



ITEM TITLE	RFP FOR THE PROVISION OF AN IN-HOUSE TRAVEL MANAGEMENT SOLUTION ON A THREE-YEAR CONTRACT FOR THE UNIVERSITY OF JOHANNESBURG
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1. PURPOSE OF THE RFP

The University of Johannesburg is seeking a travel service provider to partner in providing business management travel experience. The RFP is seeking an In-House Travel Management Solution that makes use of an Online Booking Tool that must be able to provide a fully integrated, complete, easy to use and scalable platform to create, approve, book, manage and distribute all types of travel products and services for domestic, regional, and international travel. The products and services are to include but not limited to, accommodation arrangements, car hire arrangements, VISA applications/arrangements, and Excursion / Tours. To enforce compliance, the travel and accommodation requirements must be met in line with the University of Johannesburg's Travel and Subsistence Policy.

At the core of this partnership, UJ is seeking a partner that will enhance client experience, seamless processes, and business productivity. The partner must be able to demonstrate negotiation and buying power which can be leveraged to the benefit of UJ staff and students.

The In-House Travel Management Agent will manage global travel conditions, including health warnings, weather forecasts, visa applications/arrangement information, airport rules, baggage policy, supplier updates, and managing risk travel.

The proposed booking solution must be able to integrate with the University of Johannesburg's **ERP System**. No collaborative ventures will be permitted.

Service Level Agreement (SLA):

- The awarded service provider (or suppliers) will sign a service level agreement (SLA) with University of Johannesburg.

Supplier Due Diligence

- The University of Johannesburg reserves the right to perform supplier due diligence before the final award of the contract or at any moment within the term of the contract.

The University of Johannesburg intends to award a 36-month contract with the option to extend for a further 2 years based on performance.

It is expressly understood that the University of Johannesburg is free to change its Travel and Subsistence Policy as it sees fit. The Travel and Subsistence Policy will be accessible, and a link will be provided.

2. INTRODUCTION

As a vibrant, multicultural, and dynamic institution, the University of Johannesburg (UJ) shares the pace and energy of cosmopolitan Johannesburg, the city whose name it carries. Proudly South African, the university is alive down to its African roots and well-prepared for its role in actualizing higher education's potential for the continent's development. UJ has transformed into a diverse, inclusive, transformational, and collegial institution, with a staff compliment of approximately 8,650 and a student population of over 50,000, of which more than 3,000 are international students from 80 countries enrolled across the four (4) campuses. This makes UJ one of the largest contact universities in South Africa.

The University has a travel policy for the staff and student population that directs travel arrangements based on traveller profiles, with the Executive Leadership Group (ELG) ranking highest and the Non-Executive Leadership Group coming in second.

The highest scoring service provider will be provided with office premises at the University's Auckland Park campus and will be expected to provide travel-related services from 07h30 to 16h30 during working days; in addition, the service provider shall provide a 24-hour service to cater for after-hours as well as for services during weekends and official holidays where emergency travel services are required. This service may not be outsourced to another service provider.

The appointed service provider will be expected to comply with the POPIA Act and implement all the necessary measures to ensure that all UJ data is secure at all times and not accessible by unauthorized parties.

3. SCOPE OF WORK

The University of Johannesburg will require the following services, but not limited to:

3.1 AIR TRAVEL (DOMESTIC, REGIONAL, AND INTERNATIONAL)

3.1.1 Reservation and Ticketing

- a) For every duly approved travel request, Travel Agent shall immediately source formal quotations and make bookings based on the lowest (cheapest), acceptable fare and the most direct and convenient routing.
- b) In the event that required travel arrangements cannot be confirmed, the Travel Agent shall notify the travel coordinator of the problem and present three (3) alternatives where possible.
- c) The Travel Agent should notify the travel coordinator through e-mail and phone call for any travel changes.
- d) The Travel Agent shall accurately advise the travel coordinator of ticketing deadlines and other relevant information every time reservations are made in order to avoid cancellations of bookings.
- e) The Travel Agent must ensure that all travelling staff have the relevant travel documents, itineraries and vouchers for their journeys sufficiently before departure.
- f) Travel agents must be able to provide up-to-date information on immunizations, VISA application/requirements and other documentation required for the obtaining of a visa.

