



in the footsteps ...

NELSON MANDELA MUSEUM

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PROVISION OF TRAVEL MANAGEMENT SERVICES FOR THE NELSON MANDELA MUSEUM FOR A PERIOD OF THREE (3) YEARS

NMM-2024-06

TERMS OF REFERENCE

➤ BACKGROUND

The Nelson Mandela Museum (NMM) is a not for profit institution established by the government of South Africa as an agency of the National Department of Sports, Arts and Culture. It was established as part of a portfolio of legacy projects that seek to transform the heritage landscape from our apartheid past. At the same time, it is a resource for promoting economic development through tourism in an impoverished region of the country. The museum primarily houses collections of gifts to the nation given by Nelson Mandela to the museum to share his legacy with the nation.

The mandate of the Nelson Mandela Museum is to preserve and promote the legacy of Nelson Mandela and one of its main strategic goals is to improve the museum's public profile and access. This mandate is executed through the museum's two main facilities, the Qunu Youth and Heritage Centre, and the Bhunga Building in Mthatha CBD. The Bhunga Building doubles as the administrative office of the museum.

➤ PURPOSE

The purpose of the request for proposals is to solicit proposals from bidders (s) for the provision of travel management services to the Nelson Mandela Museum. This document details and incorporates, as far as possible, the tasks and responsibilities of the potential bidder required by the Nelson Mandela Museum, for the provision of

travel management services. The appointed service provider is expected to provide the NMM with travel management services that are consistent and reliable while maintaining a high level of traveller satisfaction.

➤ **SERVICE REQUIREMENTS**

The successful bidder upon appointment will provide without limitation, the following travel management deliverables for this project;

General Service Requirements

- **The travel services will be provided to all travellers travelling on behalf of the Nelson Mandela Museum.**
- **Provision of travel management services during normal office (Monday – Friday,08:00 -16:30) and provide for after hours and emergency services.**
- **To deliver on an approved official order by the CFO or CEO of the NMM**
- **Confirmation of bookings to the relevant museum officials.**
- **Communicate changes to reservations with travelling officials on a regular basis.**
- **Ensure availability of a travel agent official on stand-by for 24/7 in case of an emergency.**
- **Deliver invoices and attach all copies of third party invoices once a month.**
- **Deliver correct monthly statements to the museum.**

- **The NMM officials may request frequent changes for bookings at short notice and the travel agent must be able to deliver these immediately.**
 - Familiarisation with current travel suppliers and negotiated agreements that are in place between the National Treasury and third parties. Assist with further negotiations for better deals with travel service providers.

 - Familiarisation with current NMM's Travel Policy and business processes implementation of controls to ensure compliance (controls in the system and traditional method were applicable),

- Penalties incurred as a result of the inefficiency or fault of a travel consultant will be for

- the TMC's account, subject to the outcome of a formal dispute process.

- Manage third party service providers by addressing service failures and complaints against these service providers.

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- **Summary of services required by the NMM:-**

Service Category
Air travel – Domestic
Air Travel - Regional & International
Car Rental - Domestic & Fuel
Car Rental - Regional & International
Shuttle Services – Domestic
Accommodation – Domestic
Group Accommodation
Accommodation - Regional & International
Transfers – Domestic
Transfers - Regional & International
Bus/Coach bookings
Train - Regional & International
Conferences/Events
After Hours
Parking
Insurance

Reservations

- Receive travel requests from travel coordinator/administrators and respond with at least 3 quotations (confirmations) and availability. Upon the receipt of the relevant approval, the travel agent will issue the required e-tickets and vouchers immediately and send it to the travel administrator and traveller via the agreed communication medium (email ,text).
- **Reservation of flights, cars, accommodation, conference venues and any other travelling arrangements that might be requested (road, rail, air and sea) from time to time for NMM staff, guests and council members**
 - The Travel Management Company will:
 - Receive travel requests from travel coordinator/administrators and respond with at least 3 quotations (confirmations) and availability. Upon the receipt of the relevant approval, the travel agent will issue the required e-tickets and vouchers immediately and send it to the travel administrator and traveller via the agreed communication medium (email ,text).
 - Always endeavour to make the most cost-effective travel arrangements based on the request from the traveller and/or travel Administrator.
 - Appraise themselves of all travel requirements for destinations to which travellers will be travelling and advise the traveller of alternative plans that are more cost effective and more convenient where necessary.
 - Obtain a minimum of three (3) price comparisons for all travel requests where the routing or destination permits and a confirmation of the fact where it is not possible.

