

REQUEST FOR PROPOSAL

BID DESCRIPTION:

APPOINTMENT OF A SERVICE PROVIDER FOR MARKETING AND
ADVERTISING SERVICES FOR A PERIOD OF THREE (3) YEARS

BID NUMBER:

POLMED003/2023/MARKETING

DATE OF MANDATORY BRIEFING SESSION:

23 January 2023 (Meeting link will be sent to Service Providers)

CLOSING DATE:

31 January 2023 AT 12H00

Table of Contents

1.GENERAL TERMS AND CONDITIONS OF THE BID.....	7
1.1. FRAUD AND CORRUPTION.....	7
1.2. BRIEFING SESSION.....	7
1.3. CLARIFICATIONS AND QUERIES.....	7
1.4. SUBMISSION OF RESPONSES.....	7
1.5. LATE SUBMISSIONS.....	8
1.6. FORMAT OF PART 1 - ADMINISTRATIVE REQUIREMENTS.....	9
1.7. FORMAT OF PART 2 - THE TECHNICAL PROPOSAL.....	9
1.8. FORMAT OF PART 3 – FINANCIAL PROPOSAL AND B-BBEE.....	10
1.9. VALIDITY OF THE BID.....	10
1.10. DURATION OF APPOINTMENT.....	10
1.11. NEGOTIATING AND CONTRACTUAL OBLIGATIONS.....	10
1.12. BIDDER SELECTION.....	11
1.13. ACCESS TO INFORMATION.....	11
1.14. BIDDER ENQUIRIES.....	11
1.15. REASONS FOR REJECTION.....	11
1.16. CANCELLATION OF PROCUREMENT PROCESS.....	12
1.17. ADMINISTRATIVE REQUIREMENTS.....	12
1.18. COMPANY REGISTRATION AND SHAREHOLDING INFORMATION.....	12
1.19. VALID, ORIGINAL TAX CLEARANCE CERTIFICATE.....	12
1.20. B-BBEE STATUS LEVEL.....	13
1.21. DECLARATION OF INTEREST.....	13
1.22. DECLARATION OF BIDDER’S PAST SCM PRACTICES.....	14
1.23. INVESTIGATIONS BY REGULATORY BODIES.....	14
1.24. SIGNATORY BY DULY AUTHORISED REPRESENTATIVE.....	14
1.25. FINANCIAL SOUNDNESS.....	14
1.26. EVALUATION PROCESS.....	15
GATE 1 – ADMINISTRATIVE DOCUMENTS AND COMPLIANCE.....	15
2.ADMINISTRATIVE COMPLIANCE.....	15
STANDARD BID DOCUMENTS.....	17
TERMS OF REFERENCE – MARKETING AND ADVERTISING SERVICES.....	25
1.PURPOSE OF THE REQUEST FOR PROPOSALS.....	25
2.BACKGROUND ON POLMED.....	25
3.PROPOSAL SPECIFICATION.....	25
4.SPECIFIC REQUIREMENTS.....	29

5.RETAINER RESOURCES 29
6.REQUIRED ATTRIBUTES AND BIDDER REQUIREMENTS..... 30
GATE 2- TECHNICAL EVALUATION..... 31
GATE 3 - PRICING AND B-BBEE EVALUATION..... 33
7. POINTS FOR PRICE 33
8. PRICING SCHEDULE 35
9.B-BBEE STATUS.....366

GLOSSARY

Abbreviation	Description
Administrator	The Administrator of the Scheme, duly appointed by the Scheme from time to time.
Authorised representative	Person/ legal entity authorised by the Board of Trustees or by its delegate, the POLMED Officer of POLMED, to represent POLMED from time to time.
Award	Conclusion of the procurement process and final notification to this effect to the successful Bidder.
B-BBEE	Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003) and the Codes of Good Practice issued there under by the Department of Trade and Industry.
Bid	A written offer on the official bid documents and in a prescribed or stipulated form in response to an invitation by POLMED for the provision of services, works or goods.
Bidder	Entity/joint venture/consortium responding to the Request for Bid.
Board of Trustees	The duly elected and appointed Board of Trustees of POLMED.
CMS/ Council	The Council for Medical Schemes established in terms of section 3 of the Medical Schemes Act.
CoGP	Codes of Good Practice.
Contracting Entity/ Contractor	Contracting entity with whom POLMED will conclude a formal contract and service level agreement subsequent to the final award of the contract based on this Request for Bid.
DTI	Department of Trade and Industry of the Government

Abbreviation	Description
EME	Exempted Micro Enterprise in terms of the Codes of Good Practice.
IP	Intellectual Property.
Medical Schemes Act	The Medical Schemes Act, Act No 131 of 1998, and any regulations published in terms thereof.
Member	Any person who is enrolled as a Member of the Scheme and who is a member in terms of the Rules and shall be deemed to include the registered dependents of a Member.
Original bid	Original document signed in ink by the person duly authorised to commit the Bidder. Copies of original document signed in ink by the person duly authorised to commit the Bidder.
PO	Principal Officer.
POLMED	The South African Police Service Medical Scheme being a medical scheme registered under the Medical Schemes Act, 1998 (referred to as the Scheme).
QSE	Qualifying smart enterprise in terms of the codes of good practice.
RFP	Request for Proposals.
Rules	The registered Rules of the Scheme as defined in terms of the Medical Schemes Act.
SCM	Supply Chain Management.
ToR	Terms of Reference.
Trustees	The members of the Board of Trustees of the Scheme, as constituted in terms of the Rules to manage the Scheme.
Valid document	A document containing authentic information conforming to legally binding status and is enforceable

Abbreviation	Description
	by the executing authority on the bidding authority whether in an original, copied, reproduced, photo, faxed or in electronic format and that has bearing to transaction(s) with POLMED. Such submission must be valid at the closing date and time of submission.
Will be deemed non-responsive	Bidder will immediately be excluded from further evaluation non-responsive.

