

ANNEXURE B: DETAILED TECHNICAL EVALUATION CRITERIA

No.	Technical Evaluation Criterion	Weight	Breakdown
1	Company Profile	6	
	The Bidders should provide in their response to SARS, detailing the following:		
1.1	An indication of years of experience actively involved in the medical aid brokerage industry;	6	More than 5 years experience in the medical aid brokerage industry = 6 points More than 2 years but less than 5 years experience in the medical aid brokerage industry = 3 points Less than 2 Years experience in the medical aid brokerage industry = 0 points
2	Capability	30	
2.1	Bidder Clients	15	
2.1.1	<p>Bidders must provide in their response, a client list where they are currently providing medical aid broker services. Bidders should provide this information by completing Annexure A. The reference information for each client provided must include the following:</p> <ul style="list-style-type: none"> • Company Name; • Contact Person; • Size of the company; • Phone numbers; • Business address; • Duration of the contract; and • Brief description of the services provided. <p>Please note that SARS may contact the clients for a reference check. It is important to ensure that the clients listed by the Bidder are contactable.</p>	15	<p>Bidder has provided details of a minimum of 3 clients or more = 3 points Bidder has submitted details of 2 clients = 2 points Bidder has submitted details of 1 client = 1 points Bidder has submitted no client details = 0 points</p> <p>Bidder has identified 3 clients with 10 000 employees or more = 12 points Bidder has identified 2 clients with 10000 employees or more = 8 points Bidder has identified 1 client with 10000 employees or more = 4 points Bidder has identified client with less than 10000 employees = 0</p>
2.2	Key Personnel	15	
2.2.2	<p>The Bidders must provide amongst its staff, Key Personnel to be allocated to the SARS account. SARS considers the Key Personnel crucial to the successful delivery of services. The Bidder's submission must contain/indicate the following for these allocated personnel:</p> <ul style="list-style-type: none"> • Valid proof of FAIS registration; and • Valid proof of Council for Medical Schemes (CMS) accreditation; and • Years of medical aid brokerage experience. <p>SARS may verify the validity of the above information with the respective accreditation bodies.</p>	15	<p>9 qualifying (FAIS and CMS certified or Accredited or Registered) staff members or more staff with 5 personnel having a minimum of 5 years medical broker experience = 15 points Between 5 to 9 qualifying (FAIS and CMS certified) staff with 3 personnel having a minimum of 5 years medical broker experience = 8 points Less than 5 personnel = 0 points</p>
3	National Footprint	10	
3.1	<p>The Bidder must share and confirm that they will be able to provide the services as per SARS footprint indicated in paragraph 9.2.6.</p> <p>For proof of physical presence, the Bidder should submit one of the following documentation:</p> <ul style="list-style-type: none"> • Proof of address or ; • Lease agreement or ; • Water bill or ; • Electricity bill. <p>For proof of virtual communication tools, the Bidder must submit one of the following documentation:</p> <ul style="list-style-type: none"> • Subscription or • Licenses or ; • Agreement. 	10	<p>Bidder submitted proof that they have physical presence in the below major cities Western Cape: Cape Town = 2 Kwazulu Natal: Durban = 2 Gauteng: Pretoria or Johannesburg = 2 Non of the above major cities = 0</p> <p>The Bidder has the means to virtually do presentation or attend to individual queries through modern virtual communication tools (zoom, Webex, Ms Teams) in all 9 provinces = 4 The Bidder has the means to virtually do presentation or attend to individual queries using other tools of communication in all 9 provinces = 1 The Bidder has no virtual communication tools = 0</p>
4	Customer Relationship Support Systems	19	
	The Bidder must provide a short description supported by a screen dump for each of the following:		
4.1	Existing customer relationship management (CRM) system;	4	Short description with screen dump provided = 4 points One of the requested information = 2 Short description not provided = 0 points
4.2	Web functionality;	3	Short description with screen dump provided = 3 points One of the requested information = 1.5 Short description not provided = 0 points
4.3	Self-service functionality;	3	Short description with screen dump provided = 3 points One of the requested information = 1.5 Short description not provided = 0 points
4.4	Virtual communication;	3	Short description with screen dump provided = 3 points One of the requested information = 1.5 Short description not provided = 0 points
4.5	Contact centre facility; and	3	Short description with screen dump provided = 3 points One of the requested information = 1.5 Short description not provided = 0 points
4.6	Bulk SMS functionality.	3	Short description with screen dump provided = 3 points One of the requested information = 1.5 Short description not provided = 0 points
5	Year End Revision Services	15	
5.1	<p>The Bidder must submit a comprehensive project plan to cover all offices for year-end revision facilitation of information sessions and/or presentations regarding product options and benefits, taking into consideration the following:</p> <ul style="list-style-type: none"> • Headcount of employees; • Locations of SARS offices; • Operating hours; • Reaching employees at SARS premises, working from home and remotely from other locations. • Business operational demands (e.g. contact centre); • Preferential provision for executive consultation; and • Ability to render the service in multiple sites at the same time within the project timelines taking into account agreed implementation deadlines. 	15	<p>Bidder submitted a comprehensive project plan meeting all requirements to provide year end revision services to all SARS offices = 15 points Bidder submitted a comprehensive project plan for some of the criteria and less detail for some = 8 points No plan or demonstration provided = 0 points</p>
6	Wellness Days	20	
6.1	<p>The Bidder must submit a detailed proposal on how they will, facilitate and coordinate Wellness Days in collaboration with SARS Wellness as per agreed project timelines or as when the need arises or in the event of unexpected required circumstances, which includes but not limited to:</p> <ul style="list-style-type: none"> • Health screening on wellness days; • Provision of health information material (e.g. health passports, brochures, leaflets, posters and so forth); • Provision of onsite group information sessions during the wellness days; • Engaging with other medical aids outside of SARS preferred medical aids to accommodate employees who are not on SARS preferred medical aid schemes during wellness days; • Identifying and engaging employees with chronic conditions through the wellness days and encouraging them to register on the relevant medical aid chronic disease management programme; • Health calendar days (e.g. world AIDS day); and • Executive wellness days screening. 	20	<p>Bidder has submitted a detailed proposal on how they will facilitate and administer SARS initiated wellness days as per paragraph 9.2.3 of the main RFP document: Detailed proposal provided for screening on wellness days = 4 Partial information provided = 2 Poor or no proposal details submitted = 0</p> <p>Detailed proposal on how health material will be distributed = 3 Partial information provided = 1 Poor or no proposal details provided = 0</p> <p>Detailed proposal on how group information sessions will be offered = 3 Partial information provided = 1 Poor or no proposal details provided = 0</p> <p>Detailed proposal on how supplier will engage with medical aids outside SARS preferred medical aids = 3 Partial information provided = 1 Poor or no proposal details provided = 0</p> <p>Detailed proposal on how bidder will identify and engage employees with chronic conditions during wellness days = 3 Partial information provided = 1 Poor or no proposal details provided = 0</p> <p>Detailed proposal on how the bidder will facilitate executive wellness days = 4 Partial information provided = 2 Poor or no proposal details provided = 0</p>
	Total Points	100	