- Book the negotiated discounted fares and rates where possible.
- Must keep abreast of carrier schedule changes as well as all other alterations and new conditions affecting travel and make appropriate adjustments for any changes in flight schedules prior to or during the traveller's ofNMMial trip. When necessary, e-tickets and billing shall be modified and reissued to reflect these changes.
- Respond timely and process all queries, requests, changes and cancellations timeously and accurately.
- Must be able to facilitate group bookings and events (e.g. for meetings, conferences, events, etc.).
- Must issue all necessary travel documents, itineraries, and vouchers timeously (the day the booking is confirmed) to traveller(s) prior to departure dates and times.
- Advise the Traveller of all visa and inoculation requirements well in advance. Visa applications will not be the responsibility of the TMC. However, the relevant information must be supplied to the traveller(s) where visas will be required.
- Ensure confidentiality in respect of all travel arrangements and concerning all persons travelling, as required by the NMM.

Air Travel

- The bidder must be able to book full service carriers as well as low cost carriers
- The bidder will book the most cost-effective airfares possible for domestic travel.
- For international flights, the airline which provides the most cost effective and practical routings may be used
- The bidder should obtain three or more price comparisons where applicable to present the most cost effective and practical routing to the Traveller as well as be in a position to provide proof of price comparison
- Airline booking confirmation/voucher must be send electronically (SMS and/or email format) to the traveller(s) and travel bookers promptly after booking before the departure times
- Ensure that travellers are always informed of any travel news regarding airlines (like baggage policies, checking in arrangements, etc.)

Accommodation

- The TMC will obtain price comparisons within the maximum allowable rate matrix as per the cost containment instruction of the National Treasury and implemented by the NMM.
- NMM travellers may only stay at accommodation establishments with which the National Treasury has negotiated corporate rates. Should there be no rate agreement in place in the destination, or should the contracted establishment be unable to accommodate the traveller, the TMC will source suitable accommodation bearing in mind the requirement of convenience for the traveller and acceptable costs; or as stipulated in written directives issued from time to time by the National Treasury or the NMM.
- The TMC must during their report period provide proof, where applicable, that accommodation rates were booked within the maximum allowable rates as per the cost containment instruction of the National Treasury.

- The bidder must provide three or more price comparisons (online or manually depending on the set up) from accommodation establishments that provide the best available rate within the maximum allowable rate and that is located as close as possible to the venue or office or location or destination of the traveller.
- This includes planning, booking, confirming and amending of accommodation with any establishment (hotel group, private hotel, guest house or Bed & Breakfast) in accordance with NMM's travel policy.
- Cancellation of accommodation bookings must be done promptly to guard against no show and late cancellation fees

Car rental & shuttle services

- The TMC will book the approved category vehicle in accordance with the NMM's Travel Policy with the appointed car rental service provider from the closest rental location (airport, hotel, and venue).
- The travel consultant should advise the traveller on the best time and location for collection and return considering the traveller's specific requirements.
- The TMC must ensure that relevant information is shared with travellers regarding rental vehicles, like travel toll gates, refuelling, keys, rental agreements, damages and accidents, etc.
- For international travel, the TMC may offer alternative ground transportation to the Traveller that may include rail, buses, and transfers.

