**aNNEXURE A3: 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 |

**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.** | **METHODOLOGY & SAMPLES FRAME** |  |  |  |  |  |
| **1.1** | Bidder must demonstrate the examples of various methods and technologies to gather information for the quantitative approach. |  |  |  |  |  |
| **1.2** | Relevance of methods used to gather information against other research methods |  |  |  |  |  |
| **2.** | **ANALYSIS** |  |  |  |  |  |
| **2.1** | Bidder to demonstrate step by step (process) how data will be collected, prepared/processed to ensure its accuracy and integrity for the following categories:  1. Descriptive analysis  2. Correlation analysis  3. Thematic analysis  4. Factor analysis |  |  |  |  |  |
| **3.** | **DEMONSTRATE THE ABILITY TO DELIVER ON THE PRIMARY OBJECTIVES** |  |  |  |  |  |
| **3.1** | Bidder to demonstrate the understanding of the drivers/factors that explain tax compliance. |  |  |  |  |  |
| **3.2** | Bidder to demonstrate expert knowledge, understanding and the step by step process of constructing an Attitude to Tax Compliance Index |  |  |  |  |  |
| **4.** | **RESOURCES AND PROJECT MANAGEMENT** |  |  |  |  |  |
| **4.1** | Bidder to demonstrate that the Project Manager has a minimum of 6 years of project management experience in conducting public opinion surveys. |  |  |  |  |  |
| **4.2** | Bidder to provide and show that the team (key personnel) to be assigned to the project has the relevant qualifications (Relevant Degree, Diploma or equivalent, minimum NQF 6) and experience in research and analysis with combined experience of between 10 to 15 years. |  |  |  |  |  |
| **4.3** | Bidder to show that they have a team with required experience for successful project implementation ( field work, data analytic software, data collection , capturing and mining, presentation and report writing). |  |  |  |  |  |
| **4.4** | Bidder to show the reporting mechanism that will be put in place and frequency of meetings or reporting. |  |  |  |  |  |
| **4.5** | Bidder to provide high level project plan (36 months) and a detailed project plan for the (12 months). |  |  |  |  |  |
| **5.** | **CLIENT REFERENCES/ TESTOMONIALS** |  |  |  |  |  |
| **5.1** | The bidder must provide testimonials of relevant experience to the scope of work and proven track record over the past three (3) years.  The schedule must include a (minimum of 3) clients for the following:  \*  Client Name;  \*  The client contact person and number;  \*  Contract period;  \*  Description of the services;  \*  Challenges; Please specify the challenges you overcame  \*  Value added services; and  \*  Testimonials from the clients listed on the schedule. |  |  |  |  |  |
| **6.** | **Presentation Criteria**  **Technical Support** |  |  |  |  |  |
| **6.1** | Bidder must systematically demonstrate how to collect national data on an (annual) basis on the role of public opinion in driving tax compliance |  |  |  |  |  |
| **6.2** | Bidder to demonstrate how they will design a full representative sample (by province, race, gender, income). |  |  |  |  |  |
| **6.3** | The bidder must demonstrate a detailed process of constructing an Attitude To tax Compliance Index using the following themes:  1. Tax Morality  2. Accessibility  3. Trustworthiness  4. Followership  5. Operational Efficiency |  |  |  |  |  |
| **6.4** | The Bidder must demonstrate the ability to provide raw data in a compatible format to SARS with all explanatory notes and definitions of codes. |  |  |  |  |  |
| **6.5** | The bidder must provide a detailed knowledge and skills transfer implementation plan which includes a roll out of the plan |  |  |  |  |  |