

Title: **PROVISION OF THE APPOINTMENT OF A PANEL OF EVENTS AND ACTIVATIONS AGENCIES**

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ABSTRACT

This document forms part of the New Engineering Contract, Professional Services Contract 3rd Edition.

The document defines the Scope of the *services* required from the *Consultants*:

I. Events and Activation Services

- Account management
- Conceptualisation and execution of corporate and campaign events
- Full event management services including:
 - Venue identification and hire
 - Management of invitations and RSVPs
 - Provide protocol advice
 - Booking and management of catering
 - Booking and management of entertainment
 - Booking and management of décor and venue dressing
 - Booking and management of technical staging
 - Design and production of activation collateral (invitations, menus, programmes, signage, etc.)
 - Booking and management of security and emergency services
 - Project and logistics management
 - Arrange JOC certificate for all relevant activations
 - Venue management
 - Photography, videography and livestreaming
 - Transport bookings of *Consultants* and Third-Party contractors (local)
 - Accommodation bookings of *Consultants* and Third-Party contractors (local)
 - Corporate and Lifestyle Events Project Management
 - Activations and Experience (Formal and Informal)
 - Informal research (questionnaires and data capturing) among event attendees
 - Post activation, campagne, event reporting

CONFIGURATION

CONTROL

Document History

Rev.	Date	Preparer	ECPs	Changes
C				
D				

Document Approval

Action	Function	Signature
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This document is a Quality Record and shall be retained in accordance with the Eskom Record Management Procedure.

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ABBREVIATIONS

This list contains the abbreviations used in this document.

Abbreviation or Acronym	Definition
SEM	Socio-economic measure
RSVP	"répondez s'il vous plaît", (Please reply)
SOW	Statement of Works

DEFINITIONS

Term	Definition
Accepted Programme Activity <i>activity schedule</i> <i>Consultant</i> Contract Data <i>Employer</i> <i>key person</i> <i>period for retention</i> Scope <i>services</i> Time Charge	These terms are defined in the New Engineering Contract, Professional Services Contract, 3 rd edition.

Term	Definition
Data Item	A document, drawing or set of data (on paper or in electronic format).
Deliverable	A contractual deliverable in terms of the Scope of <i>services</i>
Milestone	A date on the Accepted Programme by which an identified group of activities has to be completed.
Qualification	All activities required, including analysis, simulation, demonstration and laboratory and field-testing necessary to demonstrate that the design of the Deliverables conforms to the requirements.
Technical Review	A review by the <i>Employer</i> of Deliverables, submitted by the <i>Consultant</i> for Acceptance, as part of the <i>Employer's</i> Acceptance process.

1. INTRODUCTION

The marketing agencies will work on various Eskom marketing campaigns guided by the Eskom programme managers. These marketing agencies will each play a key role in the planning, execution, and management of marketing campaigns.

The reasoning for the appointment of a panel of agencies is to ensure sufficient resources to do events and activations on the many campaigns run by Eskom. The following marketing campaigns have been running for the past few years, and more campaigns may start in the coming years as Eskom's turnaround strategy starts to take shape and is adopted by the business units:

- Eskom Development Foundation projects, incl Eskom Expo for Young Scientists
- Energy Losses and Revenue Recovery
- Smart Metering
- Virtual Wheeling
- Generation external campaigns
- Public Safety
- National Nuclear Energy Education Strategy
- Demand Management and Energy Efficiency
- Demand Response
- Internal & External Projects and Campaigns
- Energy Crisis Communication
- Educational Campaigns and Eskom schools programme
- Winter and Summer plans (national)
- Air quality off-set project
- Eskom Brand Campaign
- With appropriate permissions (re- NT Guidelines) Eskom Group Recognition Awards
- Eskom Women's Events programmes and Special Projects

The ideal would be for specific Events and Activation agencies to run with specific events and campaigns, for instance the Corporate Affairs campaigns, and the campaigns of the Divisional Divisions and Subsidiaries of Eskom campaigns. This will ensure that all the agencies can resource the Eskom account accordingly.

1.1 SCOPE

The aim is to appoint a panel of Events and Activations agencies to provide a service to Eskom events and marketing campaigns. A panel of agencies are required for Eskom's different campaigns and projects as and when required. A rotational strategy will be utilised in the selection process for an appropriate agency out of the panel to run with any job at on a PAYG basis will be utilised.