- The TMC will book transfers in line with the NMM's Travel Policy with the appointed and/or alternative service providers. Transfers can also include bus and coach services.
- The TMC should manage shuttle companies on behalf of the NMM and ensure compliance with minimum standards. The TMC should also assist in negotiating better rates with relevant shuttle companies.
- The TMC must during their reporting period provide proof that negotiated rates were booked, where applicable.
- The TMC must furnish the NMM with a minimum of three car options on the relevant group for the traveller
- The TMC must provide NMM travellers with shuttle services that are of acceptable standard

After hours and emergency services

- The appointed travel management company must provide a consultant or a team of consultants to assist travellers with after hour and emergency assistance.
- The travel agent is required to have personnel available at all times to cater for these changes i.e. 24-hours seven days a week availability.
 - A consultant/s must be available to assist NMM Travellers with after hour or emergency assistance.
 - A call centre facility or after hours contact number should be available to all travellers so that when required, unexpected changes to travel plans can be made and emergency bookings attended to.
 - The TMC must have a standard operating procedure for managing after

hours and emergency services.

Communication

- **The appointed service provider must ensure sound and effective communication with all NMM stakeholders.**
- **All enquiries must be investigated, and prompt feedback be provided to the NMM.**
- The TMC must ensure sound communication with all stakeholders. Link the business traveller, travel coordinator, Travel Management Company in one smooth continuous workflow.

Financial Management

- The appointed service provider must implement the rates negotiated by NMM with travel service providers, or the discounted air fares, or the maximum allowable rates established by the National Treasury where applicable.
- The appointed travel management company will be responsible to manage service provider accounts. This will include the timely receipt of invoices to be presented to NMM for payment within the agreed time period.
- The travel agent must be able to offer competitive prices at maximum flexibility.
- Where pre-payments are required for smaller Bed & Breakfast /Guest House facilities, these will be processed by the TMC. These are occasionally required at short notice and even for same day bookings.
- The TMC is responsible for the consolidation of invoices and supporting documentation to be provided to the NMM's Finance business unit on the agreed time period (e.g. weekly). This includes

attaching the Travel Authorisation Forms or Purchase Order and other supporting documentation to the invoices reflected on the service provider bill-back report or the corporate lodge card statement.

- Ensure Travel Supplier accounts are settled timeously by the TMC.

Account Management

- An Account Management structure should be put in place to respond to the needs and requirements of the NMM and act as a liaison for handling all matters regarding delivery of services in terms of the contract.
- The necessary processes should be implemented to ensure good quality management and always ensuring traveller satisfaction

- A complaint handling procedure must be implemented to manage and record the compliments and complaints of the TMC and other travel service providers.
- Ensure that the NMM's Travel Policy is enforced.

Value Added Services

- The appointed service provider must provide the following value-added services:
 - Destination information for regional and international travel.
 - SMS notifications for travel confirmations
 - Electronic voucher retrieval via web and smartphones
 - Global Risk Travel Management
 - Destination information for regional and international travel.
 - SMS notifications for travel confirmations
 - Electronic voucher retrieval via web and smartphones
 - Global Risk Travel Management
- Electronic voucher retrieval via web and smart phones.
- SMS notifications for travel confirmations.

Cost Management

- **Through the implementation of the National Treasury cost containment measures (as annexed) as a basis for a cost saving culture**

- It is the obligation of the TMC Consultant to advise on the most cost-effective option at all times, and costs should be within the framework of the National Treasury's cost containment instructions.
- The TMC plays a pivotal role to provide high quality travel related services that are designed to strike a balance between effective cost management, flexibility, and traveller satisfaction.
- The TMC should have in-depth knowledge of the relevant supplier(s)' products, to be able to provide the best option and alternatives that are in accordance with the NMM's Travel Policy to ensure that the Traveller reaches his/her destination safely, in reasonable comfort, with minimum disruption, cost effectively and in time to carry out his/her business.

Annual Travel Reviews

- Annual Reviews are also required to be presented to the NMM's Senior Executives.

Office Management

- The TMC to ensure high quality service to be delivered at all times to the NMM's travellers. The TMC is required to provide the NMM with highly skilled and qualified human resources of the following roles but not limited to:
 - Senior and Junior Consultants
 - Administration Back office (Creditors / Debtors/Finance Processors)

Pricing Mode:

- The NMM requires bidders to propose a transactional/service fee model. The NMM will at their discretion select the best possible cost-effective solution.

