practice published in Government Gazette No. 36928. <i>Refer to below 8.5.4 B-BBEE Score Card</i>	
	• B-BBEE Level	10%
	• Tenderers with 51% or more Black Ownership	5%
	• EME (turnover is under R10 million)/ QSE/ 30% Black Female Owned	5%
<b>Total</b>		<b>100%</b>

### 8.5.3 **B-BBEE Score Card**

8.5.3.1 The scorecard below will guide the points for Component 1 and 2. Component 1's BEE points will be halved accordingly as the percentage weighting for the BEE level in the final scorecard is 5%.

B-BBEE Status Level Contributor	Number of Points (10% B-BBEE)
Level 1 contributor	10
Level 2 contributor	9
Level 3 contributor	8
Level 4 contributor	5
Level 5 contributor	4
Level 6 contributor	3
Level 7 contributor	2
Level 8 contributor	1
Non-Compliant contributor	0

**Note:** Non-compliant contributors or failure to provide certification substantiating the B-BBEE status level of contribution will result in the Tenderer being awarded zero (0) points for the preference point system.

### 8.6 **Price Points Calculation**

#### **Component 1**



A maximum of 90 = 90 points is allocated for price on the following basis:

$$PS = 90 \left\{ \frac{1 - \frac{Pt - Pmin}{Pmin}}{Pmin} \right\}$$

Where:

- Ps = Points scored for the comparative price of the Tender Submission under consideration;  
90 = Ratio allocated to pricing for scoring purposes;  
Pt = Comparative price of the Tender Submission under consideration; and  
Pmin = Comparative price of the lowest acceptable Tender Submission.

### Components 2

A maximum of 80 = 80 points is allocated for price on the following basis:

$$PS = 80 \left\{ \frac{1 - \frac{Pt - Pmin}{Pmin}}{Pmin} \right\}$$

Where:

- Ps = Points scored for the comparative price of the Tender Submission under consideration;  
80 = Ratio allocated to pricing for scoring purposes;  
Pt = Comparative price of the Tender Submission under consideration; and  
Pmin = Comparative price of the lowest acceptable Tender Submission.

### 8.7 Other Information

- 8.7.1 A short list of potential Tenderers may be compiled after a review of all the Tender Submissions. Short-listed Tenderers may be required to make a further online presentation to the University's tender evaluation committee members, at a time and venue to be advised by the University.
- 8.7.2 The University may elect to conduct a due diligence investigation on any Tenderer which may include but is not limited to i) Interviewing the Director/Manager of any Tenderer; ii) Interviewing client references; iii) Conducting on-site inspections and/or investigations (if not done so already); iv) Tenderers may be requested to provide access to information.
- 8.7.3 All Tenderers will be formally notified (successful or not) after the evaluation process has been completed and are requested not to contact the University in this regard.

## PART D: SCOPE OF WORK

### 9 SCOPE OF WORK

- 9.1 The detailed scope of work is attached to the Tender Documents and marked Annexures A for the respective service components.
- 9.2 Tenderers must ensure that before submitting a Tender Submission that they can meet the University's requirements as set out in Annexures A for each of the service components.
- 9.3 **Note:** The University will not accept any variation to Annexure A for each of the Components of Travel Management Services

## PART E: RETURNABLE SCHEDULES & DOCUMENTS

### 10 THE SUBMISSION OF RETURNABLE SCHEDULES & DOCUMENTS

- 10.1 The Tender Submission will be evaluated based on the information submitted as instructed through the returnable schedules and documents.

- 10.2 The Tenderer's Tender Submission must be composed according to, and in the sequence as set out in Annexure B: Returnable Schedules and Documents. Additional instructions are contained under the applicable sections per Annexure B: Returnable Schedules and Documents.
- 10.3 Tenderers must complete the returnable schedules in type-written format and submit them in PDF and/or Excel compatible (.xls) (where indicated).
- 10.4 Tenderers must ensure that all returnable schedules, documents, and certificates are legible, current, legally compliant and valid.

## PART F: PRICING

### 11 PRICING INSTRUCTIONS

- 11.1 All Tenderers submitting a Tender Submission in response to this RFP/Tender Documents must ensure that they price correctly for each Component as set out in the RFP/Tender Documents. It is important to note that Tenderers must not assume that where they are awarded Component 1, they will be awarded the remaining components. To preclude any uncertainty, Tenderers are hereby notified against furnishing all-inclusive pricing that covers all Components. Pricing for each Component is to be presented. Moreover, as per the RFP/Tender Documentation and the procurement strategy, a panel of providers will be appointed. Tenderers specifically acknowledge and agree that the awarded Contract does not constitute an undertaking by the University that it will procure minimum or any quantities and/or any guaranteed volumes of the services. By submitting a Tender Submission in response to this RFP/Tender Document. Tenderers agree to the conditions outlined in this section. Accordingly, Tenderers are urged to carefully review and adhere to the requirements set forth in the RFP/Tender Documents and to seek their own financial advice before submitting Pricing.
- 11.2 The pricing that the Tenderer submits will be considered the Tenderer's final pricing which will be included in the Contract. The Excel spreadsheet that is Annexures C. Price Schedules must be used to submit the applicable pricing as indicated in these Tender Documents.
- 11.3 Tenderers must show its pricing information using the pricing template contained in C.Price Schedules.
- 11.4 Pricing must be submitted in editable and printable softcopy in both the original Excel compatible (.xls) and .pdf formats.
- 11.5 Tenderers agree that an item against which no rate or price is entered by the Tenderer shall be covered by other rates or prices detailed in the Tenderer's final pricing submitted.
- 11.6 Pricing must be wholly inclusive of all components that will deliver the services of the total solution in accordance with Annexures A.
- 11.7 **General:**
  - 11.7.1 The Tenderer's proposals must be in South African Rands and valid for the contract duration.
  - 11.7.2 The successful tenderer(s) agrees and undertakes that all costs must remain firm and fixed and firm the date of receipt of the purchase order issued by the University and no additional costs will be accepted thereafter by the University.
  - 11.7.3 Subject to section 11.8 as well as the provisions contained in Annexures A, on each contract anniversary, escalation of fees must be determined by both parties in accordance with the terms of the Contract. Such escalation will take into consideration the consumer price index (CPI) as outlined in the awarded Contract and the budgetary parameters of the University.
- 11.8 **Annual Escalation Adjustments:**

