

CONTACT CENTRE CUSTOMER SERVICES & DEBT MANAGEMENT TRAINING PROGRAMMES

Briefing Session : 17 June 2014, 14h00
Linton House; Brooklyn Bridge
RFP No : RFP 26/2013
Closing Date : 08 July 2014, 11h00

Bid Evaluation Committee

Procurement

Project Manager – Professional Services

Commodity Leader – Professional Services

Finance Evaluator – Procurement Finance and HR Finance

BBBEE Specialist – Support Services

Operations Specialist – Governance, Compliance & Risk

SARS – Human Resources

Operational Specialists: HR – Learning & Development

Operational Specialists: HR Finance

SARS Contact Centre

Executive: – Debt and Account

Senior Manager: Debt Management

Manager: Capacity Management

Corporate Legal Services

Legal Specialist

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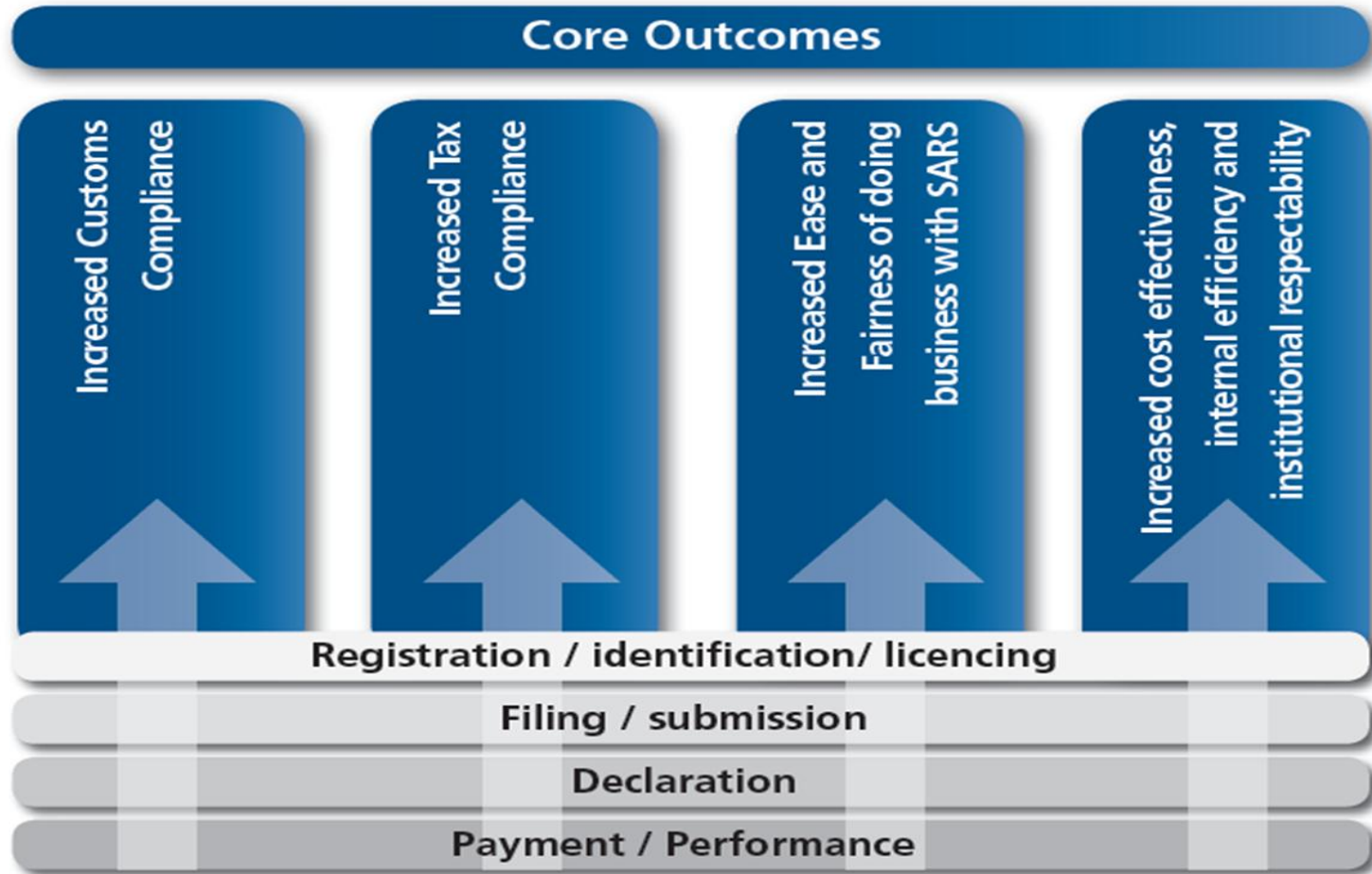
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Background

As an organ of state, SARS's mandate outlines its obligations towards the state and its people by:



Background continues

The SARS strategic intent directs the SARS Contact Centre Operations to ensure the following objectives are achieved:

- Taxpayer service
- Taxpayer education
- Enabling our people to perform at their peak

This mandate is pursued across

- All tax products including customs,
- As well as collecting outstanding tax debt.