Transactional Fees:

- The transactional fees must be a fixed amount per service.

➤ REQUIRED COMPETENCES

- Bids are subject to screening by SSA and screening forms will be issued to shortlisted bidders only
- Continued failure to perform may result in termination of this contract
- The price structure should be valid for a 36 months period
- Increments will only be due on contract anniversary
- The service provider must have relevant working experience as a Travel Agent
- The travel agent must be registered with accredited institutions in the same industry such as IATA and ASAATA.
- The service provider is expected to have competent staff to carry the required duties such as the ability to use paper and e-tickets.
- Ability to update transactions on line and good turnaround times on travel arrangements.
- Thorough knowledge of the MICE market in South Africa.
- Demonstrable knowledge of travel arrangements for diverse markets including executives, learners, community members and professionals
- Knowledge of the global world and emerging markets
- 24-hour availability when necessary

➤ **TERMS AND CONDITIONS**

- All costs and expenses incurred by the potential service providers relating to their project proposal will be borne by each respective service provider. NMM is not liable to pay such costs and expenses or to reimburse or compensate service providers in the process under any circumstances, including the rejection of any proposal or the cancellation of this project.
- NMM reserves the right to request new or additional information regarding each bidder and any individual or other persons associated with its proposal.
- NMM may require responsive bidders to present and discuss their proposals in person.
- NMM reserves the right not to make any appointment from the proposals submitted.
- Bidders shall not issue any press release or other public announcement pertaining to details of their project proposal without the prior written approval of NMM.
- Bidders are required to declare any conflict of interest they may have in the transaction for which the bid is submitted or any potential conflict of interest. It is important that bidders declare their conflict of interest through completion of relevant attached forms.
- NMM reserves the right not to consider further any bid where such a conflict of interest exists or where such potential conflict of interest may arise.

- Any and all project proposals shall become the property of NMM and shall not be returned.
- The bid offers and proposals should be valid and open for acceptance by NMM for a period of 120 days from the date of submission.
- NMM reserves the right not to award the bid to the bidder that scores the highest points. Disputes that may arise between NMM and a bidder must be settled by means of mutual consultation, mediation (with or without legal representation) or, when unsuccessful, in a South African court of law.
- In addition to adherence to the specific terms and conditions of proposals, provided in this document, the bidder shall be bound by the provisions of the General Conditions of Contract, an original signed copy of which must be submitted together with all other bid documentation.
- All returnable bid documents must be completed in full and submitted together with the bidder's proposal. Should the returnable documents not be completed, the bid will not be considered any further.
- The successful bidder will be subject to supplier clearance process as prescribed by the National Treasury. This process includes, verification of supplier and its shareholders/directors/members' status on the list of defaulters and restricted suppliers.

- After the successful service provider has received the appointment letter, they must be able to deliver in full compliance with South African approved standards and in compliance to the specifications provided.

3 ACCOUNTABILITY

The service provider will be accountable to and under the direction of the CEO of the NMM in the performance of the assignment duties.

➤ PRICING INSTRUCTION

- The provision of travel management services must rendered as per the requirements of the NMM, and it must be invoiced on completion;
- The bid and the total price for the provision of travel management services may not be exceeded;
- Amounts due to the Service Provider shall be paid by the NMM within thirty (30) days of receipt of the invoice.
- The NMM reserves the right by giving written notice to the service provider to stop the works' progress at any time. Should the client exercise this right, the NMM will pay the service provider for work done and expenses incurred only up to the time that the notice was given.

➤ VALIDITY PERIOD

- Bid submissions **must** be valid for a period of 120 days.

