**aNNEXURE C: 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.** | **Company Profile and Resources** |  |  |  |  |  |
| 1.1 | The Bidders should provide in their response to SARS, detailing the following:   * An indication of years of experience actively involved in the medical aid brokerage industry; |  |  |  |  |  |
| **2.** | **Capability** |  |  |  |  |  |
| **2.1** | **Bidder Clients** |  |  |  |  |  |
| 2.1.1 | 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:  • Company Name;  • Contact Person;  • Size of the company;  • Phone numbers;  • Business address;  • Duration of the contract; and  • Brief description of the services provided.  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. |  |  |  |  |  |
| **2.2** | **Resources Allocated to the SARS Account** |  |  |  |  |  |
| 2.2.2 | 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:  • Valid proof of FAIS registration; and  • Valid proof of Council for Medical Schemes (CMS) accreditation; and  • Years of medical aid brokerage experience.  SARS may verify the validity of the above information with the respective accreditation bodies. |  |  |  |  |  |
| **3.** | **National Footprint** |  |  |  |  |  |
| 3.1 | 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.  For proof of physical presence, the Bidder should submit one of the following documentation:  • Proof of address or ;  • Lease agreement or ;  • Water bill or ;  • Electricity bill.  For proof of virtual communication tools, the Bidder must submit one the following documentation:  • Subscription or  • Licenses or ;  • Agreement. |  |  |  |  |  |
| **4** | **Customer Relationship Support Systems** |  |  |  |  |  |
|  | The Bidder must provide a short description for each of the following: |  |  |  |  |  |
| 4.1 | Existing customer relationship management (CRM) system; |  |  |  |  |  |
| 4.2 | Web functionality; |  |  |  |  |  |
| 4.3 | Self-service functionality; |  |  |  |  |  |
| 4.4 | Virtual communication; |  |  |  |  |  |
| 4.5 | Contact centre facility; and |  |  |  |  |  |
| 4.6 | Bulk SMS functionality. |  |  |  |  |  |
| **5** | **Year End Revision Services** |  |  |  |  |  |
| 5.1 | 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:  • 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. |  |  |  |  |  |
| **6** | **Wellness Days** |  |  |  |  |  |
| 6.1 | 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:  • 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. |  |  |  |  |  |