g) Air tickets shall be issued only for airlines/airline companies who are duly licenced for domestic/international air travel, for example, the International Air Transportation Association (IATA)

h) The Travel Agent shall only act on duly approved travel requests for official travel submitted by the responsible staff of the University of Johannesburg. The Travel Agent shall be given copies of University of Johannesburg travel policies and procedures and shall be fully familiar and always comply with these policies and procedures for all University of Johannesburg official travel.

i) The Travel Agent shall be responsible for booking airport parking facilities where required for the travel duration.

The Travel Agent shall assist with arranging foreign currency and issuing travel insurance for international trips where required.

3.1.2 Changes in Air Travel Arrangements:

a) In case of changes occurring to the original travel arrangements, the traveller is to liaise with the Travel Agent and make necessary arrangements, with the provision that such changes are confirmed and approved by University of Johannesburg delegation of Authority in writing.

3.2 ACCOMMODATION

a) The Travel Agent shall be responsible for the planning, arranging, confirming, amending, and paying domestic, regional, and international accommodation as per University of Johannesburg's Travel Policy and cost containment measures.

b) The Travel Agent shall ensure that bookings are made with accommodations nearest to the intended destination e.g conference venue.

c) The Travel Agent shall ensure that changes to bookings are made promptly.

3.3 CAR RENTAL/HIRE/E-HAULING/ SHUTTLE /BUS/ TRAIN SERVICES

a) Booking, confirming, and paying shuttle service requirements with any contracted Agent rendering a shuttle and chauffeur services as per University of Johannesburg Travel Policy where applicable.

b) The Travel Agent must ensure that car rental/hire and shuttle service suppliers comply with the rules and regulations governing the public transport industry.

c) Safety precautions must be taken for ELG members not to travel simultaneously.

One solution is to implement staggered travel schedules, where members are assigned specific travel times to minimize the number of people traveling together.

3.4 TRAVEL PACKAGES FOR EXCURSIONS

The travel agent must be able to provide packages for our local and international students, for local excursions.

Safety precautions must be taken for Group package excursions to ensure the well-being of all participants. These precautions include providing comprehensive travel insurance coverage for unforeseen circumstances such as accidents or medical emergencies.

The following is required (but not limited to):

- Bus hire for up to 90 students (may the students be kept apart for safety reasons)
- Refreshments/ Meals on the bus
- Accommodation/ Meals at all layovers
- Travel/medical Insurance for students whom UJ Insurance does not cover
- Booking of tickets for tours as well as tour guides and drivers
- Group bookings for meetings, conferences etc

3.5 ACCOUNT REQUIREMENTS/ FINANCIAL MANAGEMENT

3.5.1 Accounts Payable (AP)

The travel booking tool should be able to integrate with UJ's ERP system to reserve funds on specific GL codes.

Travel Agent must provide statements in a spreadsheet that distinguishes transactions between the agency and Diners (UJ insurance service provider) so AP can make separate payments to the service providers.

Travel amendments when there is an extension in travel.

Statements sent by the agency should show car hire separately.

Bill backs should be done in the same financial year when travel occurred.

Invoicing must be automated.

Payment will be made in 30 days following the submission of an invoice.

3.5.2 Payroll

Requires air-tickets as the official document to be able to count days of travel.

Needs to have access to booking system to be able to draw Annexure 1 (where travel approvals are made) and Travel Order Form.

Physical (supporting) documents required as well should be able to be extracted from the system/booking tool.

3.5.3 Financial Business Partners

The booking system should allow travel approval by relevant Director, HOD, VC or ELG Member as per the policy.

Requires the travel booking to be recorded on the general ledger immediately.

The booking system should be able to give a full travel report on all committed expenses to import data to the ledger. Report must be updated daily.

3.5.4 Systems

The proposed system must be able to integrate with various ERP Systems.