➤ RETURNABLE DOCUMENTS

Service providers are required to submit all the returnable documents together with their quotations. ***Failure to provide all the Compulsory Returnable Documents at the closing date and time of this RFQ will result in a respondent's disqualification. Respondents are therefore urged to ensure that all these Documents are returned with their Quotations***

Compulsory Returnable Documents

- Duly signed & completed SBD 1: Invitation to Bid
- Duly signed & completed SBD 3.3 Pricing Schedule Firm Prices
- Duly signed & completed SBD 4 Bidder's Disclosure
- Duly signed & completed SBD 6.1 Preference Points Claims
- Duly signed & completed SBD 7.2 Rendering of Service
- Proof of CSD registration
- Valid copy of IATA & ASAATA certificate

Supporting Returnable Documents (for functionality scoring)

- Signed reference letters.
- Company Profile
- Project Implementation & Cost Containment Plan
- Valid industry association accreditation (ISATA & IATA)
- Proof of liquidity & solvency

Essential Supporting Documents

Specific goals verification documents on or before the closing date and time ***(failure to submit on or before the closing date will result in an automatic score of zero for preference***

➤ APPLICABLE PREFERENCE POINT SYSTEM

Points for this shall be awarded for:

- (a) Price; and
- (b) Specific Goals.
- (c) Where 80 points will be allocated for price and 20 points allocated for specific goals

(1) The following specific goals are applicable to all procurements of a transaction value above R2 000 and up to R50 000 000

a. The NMM will utilize the following preference criteria;

- i. Service providers within the OR Tambo region & Eastern Cape
- ii. Historically Disadvantaged Individuals (Women, Youth and People living with disabilities)
- iii. SMMEs

b.

Category		Sub-categories	Specific goals points	Verification documents
Local Supplier	5	OR Tambo supplier	5	CIPC Registration Certificate (CK) or Proof of residence
		Eastern Cape Supplier	4	
		Anywhere in South Africa	3	
		Non-South African	0	
Women-owned supplier	4	Black African Women	4	CIPC Registration Certificate (CK) and CSD Report
		Non-Black African Women	2	

Category		Sub-categories	Specific goals points	Verification documents
Youth Owned Supplier	4	Youth Owned (< 35-year-old persons)	4	CIPC Registration Certificate (CK) and CSD Report
		Non-Youth Ownership (> 35-year-old persons)	2	
People living with disabilities	3	People living with disabilities	3	CSD Report
Small Micro, Medium & Enterprises	4	SME – Owned by people with disability	4	CSD Report
		SME – Black owned	3	Sworn Affidavit (BBBEE Affidavit)
		SME – Other		

➤ **EVALUATION CRITERIA**

The bid will be evaluated and adjudicated using the 80/20 system (80 for Price and 20 for Specific Goals). Bids will be evaluated on an **80/20 preference points system** as prescribed in the Preferential Procurement Regulations of 2022. Functionality will be scored at a maximum of 100 points whereby the bidder must obtain a **minimum of 70 points** to qualify for the financial evaluation according to the criteria captured in the table below:

CRITERIA FOR EVALUATION	WEIGHT	BREAKDOWN OF POINTS
<p>Experience and track record in rendering similar services as evidenced by reference letters (must be in client letterhead, signed, service rendered, value of the contract, term of engagement and contacts) included in the response to this bid.</p> <p><i>NB: Points will only be allocated to reference letters that are accompanied by purchase orders and or appointment letter</i></p>	20	<p>More than 4 reference letters = 20 points</p> <p>3 reference letters = 15 points</p> <p>2 reference letters = 10 points</p> <p>1 reference letter = 5 points</p> <p>Failure to submit= No points allocated</p>
<p>Valid industry association accreditation</p> <p>Provide certificates indicating membership of team members to a relevant industry association</p>	10	<p>Accreditation with the International Air Travel Agent (ASATA) = 5 points</p> <p>Accreditation with International Air Travel Association (IATA) = 5 points</p> <p>No accreditation = No points allocated</p>
<p>Detailed Project Implementation and Cost Management Plan</p>	15	<p>Excellent=15 points</p> <p>Good=10 points</p> <p>Average=8 points</p> <p>Poor=5 points</p> <p>Failure to submit= No points allocated</p>

