

TECHNICAL EVALUATION CRITERION – RFP 13 of 2019							
#	EVALUATION AREA	RFP REFERENCE		POINTS ALLOCATED	WEIGHT	MEASUREMENT	SCORES
1.	METHODOLOGY AND SAMPLES FRAME	Descriptors	SECTION 9.3.1. OF THE RFP	8			
1.1	Use of various methods and technologies to gather information	Bidder must fully demonstrate, with 3 examples, the methods and technologies to be used for the gathering of information/data for both the qualitative and quantitative approaches (Individual taxpayers; and power of authority).			2	Bidder failed to demonstrate the ability to employ methods and technologies for gathering information/data for both quantitative and qualitative studies with examples.	0
						Bidder partially demonstrated the ability to employ methods and technologies for gathering information/data for both quantitative or qualitative studies with less than 3 examples.	1
						Bidder demonstrated the ability to employ methods and technologies for gathering information/data for both quantitative and qualitative studies with all examples.	2
1.2	Relevant of methods used to gather information against other research methods	Bidder to fully justify the choice of methods for each of the approaches (Individual taxpayers and power of authority) with examples.			2	Bidder failed to justify use of the choice of methods for each sub-category (individual taxpayers and power of authority) with examples	0
						Bidder justified use of the choice of methods only for one sub-category (individual taxpayers or power of authority) with examples.	1
						Bidder justified use of the choice of methods for each sub-category (individual taxpayers and power of authority) with examples.	2
1.3	Demonstrate ability to design a nationally representative sample frame for the survey	Bidder to demonstrate a full representation of all demographics in the sampling frame (Individual taxpayers and power of authority) in 9 provinces with full description of the location type (e.g. race, gender, rural, urban etc.)			4	Bidder failed to demonstrate the ability to develop full representation of all categories in the sampling frame (Individual taxpayers and power of authority) in 9 provinces with full description of the location type (e.g. rural; urban etc.)	0
						Bidder fully demonstrated the ability to develop a full representation of all categories in the sampling frame (Individual taxpayers and power of authority) in 9 provinces with full description of the location type (e.g. rural; urban etc.)	4
TOTAL					8		
2.	ANALYSIS	SECTION 9.3.2 OF THE RFP		20			
2.1	Data analysis techniques	Bidder to demonstrate, step by step, the data analytic approaches for both quantitative and qualitative phases (Individual taxpayers; power of authority) (e.g. Descriptive analysis, correlation analysis, thematic analysis, factor analysis etc.). This shall also include processing data to collected in the field, data mining technology, data processing, data cleansing, etc			10	Bidder failed to demonstrate a clear representation of quantitative and qualitative analytic approaches for all categories for processing data.	0
						Bidder demonstrated a clear representation of quantitative and qualitative analytic approaches for only one category for processing data.	3
						Bidder demonstrated a clear representation of quantitative and qualitative analytic approaches for all categories for processing data.	10
2.2	Relevant Data analytic technique for the SARS Public Opinion Survey	Bidder to chose and justify the data analytic approach revelent for the SARS Public Opinion Survey e.g. Descriptive analysis, correlation analysis, thematic analysis, factor analysis etc.)			10	Bidder failed to demonstrate uses of secondary value-adding analysis techniques	0
						Bidder demonstrated one secondary value-adding value analysis technique	3
						Bidder demonstrated two secondary value-adding analysis techniques	5
						Bidder demonstrated more than two secondary value-adding analysis techniques	10
TOTAL					20		
3.	DEMONSTRATE THE ABILITY TO DELIVER ON THE PRIMARY OBJECTIVES		SECTION 9.3.3 OF THE RFP	15			
3.1	Understand the drivers of tax compliance from the public perspective	Bidder to demonstrate the understanding of the drivers/factors that explain tax compliance.			4	Bidder failed to demonstrate understanding of drivers of tax compliance.	0
						Bidder partially demonstrated understanding drivers of tax compliance.	1
						Bidder demonstrated an understanding of the as the factors that drive tax compliance	2
						Bidder demonstrated good understanding of the factors that drive tax compliance	4
3.2	Establish the public opinion index (Attitude to tax Compliance Index) on the public's attitudes, motivations and behaviour towards tax and trader compliance	Bidder to demonstrate expert knowledge and the step by step process of constructing a public opinion index			5	Bidder failed to demonstrate how to construct Attitude to Compliance Index (Public opinion index).	0
						Bidder demonstrated partial understanding on how to construct Attitude to Compliance Index (Public opinion index).	2
						Bidder demonstrated practical step by step understanding on how to construct Attitude to Compliance Index (Public opinion index).	5
3.3	Determine the Impact of the power of authority in driving public opinion	Bidder to demonstrate ability to clarify how power of authority drives public opinion on tax compliance.			4	Bidder failed to provide a clear and practical methodology to demonstrate how power of authority influence tax compliance.	0
						Bidder partially provided a clear and practical methodology to demonstrate how power of authority has on tax compliance	2
						Bidder demonstrated and provided a clear and practical methodology to demonstrate how power of authority has on tax compliance	4
3.4	Systematically demonstrate how to collect national data on an on-going (annual) basis on the role of public opinion in driving tax compliance	Bidder to demonstrate the ability to systematically collect national data on an on-going basis on the role of public opinion on tax compliance			2	Bidder failed to demonstrate the ability to systematically collect national data on an on-going basis on the role of public opinion on tax compliance.	0
						Bidder demonstrated the ability to systematically collect national data on an on-going basis on the role of public opinion on tax compliance.	2
TOTAL					15		