1. GENERAL TERMS AND CONDITIONS OF THE BID

1.1. FRAUD AND CORRUPTION

All Bidders should take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

1.2. BRIEFING SESSION

A compulsory briefing session will be held for this bid on 20 January 2023. Service Providers must register to obtain a meeting link through procurement@polmed.co.za

The details of the briefing session dates will be sent to all potential Service Providers.

1.3. CLARIFICATIONS AND QUERIES

Telephonic requests for clarification will not be accepted. Any clarification required by a bidder regarding the meaning or interpretation of any part of the Terms of Reference or any other aspect concerning the RFP, must be requested in writing (e-mail) from procurement@polmed.co.za . The RFP number must be mentioned in all correspondence.

1.4. SUBMISSION OF RESPONSES

Responses to the RFP document must be submitted in the following manner:

1.4.1. Hard Copies Submissions

The tender box is situated at the reception of the POLMED head office:

Crestway Office Park
Block A, 20 Hotel Street
Persequor Park
Lynnwood
Pretoria

For purposes of this RFP, bids submitted via facsimile will not be considered.

The three (3) envelope system will be followed. One (1) original and two (2) copies of the bid of the administrative documents, technical proposal and financial bid must be submitted in a sealed envelope/ pack.

All bids must be submitted together with an **electronic copy (Memory Stick/USB)** of the entire bid in the format prescribed in section 1.4.2 the bid document.

Failure to submit an electronic copy of the bid will lead to the bid being non-responsive and will be disqualified.

Bids should be submitted in a sealed envelope/ pack, marked with:

- RFP number: POLMED003/2022/MARKETING
- Closing date and time: 31 January 2023 at 12h00 p.m.
- The name and address of the bidder.
- Indication if the envelope/ pack relates to the technical or financial response.

1.4.2. Electronic Bid Submissions through POLMED Procurement E-mail

Electronic bids must be submitted by closing date and time to procurement@polmed.co.za in the following manner, **failure to comply to the submission format will invalidate the bid:**

- Part 1 – Administrative Documents
- Part 2 – Technical Proposal
- Part 3 – Pricing and B-BBEE Information

The reference number of the bid must be clearly indicated in the subject line.

All bids submitted to POLMED will become the property of POLMED and will as such shall not be returned to the bidder. POLMED will maintain all reasonable efforts to maintain bids in confidence. Proprietary information should be indicated as such in each bid.

1.5. LATE SUBMISSIONS

Bids received late will not be considered. A bid will be considered late if it arrived even one (1) second after 12:00PM or any time thereafter. The tender box shall be locked at exactly 12:00PM and bids arriving late will not be considered under any circumstances.

The official Telkom time (Dial 1026) will be used to verify the exact closing time.

Bids received late shall be returned unopened, where possible, to the bidder. Bidders are therefore strongly advised to ensure that bids be

dispatched allowing enough time for any unforeseen events that may delay the delivery of the bid.

1.6. FORMAT OF PART 1 - ADMINISTRATIVE REQUIREMENTS

Bids submitted by potential service providers must include at least the following mandatory documentation/ information:

- A: Standard Bid Document, Declaration of interest and Declaration of bidder's past SCM practices.
- B: Company registration and shareholding information to support the B-BBEE contribution certificate.
- C: Valid, original tax clearance certificate or equivalent.
- D: B-BBEE status level of contribution certification or sworn affidavit.
- E: Audited or independently reviewed annual financial statements covering a period of three (3) financial years. POLMED reserves the right to request the independent reviewer's report post submission of proposals for independently reviewed financial statements.
- F: Investigation by regulatory bodies (Refer to Section 1.23 of the bid of the bid and submit the required letter).
- G: Signature by a duly authorized representative of the bidder and all pages of the bid initialled for correctness

Failure to provide any of the above administrative compliance documents **will lead** to the bid being non-responsive.

1.7. FORMAT OF PART 2 - THE TECHNICAL PROPOSAL

Submissions by Bidders must be in the following format:

- A: Executive Summary.
- B: Company Profile, Capacity and Geographical Footprint
- C: Company Competency and Expertise
- D: Experience in Providing the Service
- E: Methodology and Approach
- F: Team Competency and Experience, including CVs and Qualifications
- G: Client References (Contactable)
- H: Account Management
- I: Reporting

1.8. FORMAT OF PART 3 – FINANCIAL PROPOSAL AND B-BBEE

Submissions by Bidders must be in the following format:

- Pricing Schedule
- B-BBEE Sworn Affidavit or valid B-BBEE Certificate rated by a SANAS Accredited agency.