3.6 TECHNOLOGY, INFORMATION MANAGEMENT AND REPORTING

ONLINE BOOKING TOOL

- a) All local travel (airline tickets, accommodation, car rental, point-to-point transfers and parking facilities at airports), can be booked, approved and amended online. The Travel Agent may not charge consultant service fees in cases where the online booking tool does not make provision for the booking or amendment of these local services/sectors.

- b) The Tool should be able to provide specialist reports.
- c) Should allow for the necessary corporate airline agreement information/data to be captured and the necessary information/data to be provided to the airlines.
- d) The tool should make provision for the UJ to add and remove cost centres and authorised approvers per cost centre. UJ will not be liable for any service rendered unless duly authorized UJ employees approve such service (it remains the responsibility of UJ to ensure that authorizers are correctly captured on the online booking tool).
- e) The tool should employ approval escalation flows (to be added/amended online by UJ) for each cost centre and out-of-policy approvals.
- f) The tool should require uploading of supporting documentation before a booking is sent for approval (based on policy group settings).
- g) The tool should make provision for UJ to create policy groups and limits for each service/sector type per policy group.
- h) The agent should be able to work within the stipulated budget. This should be a field contained within the system.
- i) The tool should be able to integrate and commit funds within UJ's ERP System.
- j) Should allow for traveller profiles to be created and amended online by UJ. Traveller profiles will contain all the information normally required to travel (Full names. ID number etc.) as well as:
 - Contact information to enable the sending of SMSs and e-mails to travellers.
 - Policy group applicable to each traveller (which can only be amended by UJ administrators)

To ensure that all travel requests adhere to the university's travel policy, the online booking tool must be adjusted to the specific needs of the UJ. The Travel coordinator will have access to all necessary information, which will be thorough, detailed, and simple to use.

3.7 ACCOUNT MANAGEMENT

- a) It is a requirement that the Travel Management Agency appoint a Key Account Manager who has to manage the overall contract with the UJ.
- b) The Travel Agent must consistently deliver high-quality service to UJ travellers. It is a requirement that highly skilled agents be assigned to the UJ Account.
- c) A bidder's proposal must include an approximate number of hours dedicated to Key Account Management.
- d) All queries and compliments are to be logged in a register, and complaints must be resolved within 2 business days.
- e) The Travel Management Agency must provide Management Information (MI) Reports. Provide details of the standard report and include examples.
- f) Arrange and manage customer satisfaction surveys.

3.8 DEDICATION TO CUSTOMER SERVICE

- a) The Travel Management Agency should have dedicated travel booking consultants to the UJ account.
- b) Must be able to provide traveller culture education to UJ travellers.
- c) The university requires the agency to train personnel dedicated to the UJ Account.
- d) The UJ Travel Policy must consider customer preference.

3.9 AFTER-HOURS AND EMERGENCY SERVICES

- a) The Travel Management Agency should provide contact details for the 24-hour service to cater for after-hours, weekends, official holidays and all emergency travel services.
- b) The after-hours personnel should be able to communicate with UJ travellers on different time zones worldwide.
- c) The agency should be able to communicate with UJ Travellers in cases of unexpected events during the UJ Travellers visit.

3.10 VALUE ADDED SERVICES

The Travel Management Agency must indicate the added value it will provide to the University of Johannesburg.

4. REPORTS

The University of Johannesburg's Management will request Reports on detailed expenses per completed travel month for each service, inclusive of savings, exception reports and carbon footprint. The reports must be submitted together with month-end statements as prescribed by the University of Johannesburg.

5. DELIVERABLES

- 5.1 University of Johannesburg Management will request Reports on detailed expenses per completed month for each service, inclusive of all savings, exception reports and carbon footprint.
- 5.2 Indicate your process and timeframes for the settlement of agency fees and the payment of commissions and overrides to the UJ.
- 5.3 Describe your ability to allocate these to a central source and cost centres within the UJ.
- 5.4 Describe your procedure for ensuring that only UJ-authorized travel will be charged to the UJ account.
- 5.5 Describe your policy towards payment of override commission, promotional fares or other compensation to your company from travel suppliers.
- 5.6 Indicate how the UJ will benefit from this arrangement.
- 5.7 Set-up office onsite and provide full training on the Online Booking Tool to UJ staff.