Events, campaigns and Activations Agencies: Promote companies or their campaigns via key corporate events or campaign-related urban and rural events. The main purpose of these events is to celebrate key milestones or for specific stakeholder engagement and education related to various campaigns. The agencies will also need established connections, and supplier lists for each region in the country. The agencies will need these suppliers so that they can plan, execute, and manage events, community activations, roadshows, exhibitions, conferences, and any other type of event.

1.2 EMPLOYER'S OBJECTIVE

The *Employer's* objective is to –

- rebuild the Eskom reputation
- inform the South African public about the electricity supply situation and energy-related matters;

- reach residential, business (commercial, mining and industrial), and agricultural consumers with proposals for load shifting during peak times, and overall profile optimisation and promote products/services;
- explore alternative media platforms such as focused corporate and campaign events;
- position Eskom as a promoter of science and technology in South Africa;
- promote small business and empower women in business;
- recover debt and minimise non-technical energy losses;
- educate the lower SEM markets on the safe and efficient use of electricity; and
- educate our target audiences about our efforts to reduce carbon emissions and improve the lives of people in the areas where we generate electricity.

1.3 BACKGROUND

Eskom is now in a turnaround phase – looking at new business opportunities (possibly beyond our borders), reflecting on our current structure and finding ways to return the utility to the global stature that we once had. Key to these endeavours is focused stakeholder engagement and advocacy – a key priority in the new Corporate Plan.

The marketing agencies have over the years played a key role in providing the skill sets that Eskom does not have – production skills, creative skills, strategic skills, media buying skills, and research networks. Steered by the campaign managers in Corporate Affairs and other Eskom divisions, the agencies have helped us build memorable and impactful programmes and campaigns.

Going forward, there will be an even stronger focus on stakeholder engagement – extending beyond the efforts made to date. There will be a stronger focus on targeted stakeholder engagement to get customers to participate in managing the demand on the electricity network effectively in the short term; to position new Eskom products; and to grow sales and revenue. Through the central influence from the Strategic Marketing and Branding Team, all campaigns will promote the vision of Eskom's turnaround strategy and corporate plan.

1.3.1 Activities on tasks

The *services* described in this Scope are divided into Activities as identified in section 3.

1.3.2 Work Breakdown Structure

The Work Breakdown Structure (Detailed scope) for the *services* is attached as Appendix A.

1.3.3 Statement of work

The *services* to be delivered are set out in the Statements of Work (SOW) - Appendix A. A SOW consists of a set of activities and deliverables.

The *Consultants* perform the prime activities stated in Chapter 3.

In support of the prime activities, the *Consultants* perform the associated activities stated in Chapter 4.

The technical contents of the *Consultants'* Deliverables are described as part of the Activities in Chapter 3.

The general format requirements for Deliverables are specified in paragraph 7.1 of Chapter 7.

The schedule for the submission of Deliverables and review meetings is as per the Programme.

2. APPLICABLE DOCUMENTS

Applicable documents form an integral part of this document, unless specifically otherwise stated.

2.1 STANDARDS, GUIDELINES, HANDBOOKS AND REGULATIONS

	Document Title	Document Number	Revision
[1]	Ethics Policy	32-173	4
[2]	Eskom Travel Policy	32-1041	6
[3]	Events Management Procedure	240-97192186	3
[4]	Eskom Corporate Identity Manual – Summary	240-103414344	4
[5]	Eskom Procurement and Supply Chain Management Procedure	32-1034	5
[6]	Standard for Establishment and Use of Panel Contracts	240-150133318	1

3. SCOPE OF SERVICES

3.1 EVENTS AND ACTIVATIONS

3.1.1 Event Strategies – The Events, Campaigns and Activations panel of agencies are expected to –

- a) study and understand the *Employer's* business, which includes but is not limited to: the organisational structure, operating environment, operating principles, regulation, shareholding, and stakeholders. This understanding is essential for the *Consultants* to analyse and interpret what needs to be achieved with every event/activation, what the measures of success are and how the messaging can be optimised to the target audiences;
- b) develop event and activation strategies which set measureable objectives, identify target audiences, develop communication messages, and determine how best the event/activation can achieve the marketing objectives of the specific campaign or the objectives of a specific corporate event.

