**aNNEXURE A2: Bidder TECHNICAL Compliance Checklist**

**BIDDERS NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Example of how to complete the compliance checklist:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Section**  **No.** | **Technical Criteria** | **Compliant** | **Partially Compliant** | **Non -Compliant** | **Reference page in Proposal** | **Comments** |
| 9.3.1.1 | The company’s years of experience and organisational structure to render the employee assistance programme services as outlined in 9.2. | **EXAMPLE** |  |  | Pg. |  |
| 9.3.2.1 | The Bidder has to provide full contact details of a Key Account Manager, with a minimum of three (3) years of experience who will be assigned to SARS including:  - one-page CV, containing his/her qualifications (certified copy of certificates). |  |  |  | Pg. | Bidder to state reason for partial compliance |

**Please refer to section 9 to complete this form. The form must be submitted in File 1, Exhibit 2**

| **No.** | **Technical Evaluation Criterion** | **Compliant** | **Partially Compliant** | **Non-Compliant** | **Reference page in Proposal** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- |
| **1.** | **Company Profile, Infrastructure and Resources** |  |  |  |  |  |
| **1.1** | The company's years of experience to render the employee assistance programme services as outlined in 9.2. |  |  |  |  |  |
| **2.** | **Resources** |  |  |  |  |  |
| **2.1** | The Bidder has to provide full contact details of a Key Account Manager, with a minimum of three (3) years of experience who will be assigned to SARS including:  - one-page CV, containing his/her qualifications (certified copy of certificates). |  |  |  |  |  |
| **2.2** | The bidder(s) has to provide curriculum vitaes and proof of registration with HPCSA and SACSSP for a minimum of ten (10) call centre consultants. The curriculum vitae and proof of registration should be submitted for each call centre consultant. |  |  |  |  |  |
| **2.3** | The bidder (s) has provided a minimum of two curriculum vitaes of persons/team responsible for undertaking qualitative and quantitative research/ surveys and compiling reports. CV's must show qualification in research, data or statiscal analysis and interpretation with the minimum of three years of experience in report writing. |  |  |  |  |  |
| **3** | **Psychosocial Awareness Session and Capacity Building** |  |  |  |  |  |
| **3.1** | The bidder(s) has to provide curriculum vitaes of minimum of four (4) qualified counsellors/clinical psychologists, social workers to facilitate psychosocial awareness sessions and train - the - trainer. CV should include the following:  • Name and Surname  • Relevant qualification ( attach copy of certificate)  • Years of experience in counselling |  |  |  |  |  |
| **3.2** | The bidder(s) has to provide samples of proof of previously generated examples of Psycho-social awareness sessions material in line with paragraph 9.2.1.2 of the main RFP document. |  |  |  |  |  |
| **3.3** | The bidder(s) has to provide samples of proof of previously generated examples of Train- the - trainer material in line with paragraph 9.2.2.2 of the main RFP document. |  |  |  |  |  |
| **4** | **National Footprint** |  |  |  |  |  |
| **4.1** | Provide a summary of the bidder's database of network of affiliate’s across the nine (9) regions by completing all columns in **Annexure C1**. The bidder to confirm that national footprint can provide services in line with the minimum ratio of 1: 30 (Affiliates against SARS Regional headcount) per each region (Refer to Table 9A for SARS Head Count per region). The qualified clinical/counselling psychologists, registered counsellors and social workers should be scattered in all areas where employees and family members can easily access the sessions at the affiliate’s practice rooms that are closer to place of residence or work.  Bidder must be able to offer services in the eleven official languages and including South African sign language (where possible). |  |  |  |  |  |
| **5.** | **Reports** |  |  |  |  |  |
| 5.1 | The bidder(s) has to provide sample of proof of previously generated ad-hoc, monthly, quartely and annual reports for employee assistance programme. The reports must reflect following: • Statistics and calculations  • Uptake & Utilisation  • Themes and trends  • Benchmarking  • Training and interventions  • Conclusions and recommendations |  |  |  |  |  |
| **6.** | **Marketing and Awareness** |  |  |  |  |  |
| **6.1** | The bidder(s) has to provide samples of proof of previously generated examples of posters, wallet cards, brochures, pamphlets, booklets, handbooks and any other branded communication material utilized at other companies. |  |  |  |  |  |
| **6.2** | The bidder(s) has to provide sample of proof for previously generated examples of project plan coordinated and implemented Health Calendar Days Campaigns in line with the National Health Calendar in section 9.2.9 of the RFP. |  |  |  |  |  |
| **7.** | **Specialised Intervention** |  |  |  |  |  |
| **7.1** | The bidder(s) has to submit CV's of pre-approved list with a minimum of six (6) recommended financial consultants (who are regsitered to provide advisory and debt management services) for the duration of the contract. The Bidders submission should include the following:  Valid FAIS certificate for each recommended financial advisor/consultant  A cv indicating years of experience in providing financial advise |  |  |  |  |  |
| **8** | **Monitoring and Evaluation** |  |  |  |  |  |
| **8.1** | The bidder(s) must submit to SARS proof/examples for previously generated example of client satisfaction survey. |  |  |  |  |  |
| **9.** | **Record Keeping and Document Management** |  |  |  |  |  |
| **9.1** | Ensures that electronic, as well as paper-based, confidential client information, will be stored and maintained safely; |  |  |  |  |  |
| **9.2** | Administrative process / procedure for audit purposes and managing all records, is efficient and effective; and |  |  |  |  |  |
| **9.3** | Ensures that document management processes and procedures (i.e. retention of records and destruction) are in place. |  |  |  |  |  |
| **10** | **Reference Letters** |  |  |  |  |  |
| **10.1** | Provide reference letters from at least three (3) contactable clients,on a company letter head, to whom similar services have been provided to in the past five (5) years. The reference letters must include: company name, contact person name and designation, phone number, email address, duration of contract, a brief description of the services rendered and the level of satisfaction with the service rendered. |  |  |  |  |  |
| **11** | **Presentation** |  |  |  |  |  |
| **11.1** | The bidder(s) has demonstrated the operational capability including methodology, approach and process to execute an all-inclusive package of Employee Assistance Programme as specified in the SARS scope of work. |  |  |  |  |  |
| **11.2** | The bidder(s) to demonstrate the capability to integrate information from trend report and recommend customised intervention to address identified risk. |  |  |  |  |  |