**RFP 0051/2021: APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION OF MARKETING AND ADVERTISING SERVICES**

**aNNEXURE A1: 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** |
| 8.3.1 | Summary of the bidder’s experience in implementation | **EXAMPLE** |  |  | Pg. |  |
| 8.3.2 | Detailed approach on how the project will be executed |  |  |  | Pg. | Bidder to state reason for partial compliance |
| 8.3.3 | Provide a 1-2 page resume and certificates of each resource |  |  |  | Pg. | Bidder to state reason for non-compliance |

**Please refer to section 11 of the RFP document 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** |  |  |  |  |  |
| **a.** | Company profile and clearly indicate-   * Company’s years of experience in providing marketing and communication services; |  |  |  |  |  |
| * Infrastructure to be able to communicate with SARS and OTO whether the SARS and OTO team is working remotely or in the office (by having e.g. laptops, tablets, cell phones and systems in place to connect virtually e.g. zoom, MS teams and WebEx) to render the services |  |  |  |  |  |
| **b.** | Indicate a range of in-house services provided specific to marketing and advertising |  |  |  |  |  |
| **2.** | **Retainer Resources** |  |  |  |  |  |
|  | Bidder must provide the following retainer resources which will be assigned to SARS: |  |  |  |  |  |
| **a.** | • Strategist Director with a minimum of 10 years of proven experience in marketing, communication, and advertising with 5 years of experience being in the financial sector; |  |  |  |  |  |
| **b.** | • Senior Client Service Director with a minimum of 10 years of proven experience in marketing, communication and advertising with 5 years of experience being in the financial sector; |  |  |  |  |  |
| **c.** | • Client Service Support Person with a minimum of 10 years of proven experience in marketing, communication and advertising with 5 years of experience being in the financial sector; |  |  |  |  |  |
| **d.** | • Traffic Manager with a minimum of 5 years of proven experience in marketing, communication and advertising with 2 years of experience being in the financial sector; |  |  |  |  |  |
| **e.** | • Senior Creative Person with a minimum of 8 years of proven experience in creativity with 4 years of experience being in the financial sector; |  |  |  |  |  |
| **f.** | • Art Person with a minimum of 5 years of proven experience in design; |  |  |  |  |  |
| **g.** | • Copywriter with a minimum of 5 years of proven experience in copy writing; |  |  |  |  |  |
| **h.** | • Researcher with a minimum of 10 years of proven experience in market research; and |  |  |  |  |  |
| **i.** | • Graphic designer with a minimum of 5 years of proven experience in graphic design |  |  |  |  |  |
| **3.** | **Capability** |  |  |  |  |  |
| **a.** | Bidder must provide a schedule of the previous experience and proven track record over the past four (4) years, to that end, Bidders must submit the following (for a minimum of 3 clients):  • Client name  • Description of a project / campaign  • Contract period  • Value of the project  • Challenges and how they were resolved and  • Value-added services. |  |  |  |  |  |
| **4.** | **Testimonials** |  |  |  |  |  |
| **a.** | Bidders are required to submit testimonials (not older than 5 years) from two (2) clients listed on 3 above where similar services were provided. Each testimonial must include but not be limited to:  • Client name  • Contact person, phone number, email address, company business address  • A brief description of the full services rendered  • Value of the project  • Quality of service  • Quality of reports provided  • Whether work was completed within budget or not |  |  |  |  |  |
| **5.** | **SARS Brand** |  |  |  |  |  |
|  | Compile a one-page document demonstrating an understanding of SARS and Office of the Tax Ombud (in not more than 500 words on MS Word): |  |  |  |  |  |
| a. | An understanding of the SARS and Office of the Tax Ombud (OTO) brand and their mandate |  |  |  |  |  |
| **b.** | An understanding of challenges facing the SARS and Office of the Tax Ombud brand and how these could be addressed. |  |  |  |  |  |
| **6.** | **Skills Transfer** |  |  |  |  |  |
| **a.** | Bidders must submit a skills transfer plan that demonstrate their approach to ensure skills and knowledge transfer to nominated SARS staff during post-campaign implementation reviews of each campaign. The skills transfer plan must contain the following minimum details:  • Skills transfer methodology plan with outcomes or deliverables contemplated.  • Details of how the Successful Bidder will report to SARS and OTO on progress made; and  • Details of how the SARS and OTO Communication teams, who participate in the skills transfer program, will be assessed to determine their comprehension of skills transferred. |  |  |  |  |  |
| **7.** | **Case Study** |  |  |  |  |  |
|  | Bidders are required to submit a case study of a previous campaign undertaken in the past three years (3) in the financial sector or the service industry. The case study should include: |  |  |  |  |  |
| **a.** | Campaign strategy |  |  |  |  |  |
| **b.** | Approach used to execute the campaign |  |  |  |  |  |
| **c.** | Return on Investment that the Bidder secured for the client |  |  |  |  |  |
| **d.** | Showreel demonstration of creative execution through-the-line |  |  |  |  |  |