3.1.2 Events, Campaigns and Activations panel of agencies are expected to –

- a) provide activation ideas to the *Employer* to support a marketing campaign. Many of the current campaigns are focused on rural and peri-urban communities, so the *Consultants* must have a history of working in communities, showing their capability to understand the dynamics of each community, and to translate this understanding into an engaging activation to which the audience can relate.

- b) once the event/activation idea has been approved, the *Consultants* will be responsible for the full execution and management of the event/campaign/activation, which includes invitations, managing RSVPs, venue identification and hire, catering, transport, accommodation, logistics, labour, and post-activation reporting. A list of responsibilities is provided in Appendix A – Work Breakdown Structure.
- c) The agencies will work on various Eskom marketing campaigns, events and activations guided by the Eskom programme managers and will work with the creative, PR and media buying agencies in the strategy, planning, execution, and management of marketing campaigns, events and activations where required.

4. ASSOCIATED REQUIREMENTS AND ACTIVITIES

4.1 PROJECT MANAGEMENT

4.1.1 Project Manager

The *Consultants* appoint an Account Manager as a *key person* who –

- functions as the single point of contact between the *Employer* and the *Consultants*; and
- plans and manages the delivery of the *services* in accordance with the Contract requirements.
- The *Employer* shall approve the *Consultants*' proposed *key persons on the account*.

4.2 PROGRAMME AND PLANNING

The *Consultants* provide skilled strategic and planning staff members to prepare and report on planning and scheduling activities for the duration of the project. The *Consultants* will be required to have access to any software needed for this service, and to keep the software maintenance contracts updated to ensure service delivery.

4.2.1 Baseline and accepted programme

- a. The *Consultants* plan their own work. The *Consultants*' plans take cognisance of project and contract milestones and comply with such.
- b. The *Consultants*, under the direction of the *Employer*, develop an event/activation plan for each Eskom event/activation briefed in.
- c. *The Consultants* ensure that their event plan is structured to provide all the necessary control and reporting functionality.

4.2.2 Details of the accepted programme

The Accepted Programme includes the information that is required by the task order and purchase order.

4.3 Progress monitoring and reporting

4.3.1 Progress made with a task order

The Consultants should regularly review the progress made with the task order to assess the remaining durations, expected completion dates, and percentages completed. In addition, the *Consultants* provide trends relating to major project milestones.

Per task order, the *Consultants* submit the following:

- A cost estimate for the work on the brief
- Third-party cost estimates, if applicable
- Financial report
- Event plan with estimated completion dates

4.3.2 Progress reporting

The *Consultants* submit progress reports on a monthly basis to the contract manager, by the 7th of the relevant calendar month, covering the period up to the end of the previous month. The progress reports, using the individual event *budgets* as a basis, cover the following issues:

- Billings per event/activation
- Details and stage of each task order given by the *Employer*.

The progress reports are discussed during the scheduled Progress Review Meetings. The *Consultants* propose to the *Employer* a schedule for the Progress Review Meetings. The Progress Review Meetings are held as and when required and can be held via online meetings.

4.4 QUALITY MANAGEMENT

- a. The *Consultants* establish and maintain a quality management system that conforms to the requirements of ISO 9001:2015.
- b. The Quality Plan is delivered to the *Employer*-appointed quality representative before the appointment of a supplier.
- c. The *Employer* has the right to carry out periodic audits of the *Consultants*' management of quality, as well as specific audits, and reserves the right to appoint an independent body to perform all quality audits.

4.5 REVIEW AND ACCEPTANCE OF DELIVERABLES

Deliverables generally follow the process outlined below:

Table 1: Process for Review and Acceptance of Deliverables (in the case of a fee remuneration methodology)

Task order activation process

The task order activation process will be conducted via the rotational basis to ensure the principle of equitable, fair, and transparent work allocation across panel members.

The detailed process will be clearly defined in the approved Terms of Reference.

4.6 REVIEW MEETINGS

- a. The *Consultants* and the *Employer* will review the Deliverables in the meetings that the *Employer* organises and schedules.
- b. The *Consultants* ensure that all follow-up actions are carried out within the time stipulated.
- c. The *Employer* may, in addition to the scheduled review meetings indicated, request additional reviews.
- d. The *Employer* may involve independent third parties in any of the review meetings.