6. GENERAL

As part of exercising its due diligence, UJ must perform the following tasks:

- 6.1 To conduct site visits to each bidder's offices.
- 6.2 To test the integration of the booking system into UJ's current ERP System.
- 6.3 Will require a presentation on how bookings will be made using the Online Booking Tool.

7. PRICING SCHEDULE:

For the pricing schedule, kindly refer to Annexure A.

8. EVALUATION CRITERIA

The following standard adjudication criteria in four-stages approach will be utilised in the adjudication process:

- 8.1 Phase 1: Mandatory Requirements Evaluation Criteria
- 8.2 Phase 2: Functional Evaluation
 - 8.2.1 Technical Evaluation Criteria
 - 8.2.2 Online Booking Tool (demonstration)
- 8.3 Phase 3: Preferential Scoring

8.1 PHASE 1: MANDATORY REQUIREMENTS

All mandatory documents as per the SCM Mandatory requirements in this RFP should be completed in full, signed and submitted with the Bidder's response to this RFP. Failure to comply with this requirement or submission of false, fraudulent, or misleading information or documents will result in the disqualification of the Bidder or termination of the successful bidder's contract.

- Signed Tender Document
- Signed Standard Terms and Conditions
- Signed Acceptance of Terms and Conditions
- Signed Supply Agreement
- A valid SARS Tax Compliance Status (certificate / pin)
- A valid B-BBEE Contribution Level Certificate / sworn affidavit
- Letter of good standing in terms of COIDA
- Company Registration/ CSD
- Valid and certified IATA (International Air Transport Association) attach proof of registration (letter of good standing) or certified copy of the license
- Member of ASATA (Association of Southern African Travel Agents), attach proof of registration. (Letter of good standing or copy of valid certificate)

8.2 PHASE 2 : FUNCTIONAL EVALUATION

Functionality in terms of the set technical evaluation criteria

8.2.1 TECHNICAL EVALUATION CRITERIA

NO.	DESCRIPTION	WEIGHT
	Bidder(s) Experience, Contract Value and Client References	
	<p>The service provider must provide a detailed company profile indicating the years of experience in domestic, regional and international corporate travel management within the higher education sector or similar business environment and written reference letters of awarded contracts of above R50 million for similar services rendered pre and post covid, the reference letters must be on a letterhead and signed by a duly authorised person. The documents must include: Client name • Contact Person • Contact telephone numbers and email • Contract Value• Contract Period</p> <p>Bidder Experience 0 -5 Years Experience = 2 Points 5-10 Year Experience = 3 Points 10-15 Years Experience = 4 Points More than 15 Years Experience = 5 Points</p> <p>Contract Value R50 000 000 or less = 2 points R50 000 001 – R100 000 000 = 3 points R100 000 001 - R 150 000 000 = 4 points R150 000 001 or more = 5 points</p> <p>Bidders Reference Letters with Regional and International Booking Experience 0-3 Reference Letters = 3 Points 3-5 Reference Letters = 5 Points</p>	15
	Customer Centricity	
	<p>Capacity of Staff</p> <p>Key Account Manager and staff in the Travel Management Sector with qualifications and experience. Attach CV and Supporting Documents.</p> <p>Key Account Manager (17) points</p> <p>Tourism and Hospitality Qualifications or related = 3 points</p> <p>Professional Registration</p> <ul style="list-style-type: none"> • Single Registration = 1 point • Multiple Registrations = 2 points 	30