4.	RESOURCES AND PROJECT MANAGEMENT		SECTION 9.3.4 OF THE RFP	15			
4.1	Research and Analytics Resources	Bidder to demonstrate that Project Manager should have between 6 to 8 years of project management experience			2	Bidder failed to show the Project Manager has between 6-8 years of project management experience	0
						Bidder demonstrated that project Manager has between 6-8 years of project management experience.	2
4.2	Key Personnel in the Project Team*	Bidder to provide and show that the team (key personnel) to be assigned to the project has the right qualifications and experience in research and analysis with cumulative experience of between 10 to 15 years.			4	Bidder failed to provide and show that the team (key personnel) to be assigned to the project has the right qualifications and experience in research and analysis with cumulative experience of between 10 to 15 years	0
						Bidder provided and showed that the team (key personnel) to be assigned to the project has the right qualifications and experience in research and analysis with cumulative experience of between 10 to 15 years.	4
* The resume of the proposed Key Personnel should be expansive and demonstrate their previous experience in delivering research and analytics services.							
4.3	Project team / resources in relation to required implementation plan and high level project plan	Bidder to show that they have a team with requisite project resources required for successful project implementation (field work, data analytic software, data collection , capturing and mining, presentation and report writing).			2	Bidder failed to show that they have a team with requisite project resources required for successful project implementation.	0
						Bidder demonstrated that they have a team with requisite project resources required for successful project implementation.	2
4.4	Reporting mechanism put in place and frequency (Meetings and specified contact people)	Bidder to show the reporting mechanism that will be put in place and frequency of meetings or reporting.			2	Bidder failed to show the reporting mechanism to be put in place and frequency which must indicate: 1. Frequency of meeting; 2. Recording of minutes ; 3. Turnaround for delivery of minutes to SARS; 4. Contact person; 5. Dispute resolution of disputes; 6. Turnaround times for resolution of disputes.	0
						Bidder showed the reporting mechanism to be put in place and frequency which must indicate: 1. Frequency of meeting; 2. Recording of minutes ; 3. Turnaround for delivery of minutes to SARS; 4. Contact person; 5. Dispute resolution of disputes; 6. Turnaround times for resolution of disputes.	2
4.5	High level project plan	Bidder to demonstrate and provide high level for the 36 months (three year cycle) and detailed project plan for 12 months.			5	Bidder failed to demonstrate and provide high level for the 36 months (three year cycle) and detailed project plan for 12 months.	0
						Bidder demonstrated and provided high level for the 36 months (three year cycle) and detailed project plan for 12 months.	5
TOTAL					15		
5.	DATA MANAGEMENT AND REPORTING	SECTION 9.3.5 OF THE RFP		4			
5.1	Format of reports	Bidder to indicates total adherence to research process reporting format (executive summary, introduction, literature review, data collection, analysis, and recommendations)			1	Bidder did not demonstrate adherence to formats of report	0
						Bidder demonstrated complete adherence to formats of report	1
5.2	Turn-around times on report requests	Bidder to show total commitment to project timelines and adhoc requests from SARS			1	Bidder did not demonstrate adherence to turnaround times on report request	0
						Bidder demonstrated adherence to turnaround times on report request	1
5.3	Availability of raw data to research usable format	Bidder to show ability to provide raw data in a compatible format to SARS with all explanatory notes, definitions of codes used			2	Bidder did not demonstrate ability to provide raw data in a compatible to SARS with explanatory notes, definitions of codes used	0
						Bidder partial demonstrated the ability to provide data in a compatible to SARS with explanatory notes, definitions of codes used	1
						Bidder fully demonstrated the ability to provide data in a compatible to SARS with explanatory notes, definitions of codes used	2
TOTAL					4		
6.	SKILLS TRANSFER	SECTION 9.3.5 OF THE RFP		3			
6.1	Knowledge and skill transfer plan	Bidder to provide a comprehensive plan on skill transfer			3	Bidder failed to provide a comprehensive plan on skill transfer to SARS designated team	0
						Bidder provided a comprehensive plan on skill transfer to SARS designated team	3
TOTAL					3		
7	CLIENT REFERENCES / TESTIMONIALS	SECTION 9.4 OF THE RFP		5	5		
7.1	Provide the names of three (3) current/recent contactable references where survey services similar to SARS requirements (government / public issues, not just commercial marketing research) have been delivered. The information provided include: - Customer - company name - contact person - address - phone number - contract value - duration of contract - brief description of the services provided.	Bidder to provide information current/recent contactable references where survey services similar to SARS requirements have been delivered which include the following information for each: Customer, Company name, contact person, address, phone number, contract value, duration of contract and brief description of the service provided. (All of these information must appear of the client reference letter /testimonial).			5	Bidder did not provide client reference letter/testimonial with all info requested.	0
						Bidder did not provide client reference letter/testimonial with all info requested.	1
						Bidder listed 3 names of current/recent contactable references	5

TOTAL	5		
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