In partnership with the SARS Learning Academy, the SARS Contact Centre identified a need to

- Develop and enhance the human capital skills and knowledge
- Build fiscal citizenship
- Enabling SARS Contact Centre staff to perform at their peak.

Background continues

In reviewing the SARS Contact Centre developmental and training requirements, a Capability Framework was designed to become the vehicle to successfully transform the effectiveness of contact centre strategies in pursuance of its mandate.

The following capabilities were identified as core skills requiring further development and enhancement in pursuant of the aforementioned mandate:

- ❑ Effective Communication;
- ❑ Customer Service; and
- ❑ Debt Recovery (Collection).

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Scope of Work

The training programme must be rolled out in a phased approach, as follows:

Phase 1

- ❑ Customisation of training material in consultation with the SARS Academy. The successful Service Provider is expected to develop and customize the training material in line with the SARS Contact Centre Operations Strategy and Capability Framework.
- ❑ The training material must meet the SAQA NQF level 3/4 accreditation.
- ❑ Handover of the of the customised course content, training manuals and facilitator toolkit to SARS.

Scope of Work

Phase 2

- ❑ Train the trainers i.e. assess and accredit the SARS internal facilitators.
- ❑ Provide a toolkit for the SARS internal facilitators.
- ❑ Training of the trainer sessions will be conducted centrally (Gauteng)
- ❑ Assessment and accreditation of the SARS internal facilitators
- ❑ The successful Service Provider must provide facilitation and co-facilitation services
- ❑ SARS will take full ownership of the training programme
- ❑ The successful Service Provider will be required to provide assessments and post-training evaluation tools and on-the-job support to the SARS Contact Centre
- ❑ Ensuring that the training interventions provided deliver a Return on Investment
- ❑ Support the SARS Quality Management System which will embed the skills gained into an enhanced quality management framework.

Scope of Work

Phase 2 (continue)

- ❑ The successful Service Provider will be required to provide certificate of attendance and competence upon successful completion.
- ❑ The successful Service Provider through consultation with SARS will provide a training plan, conducive to SARS operations, with clear timelines and milestones, allowing for flexibility due to operational requirements.

Scope of Work: Customer Service and Debt Recovery (5 days)

Course	Learning Outcomes
<ol style="list-style-type: none">1. Excellence in Customer Service2. Managing difficult Customers3. Managing Customer Contacts with Quality4. It's All About the Customer5. An Agent's Role in Contact Centre Success6. Debt Recovery	<ul style="list-style-type: none">• Managing Difficult and Demanding Contacts interactions• Managing Customer Contacts with Quality• Controlling the Call• Customers' Expectations in a Contact Centre Environment• You Make a Difference• Key Performance Objectives for Individuals• Making contact with a debtor• Debt Collector Code of Conduct

Training Sessions and Delivery Address

	Alberton	Bellville	Doringkloof	Durban	Total
Contact Centre - Customer Service Training					
Maximum Delegates per Session	20	20	20	20	20
Full Facilitation (No. of sessions Per Centre)	7	7	5	6	25
Co-Facilitation (No. of sessions per centre)	4	4	3	3	14
Contact Centre - Debt Recovery Training					
Maximum Delegates per Session	20	20	20	20	20
Full Facilitation (No. of Sessions per centre)	4	3	2	3	12
Co-Facilitation (No. of sessions per centre)	2	1	2	1	6
Estimated Delegates					1140

EXPECTED DELIVERY DATE (Phase Two)

- The expected commencement for the customer service and debt recovery training to learners and facilitators is January/February 2015.

STANDARD OF LEARNING MATERIAL

- The learning materials and content for SARS Contact Centre customer service and debt recovery courses should be aimed at SAQA NQF 3/4.

Technical Requirements

The Service Providers are required to:

- Provide a summary of the Entity experience in developing, customising and providing Contact Centre and/or Debt Recovery training programmes and clearly indicate the number of years of experience in providing training services;
- Provide testimonials from three (3) contactable current/recent (within the past 3 years) customers to whom similar training was provided and whom SARS may contact for site visit. The testimonial must include: company name, contact name, address, phone number, and duration of contract, a brief description of the services and the level of satisfaction;
- Provide a proposed implementation plan of phase 1 with clear timelines and milestones in accordance with the expected delivery date referred to in section 9.2.2;
- Provide a 1 page Curriculum Vitae of each Facilitator/Trainer and certified copies of all relevant qualification documents. Facilitators must have five (5) years or more relevant experience in providing contact centre training programmes and possess relevant experience;

Technical Requirements (cont.)

The Service Providers are required to:

- Indicate the method of delivery and the capability to deliver through the blended method of learning. Further, indicate the provisions in place to train learners with special needs;
- Provide accreditation for qualification offered (if accredited course);
- Indicate the capacity to deliver multiple training sessions at the different SARS venues;
- Provide a sample of previous progress reports during a training period, consolidated close out report at the end of the program;
- Provide a post-training evaluation framework and on-the-job support that SARS may utilise to measure the learning intervention.
- Provide a draft high level proposal of the course outline aligned to learning outcomes for both contact centre customer services and debt management training programme.