1.9. VALIDITY OF THE BID

The functional and financial bids must be valid for a period of 90 days from the closing date of this RFP.

1.10. DURATION OF APPOINTMENT

The term of the contract will be for a period of three (3) years renewed annually based on performance. POLMED reserves the right to terminate the contract of the service provider on the basis of poor performance, giving the service provider sufficient prior notice thereof in writing.

1.11. NEGOTIATING AND CONTRACTUAL OBLIGATIONS

A bid will constitute a binding offer, but such offer will be deemed not to have been accepted, unless and until a definitive contractual agreement and other related documents are concluded between POLMED and the preferred bidder.

POLMED or its authorised representatives have the right to enter into negotiation with one (1) or more bidders regarding any terms and conditions, including price(s), of a proposed contract.

POLMED shall not be obliged to accept the lowest bid price.

POLMED reserves the right to select another Preferred Bidder in the event that negotiations with the originally selected Preferred Bidder prove to be unsuccessful and/or unduly delayed.

Upon final selection and notification of the Preferred Bidder, a process of final negotiations will commence. Negotiations will be used to finalise outstanding elements of the SLA in an effort to arrive at a comprehensive binding SLA that will govern the relationship between POLMED and the Successful Bidder.

Under no circumstances will negotiation with any Bidders, including with preferred Bidders, constitute an award or promise/ undertaking to award the contract or be construed as legitimate expectations by such Bidder.

1.12. BIDDER SELECTION

POLMED reserves the right to select the appropriate service provider based on its requirements.

1.13. ACCESS TO INFORMATION

All Bidders will be informed of the status of their bid once the procurement process has been completed. Requests for information regarding the RFP process will be dealt with in line with the POLMED SCM Policy and other relevant applicable legislation in terms of access to information.

1.14. BIDDER ENQUIRIES

All technical and Supply Chain-related enquiries must be sent in writing to procurement@polmed.co.za. The RFP number must be mentioned in all correspondence.

1.15. REASONS FOR REJECTION

POLMED shall reject a bid for the award of a contract if the recommended Bidder is suspected of fraud or improper conduct or has committed a proven corrupt or fraudulent act in competing for the particular contract.

POLMED may disregard the bid of any Bidder if that Bidder, or any of its directors due to the following :

- Have abused the Supply Chain Management (SCM) system of POLMED through combative procurement practices as per its SCM Policy.
- Are suspected of or have committed proven fraud or any other improper conduct in relation to such system.
- Have failed to perform on any previous contract.
- In case of collusive tendering by the Bidders or any anti-competitive conduct as determined in terms of the Competition Act, 89 of 1998.
- In case a Bidder, a member of the Bidder, has interest (directly or indirectly) in any other Bidder.

1.16. CANCELLATION OF PROCUREMENT PROCESS

POLMED reserves the right to amend, modify or withdraw this RFP or amend, modify or terminate any of the procedures or requirements set out herein at any time and from time to time, without prior notice and without liability to compensate or reimburse any person.

1.17. ADMINISTRATIVE REQUIREMENTS

Bids submitted by potential service providers must include at least the following mandatory documentation/ information:

- Company registration and shareholding information to support the B-BBEE contribution certificate.
- Valid, original tax clearance certificate or equivalent.
- B-BBEE status level of contribution certification or sworn affidavit.
- Audited or independently reviewed annual financial statements covering a period of three (3) financial years. POLMED reserves the right to request the independent reviewer's report post submission of proposals for independently reviewed financial statements.
- Declaration of interest.
- Declaration of bidder's past SCM practices.
- Investigation by regulatory bodies and submit the required letter as per Section 1.23 of the bid.
- Proof of minimum 3 years consecutive experience in the relevant field.
- Signature by a duly authorized representative of the bidder and all pages of the bid documents initialled for correctness.

1.18. COMPANY REGISTRATION AND SHAREHOLDING INFORMATION

The Bidder must be a South African entity and must submit its company registration details and documentation. Bids submitted without a company registration document will be deemed to be non-responsive.

1.19. VALID, ORIGINAL TAX CLEARANCE CERTIFICATE

A valid SARS Tax Clearance Certificate must accompany the bid and must be valid at the date of closing of the RFQ. In case of a consortium/ joint venture, a valid SARS Tax Clearance Certificate for each consortium/ joint venture member must be submitted.

The following options will be regarded as a valid tax clearance certificate:

- A valid original tax clearance pin certificate printed directly by SARS; or
- A valid tax clearance certificate mailed to the relevant party to the bid and thus printed by the party to the bid and which is accompanied by a PIN through which POLMED may confirm the validity of the certificate on the closing date of the bid. Failing to provide a PIN will lead to the verification being done at a later stage which would require that the party to the bid's tax compliance status be measured after the closing date and must be in order on date of measurement.
- Where no valid tax clearance exists for any party noted above, a letter from SARS needs to be provided for that party, indicating that satisfactory arrangements have been made with SARS to meet the party's tax obligations.

Bids submitted without a valid original tax clearance certificate or proof of arrangements made with SARS for each party to the bid will be deemed to be non-responsive.

1.20. B-BBEE STATUS LEVEL

The proof pertaining to the bidder's level contributor status or sworn affidavit should be provided. Information is available at www.dti.gov.za.