11.8.1 The prices for the goods and/or services specified in Annexure A: Scope of Work for local services will remain unchanged for the first 12 (twelve) months of the Contract. Thereafter, such amounts may be negotiated by both parties, provided that the relevant supporting documentations are supplied, taking into cognisance CPI definition in the contract and University budget parameters; on the first and each subsequent annual anniversary of the effective date (the successful service provider is required to give 1 (one) month's prior written notice of such adjustment)..

11.9 **Cost Savings:**

11.9.1 The University expects the Tenderer to be an active partner in generating ideas to reduce costs beyond only price reductions. Tenderers must complete the required pricing worksheets and can provide alternative cost-reduction methods that may benefit the University. These alternatives must be included in a separate worksheet(s) in the workbook: Annexure C. Price Schedules and/or in a separate information schedule.

**PART G: INSURANCE**

**12 INSURANCE REQUIREMENTS**

12.1 A Tenderer **must** demonstrate that it has an adequate insurance cover to meet the minimum requirements as set out in the Scope of Work **or obtain a letter of confirmation from its insurers** indicating that the Tenderer will qualify for adequate insurance cover to satisfy the minimum requirements **or provide their commitment to having the insurance in place at time of contract conclusion if awarded**. The Tenderer will have to establish its standard company insurance (please refer to Annexure B: Returnable Schedules and Documents) and details of:

12.1.1 professional indemnity insurance of at minimum R5 million; and

12.1.2 general and commercial risk liability insurance which includes defective workmanship, public liability, cyber risk insurance of at minimum R5 million.

12.2 Tenderers agree that should it be awarded as a successful service provider that it shall at all times maintain insurance coverage satisfactory to the University's insurance brokers. Proof of payment of premium for the respective policy shall be furnished annually to the University in the event the Tenderer is the successful service provider. This should not have an impact on the Tenderer's submitted pricing.

**PART H: THE CONTRACT**

**13 THE CONTRACT**

13.1 Tenderers must please take note of the following important contractual terms:

Indicative Contract Dates for Components 1 and 2:	01 January 2024
Indicative Contract Duration:	60 (sixty) months
Classification and Type of Contract:	Travel Management Services Agreement  <small>THIS DRAFT AGREEMENT WILL BE AMENDED ACCORDINGLY TO REFLECT THE SERVICE COMPONENT (AS SET OUT IN THE SCOPE OF WORK DOCUMENT INCLUDED IN THE PUBLISHED TENDER PACK) ONCE AN AWARD HAS BEEN MADE TO A SUCCESSFUL TENDERER.</small>

13.2 Any award made as a result of this Tender process will be governed by the regents of the Contract.

13.3 In the event that a Contract has been included in the Tender Documents (see Annexure E: Draft Contract) and if a Tenderer takes exception or wishes to propose a deviation to any term or condition in the Contract, it must be done clearly and conspicuously by referencing the specific clause number or the term or condition

and by describing the exception or deviation in Annexure B under the Contract Deviation Schedule. If a Tenderer does not clearly and conspicuously take an exception or propose a deviation to a specific term or condition, the Tenderer shall be bound by such term or condition in the event the award is made to it. The University reserves the right to in each instance to:

- 13.3.1 Accept the deviations or exceptions; or
  - 13.3.2 Negotiate the deviations or exceptions; or
  - 13.3.3 Reject a proposal with deviations or exceptions deemed unacceptable by the University at its option and in the exercise of its sole discretion.
- 13.4 The rejection or amendment by the Tenderer of any terms and conditions contained in the Contract may increase the risk to the University and will thus be taken into consideration when assessing the Tenderer's Tender Submission.
  - 13.5 Tenderers should not provide or include their own contract, service level agreement or '*reserve the right to negotiate if the Tenderer is selected as the preferred service provider*' statement (the University will not consider this type of documentation). Tenderers must ensure that they follow the protocol as set out in section 13.3.
  - 13.6 The Tender awarded will be conditional and subject to successful negotiations and the signing of a written contract, failing which the University reserves the right to withdraw the Tender and to award another Tenderer without the need to repeat the same Tender process.
  - 13.7 Should final contract negotiations with the preferred Tenderer not be concluded within 3 (three) weeks of the tender award or the preferred Tenderer takes exception to certain terms in the Contract that the parties cannot agree to, the University reserves the right to cancel the award and select an alternative Tenderer.