4.7 REVIEW MEETINGS

- a. The *Consultants* and the *Employer* will review the Deliverables in the meetings that the *Employer* organises and schedules.
- b. The *Consultants* ensure that all follow-up actions are carried out within the time stipulated.
- c. The *Employer* may, in addition to the scheduled review meetings indicated, request additional reviews.
- d. The *Employer* may involve independent third parties in any of the review meetings.
- e. The schedule and the scope of planned review meetings are indicated in Table 3.

4.8 PROGRESS MEETINGS

The *Employer* and the *Consultants* hold regular meetings to review the progress made with the event/activation plan, to discuss early warnings, etc.

The *Consultants* agree on the frequency and venue of the progress meetings with the *Employer*.

The *Consultants* agree on a schedule for the progress meetings with the *Employer*.

The *Consultants* keep minutes and action items of these meetings.

Note: Minutes of meetings will not form any basis for variations or amendments to the contract. The *Employer* communicates contract variations or amendments formally and separately to the *Consultants* by means of a contract addendum.

5. DELIVERABLES

5.1 SCHEDULE OF DELIVERABLES

The *Consultants* undertake the analysis and delivers the documentation, listed in Table 2, to the *Employer* for review and acceptance. (The schedule indicates the task of “Submit for Acceptance” as referred to in **Error! Reference source not found.**)

Table 2: Schedule of Deliverables

No.	Description	Reference Paragraph	Review Meeting No.	Delivery for Acceptance/ Frequency
1.	Prime Activity: Events and Activations			
	Deliverables for Events and Activations : <ul style="list-style-type: none"> • Develop an Event/Activation plan that resonates with the target market to achieve marketing objectives. • Plan and execute the events/activations • Do a post-event close-out report 	3		As per agreed schedule
2.	Project Management	4.1		
2.1	Progress Reports	4.2		Monthly
2.2	List of Contractual Deliverables	5.1		Per revision
2.4	Programme	4.2		Per revision
3	Review Meetings	4.7		
3.1	Attend Review Meeting 1.	4.7	1	At start date
3.2	Attend Review Meeting 2.	4.7	2	monthly

Notes:

1. The *Consultants* may combine or separate Deliverables after written approval from the *Employer*. In this event, the *Consultants* revise the schedule of Deliverables accordingly.
2. The *Consultants* submit a list of all Deliverables (including the applicable document revision number) to the *Employer*. The *Consultants* revises the list and submit it to the *Employer* when the Deliverables change. Discussion of status reports and activity schedule.

5.2 SCHEDULE OF REVIEW MEETINGS

Deliverables are reviewed and discussed during scheduled review meetings as indicated in Table 3.

Table 3: Planned Review Meetings

Review Meeting No.	Objective of the Meeting	Schedule*	Duration	Venue
1	Kick-off meeting Review Logistics and schedule requirements	0,5	1 day	<i>Consultant's Offices</i>
2	Discussion of status reports and activity schedule	monthly	1 day	<i>Employer's Offices/ video conference</i>

* Months after *starting date*.

6. RECEIVABLES

6.1 DOCUMENTS AND DRAWINGS

The *Consultants* are responsible for obtaining the documents referenced in paragraph 2.1.

6.2 OTHER RECEIVABLES

The *Employer* shall provide other documents as required for each Task Order.

6.3 ADDITIONAL INFORMATION REQUIRED

The *Consultants* identify any additional information required from the *Employer*, and indicates it accordingly as part of the Programme

6.4 CHANGES TO EMPLOYER-FURNISHED INFORMATION

The *Consultants* do not alter the content of any *Employer*-furnished information or data without the written authorisation of the *Employer*. Should the *Consultants* have any doubt about the suitability or correctness of any *Employer*-furnished information or data, or have proposals for changes, the *Consultants* advise the *Employer* accordingly at the earliest opportunity. The *Consultants* ensure that the Deliverables, using *Employer*-furnished information or data, are in accordance with the specific requirements of such Deliverables.

7. REQUIREMENTS APPLICABLE TO DELIVERABLES

7.1 GENERAL DOCUMENT FORMAT

7.1.1 General

- a. All documents, except data sheets, shall conform to the formatting standards listed in paragraph 7.1.2. Any deviation from this format has to be agreed to in writing by the *Employer*.
- a. Where no standard is prescribed, the *Consultants* propose the format and contents to the *Employer* for review and acceptance.
- b. All deliverable data are expressed in SI (metric) units of measurement.