CRITERIA FOR EVALUATION	WEIGHT	BREAKDOWN OF POINTS
<p>That entails how the required services will be carried out for the NMM, which will include but not limited to:</p> <p>Monthly management reporting, analysis and reconciliations with statements (describe the process of how to approach)</p> <p>Emergency, after hours call and assistance line (Provide a Policy/Procedure/internal business process that includes a clause on emergency after hour call and assistance line)</p>		
<p>Company Profile</p> <p>A detailed company profile which provides insights into the company's history, leadership, industry experience, in-house</p>	<p>15</p>	<p>Excellent=15 points</p> <p>Good=10 points</p>

CRITERIA FOR EVALUATION	WEIGHT	BREAKDOWN OF POINTS
<p>capacity, adherence to quality standards and details of policy regarding cancellations, refunds, and changes.</p> <p>A clear, comprehensive company profile, detailing company policies, and any awards or recognitions received in the travel industry</p>		<p>Average=8 points</p> <p>Poor=5 points</p> <p>Failure to submit= No points allocated</p>
<p>Liquidity and Solvency</p> <p>provide latest audited/ independently reviewers financial statements (AFS) not older than one year</p> <p>demonstrate how your organisation will settle suppliers directly and then claim such payments from the NMM</p>	30	<p>Latest audited/ independently reviewers' financial statements (AFS) not older than one year =15 points</p> <p>Demonstrate how your organisation will settle suppliers directly and then claim such payments from the NMM=15 points</p> <p>Failure to submit= No points allocated</p>
<p>International Booking Capabilities</p> <p>TMC to submit a list of partners that they</p>	10	<p>5or more partners = 10 points</p> <p>2-4 partners = 5 points</p> <p>1 partner =2 points</p>

CRITERIA FOR EVALUATION	WEIGHT	BREAKDOWN OF POINTS
have agreements with for all international bookings		
TOTAL	100	

➤ **SUBMISSION OF TENDERS**

The bid submissions must be returned to the **Nelson Mandela Museum, Bhunga Building, Corner Nelson Mandela Drive & Owen Street, Mthatha.**

- Service providers are requested to furnish the NMM with two copies of their submissions (an original and a copy).
- Submissions are to be deposited in the allocated Tender Box clearly marked with reference and this bid's title.
- NMM will not be responsible for any submissions placed in an incorrect box and submissions left with the security officers or any employee of the NMM, which may lead to the submission not deposited into the tender box by the closing date.
- NO LATE, FAXED OR EMAILED QUOTATIONS SHALL BE ACCEPTED.
- **CLOSING DATE FOR THE SUBMISSION OF PROPOSALS IS**
14 August 2024 @ 12:00

➤ **DISCLAIMERS**

The NMM is not committed to any course of action as a result of its issuance of this bid document and/or its receipt of a bid in response to it. Please note that the NMM reserves the right to:

- modify the bid document's service(s) and request Respondents to re-quote on any changes;

- reject any bid submission which does not conform to instructions and specifications which are detailed herein;
- disqualify bids submitted after the stated submission deadline;
- not necessarily accept the lowest priced bid;
- cancel the tender

➤ **ENQUIRIES**

All communications and enquiries/requests for clarification relating to this proposal should be directed to the contact person:

FOR BID ADMINISTRATION & SERVICE PROVIDER SPECIFICATIONS
Ms M Mputa
Tel: 047 501 9504
Email: mihlali@nelsonmandelamuseum.org.za
SUPPLY CHAIN SPECIALIST
<i>Technical Enquiries:</i>
Mr M Msongelwa
Tel: 047 501 9507
Email: mandisi@nelsonmandelamuseum.org.za
CHIEF FINANCIAL OFFICER

All enquiries must be forwarded to the relevant NMM personnel by no later than 5 August 2024 @ 16:30.

Dr Vuyani Boo

Chief Executive Officer

A handwritten signature in black ink, appearing to be 'Vuyani Boo', written over a horizontal line.