Failure to provide the B-BBEE Certification **will lead** to the bid being regarded as **non-responsive**.

1.21. DECLARATION OF INTEREST

The bidder must complete and return the "Declaration of Interest" on behalf of all parties to the bid.

The bidder must fully declare all co-administration or sub-contracting arrangements/ agreements/ financial interest between the organisation and other entities, including POLMED and its service providers.

Irrespective of the "Declaration of Interest" form, the bidder must submit a full declaration of relationships between the bidder and other service providers in the healthcare industry (including POLMED). If no such relationships exist, the bidder must indicate this in their submission in terms of this requirement.

Bids submitted without a completed and signed Declaration of Interest **will be deemed to be non-responsive**.

1.22. DECLARATION OF BIDDER'S PAST SCM PRACTICES

The bidder must complete and return the "Declaration of bidder's past Supply Chain Management practices" on behalf of all parties to the bid.

Bids submitted without a completed and signed "Declaration of bidder's past Supply Chain Management practices" form may be deemed to be non-responsive.

1.23. INVESTIGATIONS BY REGULATORY BODIES

The bidder is to confirm through a signed confirmation letter that it is not being investigated by any regulatory bodies irrespective of the nature of the investigation. If it is being investigated, the respective details are to be supplied as part of this submission.

1.24. SIGNATORY BY DULY AUTHORISED REPRESENTATIVE







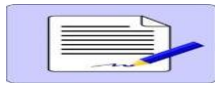
Bidders must provide proof that the individual signing the bid documents are duly authorised to sign the bid, i.e., a resolution of directors, etc. should be provided.

1.25. FINANCIAL SOUNDNESS

POLMED reserves the right to request for Independently reviewed annual financial statements if at the time of the closing date an independent review has not been conducted, the bidder would be required to submit independently reviewed financial statements within a prescribed time determined by POLMED. Failure to submit independently reviewed financial statements will lead to a non-responsive bid.

1.26. EVALUATION PROCESS

Evaluation of the responses from the Bidders will be done in a phased approach as per the below criteria:

Stage 1	Stage 2	Stage 3	Award
<p>ADMINISTRATIVE COMPLIANCE</p>  <p>RETURNABLE DOCUMENTS</p> 	<p>TECHNICAL EVALUATION</p>  <p>80% MINIMUM THRESHOLD</p> 	<p>PRICE & B-BBEE EVALUATION</p> <div style="border: 1px solid blue; border-radius: 10px; padding: 5px; width: fit-content; margin: 10px auto;"> <p>Price = 80 B-BBEE = 20</p> </div> <p>WEIGHTED SCORING / 100</p> 	<p>FINAL AWARD</p> <p>Post tender negotiation (if applicable) requesting best & final offer.</p>  <p>Negotiation of final terms & conditions of contract.</p> 

GATE 1 – ADMINISTRATIVE DOCUMENTS AND COMPLIANCE

2. ADMINISTRATIVE COMPLIANCE

Refer to the checklist for a summary of the compulsory documentation and information. All bid documents must be completed and signed by the duly authorised representative of the Bidder. All pages of the bid documents must be initialled by an authorised director of the company. During this phase Bidders' responses will be evaluated based on compliance with the listed administration and mandatory bid requirements. The Bidder's bid will be disqualified for non-submission of any of the documents.

2.1. CHECKLIST FOR GATE 1 – ADMINISTRATIVE DOCUMENTS

No	Required Documents	Mark (Y) if submitted and (N) if not submitted	Cross Reference to Bid where documents can be found
A	Standard Bid Document, Declaration of interest and Declaration of bidder's past SCM practices.		
B	Company registration and shareholding information to support the B-BBEE contribution certificate.		
C	Valid, original tax clearance certificate or equivalent.		
D	B-BBEE status level of contribution certification or sworn affidavit.		
E	Three (3) years independently reviewed annual financial statements. Bidders are to submit an Independent Reviewer's report for unreviewed financial statements in accordance with sec 1.25 of the bid.		
F	Investigation by regulatory bodies (Refer to Section 1.23 of the bid). Signed confirmation letter by the Bidder must be submitted.		
G	Signature by a duly authorized representative of the bidder and all pages of the bid initialled for correctness		

Failure to provide any of the above administrative compliance documents **will lead** to the bid being non-responsive.

STANDARD BID DOCUMENTS

i) INVITATION TO BID

YOU ARE HEREBY INVITED TO RESPOND TO A BID OF POLMED					
BID NUMBER	POLMED003/2022/MARKETING	CLOSING DATE	31 January 2023	CLOSING TIME	12:00
DESCRIPTION	Request for Proposals for appointment of a Service Provider for Marketing and Advertising Services				
VALIDITY	90 Days				
The successful Bidder will be required to fill in and sign a written Formal Contract and SLA.					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT:					
Crestway Office Park Block A, 20 Hotel Street Persequor Park Lynnwood Pretoria					
No posted OR faxed Bids will be accepted Bidders should ensure that bids are delivered before the closing date and time to the correct physical address. Submission of late bids will not be accepted. Bids can be delivered and deposited into the tender box between 08:00 and 16:30, Mondays to Fridays prior to the closing date and between 08:00 and 11:00 on the closing date. All bids must be submitted on the official bid forms (not to be re-typed).					
TECHNICAL AND SUPPLY CHAIN ENQUIRIES MAY BE DIRECTED VIA EMAIL TO					
E-MAIL ADDRESS	procurement@polmed.co.za				