7.1.2 Document format

7.1.2.1 Document and data numbering

A unique Identification Code Number is assigned to each contract amendment document or data so that it can be –

- correctly associated with its related data and items;
- referred to precisely; and
- retrieved when necessary.

7.1.2.2 Revision identifiers

Documents and data have revision identifiers to indicate the current revision status.

7.1.2.3 Document identification

- a. Each document provides the data, as listed below, to properly identify the document. The following are indicated on each page of a document:
 - Company Name
 - Proprietary Classification
 - Document title
 - Document number
 - 'Revision' – document revision identifier
 - Date
 - "Page number" of the "number of pages"
- c. Each page of a document, including all attachments, is numbered consecutively from the first to the last page.

7.1.2.4 Amendment history

Each document includes an amendment history which indicates the following for each revision:

- Revision identifier.
- Date (either release date or effective date).

- Preparer.
- Reasons for the change, including references to proposals for specific approved change/s (including Engineering Change Proposals (ECPs)).

When a document is being revised, the revised areas must be indicated clearly in the right-hand margin. When the entire document is being revised, the indicators in the right-hand margin are not required, and the statement 'Entire Document Revised' appears with the reasons for the change.

7.1.2.5 Approval signatures

Each document includes the names and signatures of the preparer, reviewer and approver.

7.1.2.6 Other data

Each document includes the following data, where applicable:

- Programme/project name and number and/or contractual agreement reference number.
- Applicable programme/project baseline.
- List of abbreviations and acronyms used.
- Contract data item identifiers.
- Associated product (hardware or software) or task name.
- Applicable associated product (hardware or software) or task baseline.
- Associated product (end item), part, or software identifying number, and revision/version identifier.
- Associated correspondence – document number, subject, date, references.

7.2 FORM OF DOCUMENT RETENTION

Copies of documents, records, calculations, and associated raw data are stored in a format that can be read by the user, or converted to human readable form, regardless of the media used. Copies are stored in such a way that they remain legible, readily identifiable, and retrievable for the entire lifetime of the *services*.

7.3 DOCUMENT COPIES AND SOFTWARE FORMATS

Documents are submitted as one hard (paper) copy, one soft copy in Adobe pdf format and another software copy in Microsoft Word format, on a compact disk which is uniquely identified on its label as to:

The export of database information from the *Consultant* to the *Employer* is in Microsoft.

7.4 DRAWING STANDARDS

Dimensions are expressed in SI (metric) units of measurement.

8. APPENDIX A: DETAILED SCOPE OF SERVICES (WBS)

Events and Activations

No	Service
ACCOUNT MANAGEMENT	
1	Attend Client meetings, workshops, information gathering and brainstorming sessions
2	Obtain and verify Client briefs
3	Issue contact reports
4	Attend status meetings
5	Provide advice and guidance on planned corporate events/campaign activations
6	Issue status reports for all projects that include but are not limited to project number, description, current status, next steps, timeline and due date
7	Screen work before presentation to Client (on brief and plan)
8	Submit work for approval by Client
9	Prepare and submit event/activation timing plans
10	Obtain sign-off from authorised Client representative
11	Manage third party suppliers
12	Coordinate and manage deliverables
13	Prepare financial reconciliations
14	Prepare and submit cost estimates
15	Provide three quotes for third party amounts exceeding R100 000
16	Maintain a digital guard-book, of all work done for the Employer, information must be indexed and arranged by programme.
17	Issue invoices and statements
18	Manage and resolve financial queries
19	Issue financial reports
INTERNAL AND EXTERNAL PROJECT & ACTIVATION MANAGEMENT SERVICES	
20	Ideation of activation concepts
21	Venue identification and hire
22	Management of invitations and RSVPs
23	Provide protocol advice
24	Booking and management of catering
25	Booking and management of entertainment
26	Booking and management of décor and venue dressing
27	Booking and management of technical staging
28	Design and production of activation collateral (invitations, menus, programmes, signage, etc.)
29	Booking and management of security and emergency services
30	Project and logistics management
31	Arrange JOC certificate for all relevant activations
32	Informal research (questionnaires and data capturing) among event attendees

33	Venue management
34	Photography, videography and livestreaming
35	Transport bookings (local)
36	Accommodation bookings (local)
37	Accommodation bookings (international)
38	Post activation reporting

9. Divisions and Teams Consulted in no particular order: