**aNNEXURE A 2: Bidder TECHNICAL Compliance Checklist**

**The form must be submitted in File 1, Exhibit**

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| **No** | **Technical Criteria** | **Compliant** | **Partially Compliant** | **Non-Compliant** | **Reference in the RFP Doc.** | **Comments** |
| **1** | **Project Support** | | | | | |
| 1.1 | Demonstrate experience in the provision of employee engagement surveys by indicating:   * Number of years of relevant experience in providing research services. * Number of years of experience in conducting employee surveys and related services. * The name(s) of at least three (3) recent contactable customers, in the past five (5) years, with similar organisational structures as SARS, whom we may contact for references. Bidders must include: company name, contact name, address, phone number, duration of contract, a brief description of the services rendered. |  |  |  | Refer to section 9.2.1 |  |
| 1.2 | Provide proof of membership to a reputable professional research body (e.g. Southern African Marketing Research Association SAMRA). |  |  |  | Refer to section 9.2.1 |  |
| 1.3 | Provide the approach, processes and methodology that will be applied by demonstrating the alignment to the SARS requirements and scope of work. |  |  |  | Refer to section 9.2.1 |  |
| 1.4 | Demonstrate the capability and capacity to deliver the service by indicating:   * Resources and competency level of the project team to be assigned to SARS. Provide resumes illustrating profiles of the dedicated project team. * Years of experience in providing the technical support service for Employee Engagement Survey. * Support centre - Indicate the resources available to assist with queries. * Turnaround time/response time – indicate the turnaround times to resolve any query. * Indicate the number of dedicated project team members that will be assigned to SARS. * Demonstrate the ability to provide a 2 day train the trainer session on the reporting tool and the requirements and compliance standards before training commences. Give a brief overview of training content. |  |  |  | Refer to section 9.2.1 |  |
| 1.5 | Demonstrate that the proposed system will meet SARS requirements as outlined in section 9.2.3   * Ability to generate emails * Email invitations * Send reminders   Generate updated management information at every stage of the process. |  |  |  | Refer to section 9.2.3 |  |
| **2** | **Survey Administration and IT Infrastructure** | **Compliant** | **Partially Compliant** | **Non-Compliant** | **Reference in the RFP Doc.** | **Comments** |
| 2.1 | Give a detailed description of the proposed survey tool and capability that is in line with the SARS IT requirements and is capable of handling questionnaires consisting of +100 items and 11 dimensions. Provide sample screen dumps of the survey tool. |  |  |  | Refer to section 9.2.7 |  |
| 2.2 | Demonstrate systems capability and compatibility in relation to the following:   * Secure access to survey * System recognition of individual respondent’s i.t.o. SARS employee * Flexibility in completion of the survey (e.g. Allowing the employee to save and continue later) * System compatibility to Jaws in order to cater for the visually impaired employees. |  |  |  | Refer to section 9.2.8 |  |
| 2.3 | Provide evidence that the proposed system complies and meets SARS requirements as outlined in section 9.2.8. This includes:   * + 1. Indicate which hosting arrangement the system complies with; either as specified in 9.2.8.1     2. In response to 9.2.8.1, indicate which operating environment is supported by the solution.     3. Indicate compliance with 9.2.8.2 (Yes/No)     4. Indicate compliance with 9.2.8.3 (Yes/No)     5. In terms of 9.2.8.4, indicate the nature and extent of support required from SARS     6. Indicate compliance with 9.2.8.5 (Yes/No)     7. Indicate compliance with 9.2.8.6 (Yes/No). If no, indicate the actual system availability     8. Indicate compliance with 9.2.8.7 (Yes/No). If no, describe the impact on the user in the event of system failure     9. indicate compliance with 9.2.8.8 (Yes/No).     10. Indicate compliance with 9.2.8.9 (Yes/No).     11. In response to 9.2.8.10, provide evidence of how data will be destroyed.     12. Indicate compliance with 9.2.8.11 (Yes/No)     13. Demonstrate that your solution will be compatible to the SARS IT landscape in 9.2.9   Illustrate the complete operating environment by means of a schematic, illustrating the solution components. |  |  |  | Refer to section 9.2.8 and 9.2.9 |  |
| **3** | **Data Analysis, Reports, Presentation and Action Planning** | **Compliant** | **Partially Compliant** | **Non-Compliant** | **Reference in the RFP Doc.** | **Comments** |
| 3.1 | Provide evidence and samples of previously produced reports in accordance with SARS requirements as outlined in section 9.2.4.  Indicate if the provider will be able to produce adhoc reports as and when required. |  |  |  | Refer to section 9.2.4 and 9.2.5 |  |
| 3.2 | Demonstrate the effectiveness of the proposed interactive reporting tool and indicate if the proposed reporting tool provides best practice recommendations. |  |  |  | Refer to section 9.2.4 and 9.2.5 |  |
| 3.3 | Indicate what quality assurance measures/ processes/ systems are in place to ensure reliability and validity of data. |  |  |  | Refer to section 9.2.4 and 9.2.5 |  |
| 3.4 | Describe how will the impartation of knowledge to the SARS Employee Engagement Team be done (skills transfer)?   * Interpret the report * Present the findings * Generate action plans   Implement improvement plans |  |  |  | Refer to section 9.2.4 and 9.2.5 |  |
| 3.5 | Indicate if a Senior Project member will be available to present executive summary of survey results to SARS EXCO after each survey. Willingness and flexibility to be available as and when required according to SARS changing needs. |  |  |  | Refer to section 9.2.4 and 9.2.5 |  |
| **4** | **Implementation Plan** | **Compliant** | **Partially Compliant** | **Non-Compliant** | **Reference in the RFP Doc.** | **Comments** |
| 4.1 | Provide a detailed implementation plan/project timelines encompassing all project management principles for the delivery of the survey. |  |  |  | Refer to section 9.2.6 |  |