SUPPLIER INFORMATION			
NAME OF BIDDER			
POSTAL ADDRESS			
STREET ADDRESS			
TELEPHONE NUMBER	CODE		NUMBER
CELLPHONE NUMBER			
FACSIMILE NUMBER	CODE		NUMBER
E-MAIL ADDRESS			
COMPANY REGISTRATION NUMBER			
INCOME TAX REFERENCE NUMBER			
COMPANY PAYE NUMBER			
COMPANY UIF NUMBER			
VAT REGISTRATION NUMBER			
TAX CLEARANCE CERTIFICATE/ TAX COMPLIANCE SYSTEM PIN SUBMITTED	TICK APPLICABLE BOX <input type="checkbox"/> Yes <input type="checkbox"/> No <i>PROOF MUST BE SUBMITTED</i>		
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ B-BBEE STATUS LEVEL SWORN AFFIDAVIT	TICK APPLICABLE BOX <input type="checkbox"/> Yes <input type="checkbox"/> No <i>A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED</i>		

POLMED DOMICILLIUM	
POLMED chooses the following as its domicilium citandi et executandi for all purposes of and in connection with the final contract: Crestway Office Park, Block A, 20 Hotel Street, Persequor Park, Lynnwood, Pretoria	
DECLARATION	
I/ We have examined the information provided in your bid documents and offer to undertake the work prescribed in accordance with the requirements as set out in the bid document. The prices quoted in this bid are valid for the stipulated period. We confirm that this bid will remain binding upon us and may be accepted by you at any time before the expiry date.	
Signature of the bidder	
Position	
Date	
Duly authorised to commit the Bidder	TICK APPLICABLE BOX <input type="checkbox"/> Yes <input type="checkbox"/> No <i>PROOF MUST BE SUBMITTED</i>

ii) TAX COMPLIANCE REQUIREMENTS

It is a condition of this bid that the taxes of the successful Bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Services (SARS) to meet the Bidder's tax obligations.

Bidders are required to submit their Unique Personal Identification Number (PIN) issued by SARS to enable POLMED to view the Bidders profile and tax status.

Application for tax compliance status (TCS) or PIN may also be made via e-filing. In order to use this provision, tax payers will need to register with SARS e-filing through the website www.sars.co.za.

Bidders may also submit a printed Tax Clearance Certificate or Tax Clearance Status.

In bids where consortia/ joint ventures/ sub-contractors are involved, each party must submit a separate Tax Clearance Certificate or proof of Tax Clearance Status/ PIN.

iii) DECLARATION OF INTEREST

Any legal person, including persons employed by POLMED, or persons having a kinship with persons employed by POLMED, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by POLMED, or to persons connected with or related to them, it is required that the Bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority and/or take an oath declaring his/her interest, where:

- the Bidder is employed by POLMED; and/or
- the Bidder is a management Board of Trustees member; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

1. Are you or any person connected with the Bidder, employed by POLMED?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, provide particulars:		
2. Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by POLMED and who may be involved with the evaluation and or adjudication of this bid?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, provide particulars:		

3. Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by POLMED who may be involved with the evaluation and or adjudication of this bid?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, provide particulars:		
4. Do you or any of the directors/ trustees/ shareholders/ members of the company have any interest in any other related companies whether or not they are bidding for this contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, provide particulars:		

DECLARATION	
I, the undersigned (name).....,..... certify that the information furnished above is correct. I accept that POLMED may reject the bid or act against me should this declaration prove to be false.	
Name of Bidder	
Signature	
Position	
Date	

(iv) DECLARATION OF INTEREST

This declaration will be used by institutions to ensure that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.

The bid of any Bidder may be disregarded if that Bidder, or any of its directors have:

- a. abused POLMED's supply chain management system.

- b. committed fraud or any other improper conduct in relation to such system; or
- c. failed to perform on any previous contract.

In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

<p>1. Is the Bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector or listed on the CIPC as a Director prohibited from doing business?</p> <p>(Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the audi alteram partem rule was applied).</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
<p>If so, provide particulars:</p>		
<p>2. Is the Bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</p> <p>To access the Register, enter the National Treasury's website, www.treasury.gov.za click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number 012-3265445.</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
<p>If so, provide particulars:</p>		

3. Was the Bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five (5) years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, provide particulars:		
4. Was any contract between the Bidder and any organ of state or private entity terminated during the past five (5) years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, provide particulars:		

DECLARATION	
I, the undersigned (name)..... certify that the information furnished above is correct. I accept that POLMED may reject the bid or act against me should this declaration prove to be false.	
Name of Bidder	
Signature	
Position	
Date	

iv) SUB-CONTRACTING

Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES		NO	
-----	--	----	--

If yes, indicate:

- I. What percentage of the contract will be sub-contracted?
.....%
- II. The name of the sub-contractor(s)
.....
- III. The B-BBEE status level of the sub-contractor(s)
.....

