**RFP 0045/2021: APPOINTMENT OF A PANEL OF SERVICE PROVIDERS FOR DEBT COLLECTION AND RELATED 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 9 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:  o Company’s years of experience in providing debt management services; and  o Infrastructure to be able to communicate with SARS whether the SARS 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.** | Minimum of 3 clients in the last 3 years; |  |  |  |  |  |
| **c.** | Minimum of 20 contact centre seats; |  |  |  |  |  |
| **d.** | Amount of time required by the bidder to commence with the services once appointed |  |  |  |  |  |
| **e.** | Full details of the Directory reporting to the COO/CEO (dedicated Account Manager), who will attend regular supplier review meetings between the bidder and SARS |  |  |  |  |  |
| **2.** | **Testimonial** |  |  |  |  |  |
| **a.** | Provide testimonials from at least three (3) contactable clients for whom similar services have been provided to in the past five (5) years. |  |  |  |  |  |
| **b.** | Bidder is required to complete Annexure A3 by providing the following |  |  |  |  |  |
| **3.** | **Collection Process, Technology and Reporting** |  |  |  |  |  |
| **a.** | Collection process implemented by the bidder in ensuring that debt is collected efficiently and ethically. The collection process includes but is not limited to: process and tools covering the cleansing of data, data manipulation tools, tracing tools, account management system, outbound call system, inbound with voicemail and other tools, call recording system, quality control system and document management system, performance management system, steps and touch times concluded. |  |  |  |  |  |
| **b.** | Indicate that the processes are efficient i.e. with a maximum of two (2) months Turn-Around-Time. |  |  |  |  |  |
| **c.** | Indicate frequency of monitoring and reporting. |  |  |  |  |  |