	<p>General Career Experience</p> <ul style="list-style-type: none"> • Less than 5 years post qualification experience in travel industry = 0 points • 5 – 8 years post qualification experience = 2 points • 8 – 10 years post qualification experience = 3 points • More than 10 years post qualification experience = 5 points <p>Experience with projects of similar size in a tertiary educational facility environment or similar environment:</p> <ul style="list-style-type: none"> • One client for a contract over R50 million = 1 point • Two clients for a contract over R100 million = 3 points • Three clients for a contract over R150 million = 4 points <p>Personnel Management</p> <ul style="list-style-type: none"> • Has managed a team of travel booking consultants for 0 – 5 years = 2 points • Has managed a team of travel booking consultants for more than 5 years = 3 points <p>Staff (09) points</p> <p>Two Travel Booking Consultants</p> <p>Tourism and Hospitality Qualifications or related = 3 points</p> <p>Professional Registration</p> <ul style="list-style-type: none"> • Single Registration = 1 point • Multiple Registrations = 2 points <p>General Career Experience</p> <p>Provide brief travel experience and history of destinations travelled to regionally and internationally.</p> <ul style="list-style-type: none"> • Less than 5 years post qualification experience in travel industry = 0 points • 5 – 8 years post qualification experience = 2 points • 8 – 10 years post qualification experience = 3 points • More than 10 years post qualification experience = 4 points <p>Customer Care (4)</p> <p>Dedicated Travel Booking Consultants</p> <ul style="list-style-type: none"> • Cannot provide dedicated consultants with international travel booking experience = 0 points • Can provide dedicated consultants with international travel booking experience = 2 points <p>24 hour and Emergency Service</p> <ul style="list-style-type: none"> • Cannot provide personnel for 24-hour and emergency services = 0 points • Can provide personnel for 24-hour and emergency services = 2 points 	

	Financial Status	
	<p>Financial status (turnover) Attach audited or reviewed Annual Financial Statements.</p> <p>(Previous year)</p> <ul style="list-style-type: none"> • R1Million or less = 2 points • >R1Million<R3million = 4 points • >R3Million<R5Million = 6 points • >R5Million<R10Million =8 points • R50Million or more = 10 points 	10
8.2.2	ONLINE BOOKING TOOL	
	<p>Integration with ERP System</p> <ul style="list-style-type: none"> • Unable to integrate with various ERP Systems = 0 points • Two reference letters for two ERP Systems that is able to integrate with = 3 points • Five reference letters for various ERP Systems that is able to fully integrates with = 5 points 	5
	<p>Cost Centre</p> <ul style="list-style-type: none"> • Does not allow for cost centre inputs, amendments and removal = 0 points • Allows for cost centre inputs, amendments and removal = 5 points 	5
	<p>Authorised approvers & approval flows</p> <ul style="list-style-type: none"> • Does not support input of authorised approvers based on approval escalation flows = 0 points • Grants access to authorised approvers based on approval escalation flows = 5 points 	5
	<p>Reservation of Funds</p> <ul style="list-style-type: none"> • Does not allow commitment of funds for reservation on UJ's ERP System = 0 points • Allows for commitment of funds for reservation on UJ's ERP System = 5 points 	5
	<p>Traveller profile creation and amendment</p> <ul style="list-style-type: none"> • Does not allow creation and amendment of traveller profiles = 0 points • Allows creation and amendment of traveller profiles = 5 points 	5
	<p>Policy groups with limits</p> <ul style="list-style-type: none"> • Unable to created policy groups with limits = 0 points • Permits creation of policy groups with limits = 5 points 	5
	<p>Supporting documents</p> <ul style="list-style-type: none"> • Does not have a field for attachment of supporting documents = 0 points • Has a field that allows attachment of supporting documents = 5 points 	5

	Customised Spend Reports <ul style="list-style-type: none"> • Unable to provide specialist reports = 0 points • Able to provide specialist reports = 5 points 	5
	Data and Information Security Measures <ul style="list-style-type: none"> • Does not have measures in place to ensure data and information protection from third parties = 0 points • Have measures in place to ensure data and information protection from third parties (outline measures) = 10 points 	5
	TOTAL	100

A minimum of 70 points is required by any tenderer in terms of the **Phase 2: Functionality**. All tenderers who achieve 70 points or more will be evaluated in terms of **Phase 3: Preferential Scoring**

8.3 PHASE 3: PREFERENTIAL SCORING

Quantitative Evaluation (Price and B-BBEE)

- Price (90 points)
- BBBEE (10 points)