The Service Provider may use subcontractors in connection with the work performed under this Agreement. When using subcontractors, however, if not listed in the proposal at the time of selection, the Service Provider must obtain prior written approval from POLMED. In using subcontractors, the Service Provider is responsible for all their acts and omissions to the same extent as if the subcontractor and its employees were employees of the Main Contractor. All requirements set forth as part of the bid will be applicable to all subcontractors and their employees to the same extent as if the Main Contractor and its employees had performed the services.

TERMS OF REFERENCE – MARKETING AND ADVERTISING SERVICES

1. PURPOSE OF THE REQUEST FOR PROPOSALS

1.1. POLMED wishes to invite a qualified suitable Service Provider for its marketing and advertising services including Public Relations.

2. BACKGROUND ON POLMED

2.1. The South African Police Service Medical Scheme (POLMED) was established to cater for the Medical Scheme needs of members of the South African Police Service (SAPS) appointed under the South African Police Act, Act No. 68 of 1995. The Scheme is a non-profit restricted medical scheme registered in terms of the Medical Schemes Act, Act No. 131 of 1998 and its Rules are registered with the Council for Medical Schemes in terms of the said Act.

2.2. The duties and responsibilities of the Board of Trustees are regulated by the Rules of the Scheme and the Medical Schemes Act, 131 of 1998, as amended. The Board of Trustees has several Board Committees that are designed to allow every Trustee to play a role in governance of the Scheme. These Committees have their own Chairpersons and meet on a frequent basis to deal with issues that are relevant to them and issues that have been delegated to them by the Board. Trustees have the responsibility of looking after the Scheme's funds on behalf of members.

3. PROPOSAL SPECIFICATION

3.1. POLMED requires reputable institutions with vast knowledge, and relevant experience in marketing and advertising services.

3.2. The service provider will be required to provide the following media production, Public Relations (PR) and marketing services, but not limited to:

3.3.1. Brand and marketing strategy

- 3.3.1.1. Gain in-depth knowledge and understanding of client's business: organisational structure, operations and operating environment, business strategy, and industry-related and regulatory issues.
- 3.3.1.2. Gain in-depth knowledge and understanding of client's brand and marketing strategy.
- 3.3.1.3. Gain in-depth knowledge and understanding of client's members/target markets/ stakeholders and extract relevant communication insights.
- 3.3.1.4. Competitor analysis (similar medical schemes and Health Maintenance Organisations) marketing activity: Maintain constant awareness and monitoring of client's core competitors and their market communication activities, and pro-actively inform client thereof.
- 3.3.1.5. Conduct competitor reviews (client brand vs competitor brand activity).
- 3.3.1.6. Pro-active strategic involvement in providing client with relevant industry and market insights and trends.
- 3.3.1.7. Attend and participate in client's marketing and brand strategy meetings.
- 3.3.1.8. Provide advice and input into client's marketing and brand strategy.
- 3.3.1.9. Conduct in-depth analysis of work executed against client's strategy and marketing plans to ascertain efficacy and impact.
- 3.3.1.10. Conduct campaign-related market research for application to campaign strategy and creative solutions and advise client of findings.
- 3.3.1.11. Provide advice and guidance on communication strategies.
- 3.3.1.12. Develop and review integrated communication strategies and plans.
- 3.3.1.13. Develop and review over and below the line channel strategies.
- 3.3.1.14. Provide strategic direction to agency's creative resources through creative briefs.
- 3.3.1.15. Monitor campaign performance and conduct campaign evaluations.
- 3.3.1.16. Management of campaign financials and reporting.
- 3.3.1.17. Creative Concept, Writing and Strategy Development.
- 3.3.1.18. Development/Review of the POLMED Communication Strategy and provide advise herein.
- 3.3.1.19. Development of tactical plans and messages in line with strategy and events objectives.
- 3.3.1.20. Design look and feel of collateral materials

3.3.2. Scheme strategy and Integrated Reporting

- 3.3.2.1. Proactive involvement in suggesting/building on Corporate Social Investment, and Corporate Social Responsibility initiatives that align to brand objectives and contribute to the achievement of Scheme Strategic goals.
- 3.3.2.2. Give creative concepts and briefs regarding POLMED's integrated report
- 3.3.2.3. Develop, copywrite and review POLMED's integrated report for each of the appointed financial years.
- 3.3.2.4. Printing of the integrated report.

3.3.3. Communication strategy

- 3.3.3.1. Develop corporate communication strategies, which also incorporate digital strategies
- 3.3.3.2. Drafting of corporate communication documents
- 3.3.3.3. Drafting of key communication (e.g. member, provider and documentation from the office of the Principal officer)
- 3.3.3.4. Respond to media queries and submit to the PO office for consideration
- 3.3.3.5. Reputation and crisis management.
- 3.3.3.6. Leveraging Corporate Social Investment (CSI) and Corporate Social Responsibility (CSR) objectives to communicate POLMED's values and objectives.

3.3.4. Social Media

- 3.3.4.1. Contextually relevant Social Media content planning and community management.
- 3.3.4.2. Social listening.
- 3.3.4.3. Social media analysis and reporting.
- 3.3.4.4. AR and interactive media development.
- 3.3.4.5. Social, Online and Digital Media Development and Management including (Paid social media).
- 3.3.4.6. Management of social media queries.
- 3.3.4.7. Channel strategy and management.
- 3.3.4.8. Content strategy and creation.
- 3.3.4.9. social calendar.