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RFI Timelines

ACTIVITY	DUE DATE
RFP Advertisement in Sunday Times	08 June 2014
RFP Advertisement in Government Bulletin	06 June 2014
Tender documents on SARS website	09 June 2014
Compulsory briefing session	17 June 2014, 14H00
Questions relating to RFP	2 July 2014
RFP Closing Date	08 July 2014, 11h00
Notice to bidders	SARS will endeavour to inform bidders of the progress until conclusion of the tender

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Bid Evaluation Process

Gate 0

Pre-Qualification

- Tax Clearance Certificate SBD 2
- Invitation to Bid SBD 1
- Response to Bid Letter
- GCC
- SARS Oath of Secrecy
- Declaration of interest SBD 4
- Preference Point Claim form- SBD 6.1
- Declaration of Bidder's Past SCM Practices – SBD 8
- Certificate of Independent Bid Determination – SBD 9
- Service Provider Compliance Form for Technical Evaluation
- Audited/Reviewed Annual Financial Statements for three reporting periods
- Proof of Institutional Accreditation with the relevant ETQA as required by SAQA

Gate 1

Desktop Technical Analysis

70 points

Presentation and Onsite Reference Check

30 points

Top 5 bidders to Achieve 46 points of 70

Overall score of 66 points to proceed to Gate 2

- Experience of the service providers
- Capability (Knowledge and Skills)
- Capacity
- Course offering
- Delivery of the service
- Method of delivery
- Intellectual Property
- Presentation and onsite reference check

Annexure A,

Gate 2

BEE

Scored

Price

Scored

- BEE certificate
- Pricing Schedule – Annexure B

Annexure B
(Pricing Schedule)

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Pricing Schedule

SARS BBEE Requirements

Classification	Turn Over	Submission Requirement
Exempted Micro Enterprise (EME)	Below R5 million p.a	Certified Copy of BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA or a letter from an Accounting Officer as contemplated in the CCA
Qualifying Small Enterprise (QSE)	Between R5 million and R35 million p.a	Certified Copy of BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA
Large Entity (LE)	Above R35 million p.a	Certified Copy of BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA

Joint Ventures and Consortiums (JV's collectively)

Incorporated JV's must submit the B-BBEE status of the entity. Unincorporated JV's must submit a consolidated B-BBEE scorecard as if they were a group structure for every separate tender.

Submit SBD 6.1

BBEE Key Sections to complete in SBD 6.1

6. BID DECLARATION

6.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

7. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1

7.1 B-BBEE Status Level of Contribution: =(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).

8. SUB-CONTRACTING

8.1 Will any portion of the contract be sub-contracted? YES / NO (delete which is not applicable)

8.1.1 If yes, indicate:

- (i) what percentage of the contract will be subcontracted?
- (ii) the name of the sub-contractor?
- (iii) the B-BBEE status level of the sub-contractor?
- (iv) whether the sub-contractor is an EME? YES / NO (delete which is not applicable)

Points Awarded for BBEE Contribution

B-BBEE Contributor Level	Number of Points (80/20 system)	Number of Points (90/10 system)
1	20	10
2	18	9
3	16	8
4	12	5
5	8	4
6	6	3
7	4	2
8	2	1
Non-Compliant Contributor	0	0

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Service Level Agreement

Service Providers are requested to:

- Comment on the terms and conditions set out in the Services Agreement and where necessary, make proposals to the terms and conditions;
- Each comment and/or amendment must be explained; and
- All changes and/or amendments to the Services Agreement must be in an easily identifiable colour font and tracked for ease of reference.
- SARS reserves the right to accept or reject any or all amendments or additions proposed by a Service Provider if such amendments or additions are unacceptable to SARS or pose a risk to the organisation.

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Bid Submission

Bidders must submit copies of each file (Original and Duplicate) and a CD-ROM of Categories in which they tendered



TENDER BOX

SARS Brooklyn Bridge, 570 Fehrsen Street, Linton House, Brooklyn

Any enquiries must be referred, in writing via email to:
rft-professionalservices@sars.gov.za or tenderoffice@sars.gov.za

File 1: Prequalification-Original/Duplicate

Exhibit 1

- Pre-Qualification documents
- Proof of Institutional Accreditation



Exhibit 2

- Service Provider Compliance Checklist for the Technical Evaluation
- Response to Technical Requirements
- Supporting documents for the technical responses
- References/testimonials



Exhibit 3

- Company profile
- Supplementary information



Exhibit 4

- General Conditions of Contract (GCC)
- Draft Services Agreement
- Risk & Responsibility Matrix



File 2 : Price and BEE Response

Exhibit 1

- BBBEE Certificate



Exhibit 2

- Pricing Schedule
- Three (3) years audited/reviewed financial statements



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