**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.** | **9.4.1. Company Profile, Infrastructure and Resources** |  |  |  |  |  |
| 1.1 | The Bidders should provide  A comprehensive company profile, organisational structure and detailed infrastructure to render the services as outlined in 9.3. The comprehensive company profile must include: |  |  |  |  |  |
| a) | A brief agency history; and |  |  |  |  |  |
| b) | Current billing client list, type of industry serviced, annual media spend, number of years each account was held over the last 5 years, list of clients lost over the past three years, the reason for account moving |  |  |  |  |  |
| 1.2 | Full name and contact details (landline, cell-phone and email address) of key account person, level of expertise of the individual including (qualifications, experience relevant to the scope of services) in these areas:   * Media planning/buying; * Account management; * Strategy; and * Research |  |  |  |  |  |
| 1.3 | Curriculum vitae of at least four (4) members in the proposed team. The team must have experience in the field of expertise such as media strategy, media planning, media buying, research, analytics, etc. and a list of their previous clients and current clients.; and |  |  |  |  |  |
| 1.4 | Disaster Recovery Plan and Business Continuity Plan to ensure a seamless or uninterrupted delivery of service. |  |  |  |  |  |
| **2.** | **Understanding the SARS brand and requirements** |  |  |  |  |  |
| 2.1 | Submit a presentation (not word/excel) of not more than 10 slides (including introduction and conclusion) demonstrating an understanding of the political landscape and socio-economic conditions that would influence taxpayers’ perception of SARS and consequential reputational impact of the South African Revenue Service. What should the overall SARS marketing communication strategy include to effectively demonstrate understanding of the taxpayer perceptions and behaviour? And what makes your agency uniquely qualified to meet the media requirements of SARS. |  |  |  |  |  |
| **3.** | **Knowledge, information and skills transfer** |  |  |  |  |  |
| 3.1 | Provide a skills transfer platform that can be presented to the SARS Communication team. The content should address topics that will assist the SARS Communication Division in understanding the media industry and environment. |  |  |  |  |  |
| **4** | **Testimonials** |  |  |  |  |  |
| 4.1 | Provide reference letters from at least three (3) contactable clients listed in 9.4.1.1.b above, to whom similar services have been provided to in the past five (5) years. The reference letters must include: company name, contact person name and designation, phone number, email address, duration of contract, a brief description of the services rendered, accessibility and availability, the discount percentage received over the contract period as well as the level of satisfaction with the service rendered.  The identified reference should complete Annexure B and authenticate it with a company stamp or transfer the information onto their companies’ letterhead. |  |  |  |  |  |
| **5** | **Presentation** |  |  |  |  |  |
| 5.1 | Bidders will be required to present a media placement strategy to SARS for a major campaign. SARS will measure media placement insights (research), strategic thinking regarding placement strategy, bidders understanding of a variety of media platforms and media placement measurement proposals. Bidders must refer Annexure C: SARS case study. |  |  |  |  |  |