3.3.5. Public Relations Management

- 3.3.5.1. Fully integrated PR marketing development, planning, execution and monitoring (incl. optimisation and reporting) of the annual marketing plan which includes i.e. digital, offline and social media PR expertise.
- 3.3.5.2. Create, implement and track campaign messaging and tweak where applicable for the various market segments (based on market insights). Ensure consistent messaging for integrated consumer and internal campaigns across the relevant channel mix.
- 3.3.5.3. Proactive idea generation to enrich the overall marketing plan with breakthrough projects/campaigns to address the defined targets.
- 3.3.5.4. Create and implement an integrated PR strategy for traditional, social and digital in line with an annual marketing plan.
- 3.3.5.5. Handle management of projects incl. communication and consultancy, workflow management, weekly updates, and project management reporting as per requirements.
- 3.3.5.6. Media monitoring and reporting.
- 3.3.5.7. Media booking where POLMED needs to inform the public and its members about any information.
- 3.3.5.8. Consumer and Trade Media: Identify, execute and monitor media activation such as media networking events, round tables, etc. - as per agreed integrated marketing & PR plan or on an-ad hoc project with a specific purpose and deliverable(s).
- 3.3.5.9. Develop, implement and monitor a media/ brand crisis management strategy and plan.
- 3.3.5.10. Create corporate statements

3.3.6. Multimedia

- 3.3.6.1. Multimedia Production (including but not limited to, radio, video, photographic services and graphic services).
- 3.3.6.2. Provide Audio-Visual services such as videos, online videos, videography, script writing, pre-production, production and postproduction.
- 3.3.6.3. Development of Podcasts.
- 3.3.6.4. Development of Vodcasts.
- 3.3.6.5. Development of material required for press, television, radio, online, social media and mobile executions to the latest technology standards when required.

- 3.3.6.6. Art direction on projects.
- 3.3.6.7. Scriptwriting and development for various POLMED requests.

3.3.7. POLMED Events Management

- 3.3.7.1. Provide an effective account administration, cost control and reporting activities for POLMED campaigns and events.
- 3.3.7.2. Campaign and Event Management including but not limited to:
 - Submission of marketing material to media houses within the agreed timelines.
 - Management of campaign financials and reporting.
 - Attending weekly status meetings and recording them.

3.3.8. Administration

- 3.3.8.1. Provide an effective account administration, cost control and reporting activities.
- 3.3.8.2. Effectively report on all activities.

4. SPECIFIC REQUIREMENTS

- 4.3.1. Prospective Service Providers must be able to provide fully integrated marketing and communication services as per services indicated above.
- 4.3.2. Where the integrated services as per paragraph are outside the strengths of the bidder, detailed information of how the services will be provided to meet the requirements of POLMED and its clients must be provided.
- 4.3.3. The service provider must submit three (3) samples of three (3) different and successful integrated marketing communications strategies that includes the following:
 - Social, Online and Digital Media strategy Development and Management (including paid media)
 - Below and above the line campaigns
 - Public Relations and Reputation Management
 - Multimedia Production Services (including but not limited to radio production, video production, photographic services, and graphic design).

5. RETAINER RESOURCES

- 5.1. The following key personnel must be assigned to POLMED (including their number of years' experience):

- Strategy Director with a minimum of 10 years of proven experience in marketing.
 - Creative Director with a minimum of 10 years of proven experience in marketing and communication
 - Account director with a minimum of 10 years of proven experience in marketing, communication, and advertising.
 - Copy Writer with a minimum of 5 years of proven experience in copy writing
 - Art director or Graphic Designer with a minimum of 5 years of proven experience in graphic design.
 - Researcher with a minimum of 5 years of proven experience in market research.
 - Any other relevant key personnel required to execute, please provide CVs.
- 5.2. The above-mentioned resources are required to perform the tasks as outlined in the scope above as part of the retainer fees. POLMED maintains the right to use the resources for projects outside of the scope of the retainer at the agreed hourly rates.

6. REQUIRED ATTRIBUTES AND BIDDER REQUIREMENTS

- 6.1. The following attributes, among others, will be considered by POLMED:
- a) Knowledge and experience in marketing and advertising services.
 - b) Conformance to exceptional quality and standard of work, and meticulous attention to detail; and fast turnaround time.
 - c) Proven track record in the provision of required services (A minimum of five reference letters to be submitted).
 - d) Necessary acumen and logistics to provide services.
 - e) Company profile.

GATE 2 - TECHNICAL EVALUATION

7. EVALUATION PROCESS

7.1. Bids will be evaluated on functionally as per the evaluation criteria and weights in the table shown below.

No	Criteria	Weight Allocated	CROSS REFERENCE TO BID DOCUMENT
1	EXPERIENCE IN PROVIDING THE SERVICE		
1.1	Bidder must provide a comprehensive company profile detailing: <ul style="list-style-type: none"> • Company’s years of experience in providing marketing and communication and PR services, a minimum of five consecutive years is required. • Systems and Access to Equipment to be able to render required services to all POLMED stakeholders. • Staff structure and business continuity plans in place to complete the assignment • Industry/Individual recognised Achievements and Awards 	30	
2	CAPACITY AND CAPABILITY TO DELIVER TO POLMED		
2.1	The service provider must submit three (3) samples of three (3) different and successful integrated marketing communications strategies that includes the following: <ul style="list-style-type: none"> - Social, Online and Digital Media strategy Development and Management (including paid media) 	20	

No	Criteria	Weight Allocated	CROSS REFERENCE TO BID DOCUMENT
	<ul style="list-style-type: none"> - Below and above the line campaigns - Public Relations and Reputation Management - Multimedia Production Services (including but not limited to radio production, video production, photographic services, and graphic design) 		
2.2	<p>Bidder must provide the following retainer resources for POLMED account.</p> <p>The bidder must provide a one (1) page Curriculum Vitae (CV) indicating relevant qualifications to required services. Level of expertise (Designation/Title) of each resource recommended</p> <ul style="list-style-type: none"> • Years of experience in the required industry sectors. 	15	
2.3	<ul style="list-style-type: none"> • Inclusion of innovative creative solutions that will have a positive impact on POLMED Members 	5	
3 REPORTING			
3.1	<p>Illustrated insightful and comprehensive reporting capabilities through examples for brand management, integrated reporting, campaign management and social media management.</p>	5	
4. ACCOUNT MANAGEMENT			
4.1	<p>Detail the customer service and provide an outline of account management touchpoints and procedures relating to the POLMED account.</p>	5	

No	Criteria	Weight Allocated	CROSS REFERENCE TO BID DOCUMENT
5.	CLIENT REFERENCES		
5.1	Bidders are required to submit 5 unique testimonials (not older than 5 years). Each testimonial must include but not be limited to: <ul style="list-style-type: none"> • Client name. • Contact person, phone number, email address, company business address. • A brief description of the full services rendered • Quality and satisfaction of service. 	15	
6.	Registration with a Marketing Association Body	5	
7.	TOTAL	100	

Service Providers will be required to meet a minimum of threshold of **80% on technical evaluation** to proceed to Gate 3, i.e., Price and B-BBEE Evaluation.

GATE 3 - PRICING AND B-BBEE EVALUATION

8. POINTS FOR PRICE

8.1.1. Bidders are required to include in their responses, fee proposals in respect of the amount and nature of their expected remuneration for the services to be provided by them. In this regard, Bidders are to indicate specific billing arrangements, hourly rates per professional level, details of any proposed discounts and whether the rates are negotiable.

8.1.2. Only Bidders that have achieved a minimum score of 80 points on technical evaluation will be evaluated on price and B-BBEE.

8.1.3. The percentage scored for price shall be calculated by applying the undermentioned formula:

$$P_s = 80(1 - (P_t - P_{min})/P_{min})$$

Where,

- i) P_s : percentage scored for price under consideration

- ii) Pmin: lowest acceptable price
- iii) Pt: price under consideration
- iv) 80: percentage/weight allocated for price

8.1.4. The lowest acceptable bid will obtain the maximum percentage allocated for the price/ price component. The other bids with higher prices for the price component, will proportionately obtain lower percentages based on the above indicate formula.

8.1.5. POLMED shall not be obliged to accept the lowest price bid.

9. PRICING SCHEDULE

YOU ARE HEREBY INVITED TO RESPOND TO A BID OF POLMED	
BID NUMBER	POLMED003/2022/MARKETING
DESCRIPTION	Request for Proposals for appointment of a Service Provider to marketing and advertising services
VALIDITY	90 DAYS

Item	Description of service	Price in RSA Currency (Inclusive of VAT)		
<p>Service Providers must quote for the purpose of bid evaluation, the retainer fee must be based on an estimate of 80 hours per month for the entire Resource pool.</p>				
1	Resource Required	Rate per hour	Number of hours required	Monthly Fee
1.1	Strategy Director			
1.2	Creative Director			
1.3	Art Director/ Graphic Designer			
1.5	Account Director			
1.5	Copy Writer			
1.6	Researcher			
1.7	Other resources required to execute scope (please list below):			
	TOTAL			

10. B-BBEE STATUS

The proof pertaining to the bidder's level contributor status in terms of the B- BBEE Act and the Codes of Good Practice, issued by the dti 11 October 2013, as amended, will be evaluated. Information is available at www.dti.gov.za.

The bidder will be allowed to score up to a maximum of 20 points depending on the bidder's level contributor status as per the POLMED B-BBEE Contributor level scorecard.

The following table will be used to allocate points for B-BBEE where the 80/20 for all Request for Proposals requests.

B-BBEE Status Level Contributor	Points allocated for B-BBEE Level Contributor
1	10
2	8
3	6
4	4
5	2
6	2
7	0
8	0
Non-Compliant	0

The remaining ten (10) will be allocated for B-BBEE bonus points as follows:

An EME or QSE which is at least 51% black owned	5 Points
An EME or QSE which is at least 31% black owned by women	5 Points

11. ADJUDICATION OF THE BID

The scores received for functionality, price and B-BBEE will be added together to obtain a final score for the Bidder. The Tender Evaluation Committee will make its recommendation to the Tender Adjudication Committee on the final score received by each Bidder.

POLMED reserves the right to award the contract to one (1) or more service provider or not to award the contract at all.