



# Tender Briefing Session

**FOR THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE AN EMPLOYEE ASSISTANCE PROGRAMME (EAP) FOR A PERIOD OF THREE (3) YEARS.**

TCC/2025/03/0001/90783/RFP

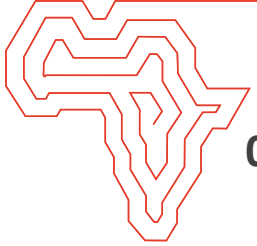


Presented By:  
**Nhlanhla Caluza**  
Strategic Sourcing Manager

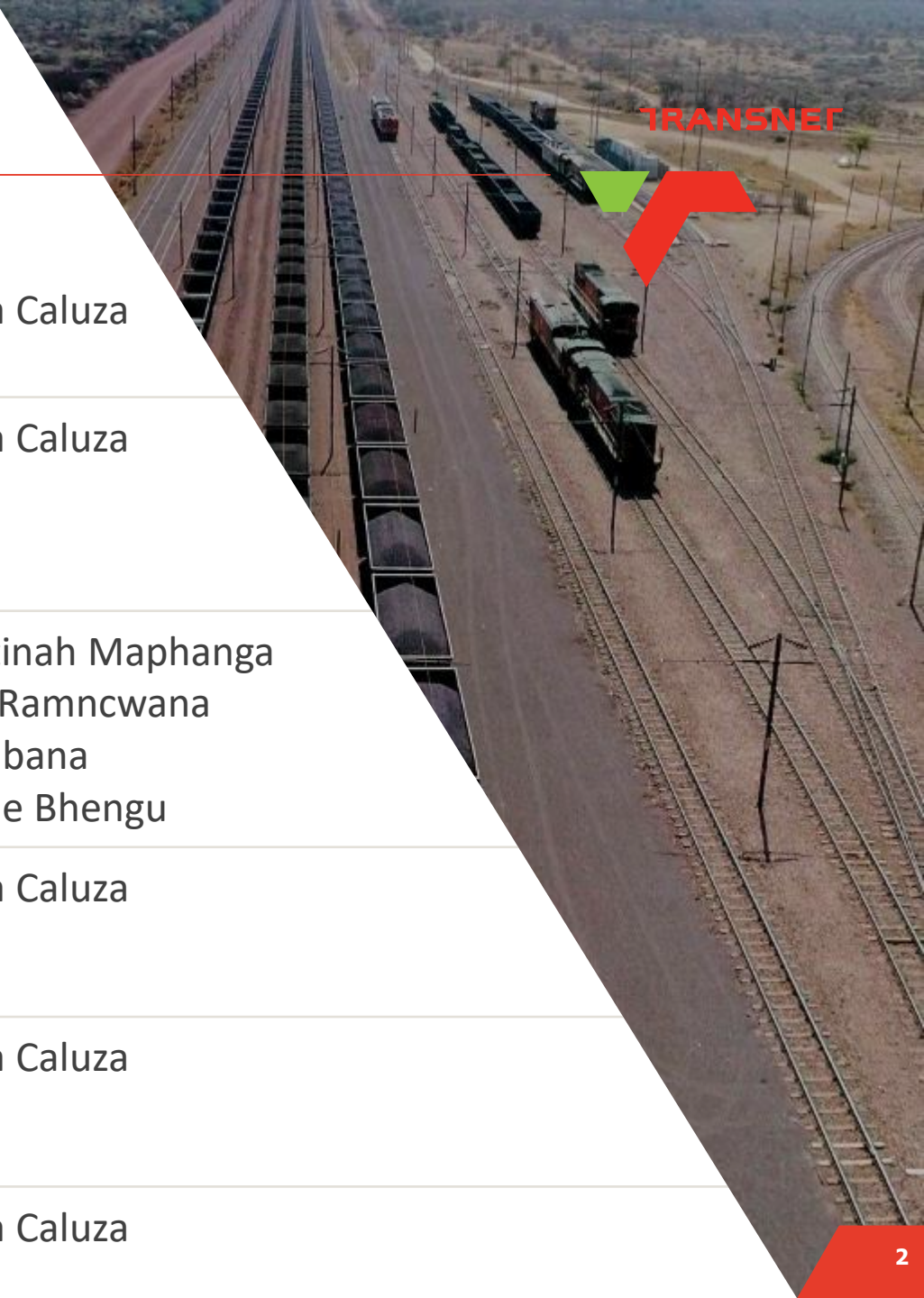
14 April 2025  
**Non-Compulsory Briefing\*\***

# AGENDA

Time allocation and presenters



|           |                                                                                                                                     |       |                                                                                 |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------|-------|---------------------------------------------------------------------------------|
| <b>01</b> | <b>Welcome and Introductions</b>                                                                                                    | 10min | Nhlanhla Caluza                                                                 |
| <b>02</b> | <b>Rules of Engagement</b> <ul style="list-style-type: none"><li>- Timeline and key dates</li><li>- Submission Guidelines</li></ul> | 5min  | Nhlanhla Caluza                                                                 |
| <b>03</b> | <b>Scope of Work</b> <ul style="list-style-type: none"><li>- Key Deliverables</li></ul>                                             | 25min | Dr Christinah Maphanga<br>Zikhona Ramncwana<br>Phiwe Mbana<br>Khanyisile Bhengu |
| <b>04</b> | <b>Procurement Process</b> <ul style="list-style-type: none"><li>- Submission Guidelines</li></ul>                                  | 10min | Nhlanhla Caluza                                                                 |
| <b>04</b> | <b>Evaluation Methodology</b> <ul style="list-style-type: none"><li>- Evaluation Criteria</li></ul>                                 | 10min | Nhlanhla Caluza                                                                 |
| <b>05</b> | Q/A                                                                                                                                 | 5min  | Nhlanhla Caluza                                                                 |



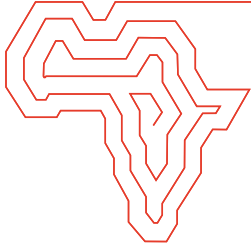


# Introduction

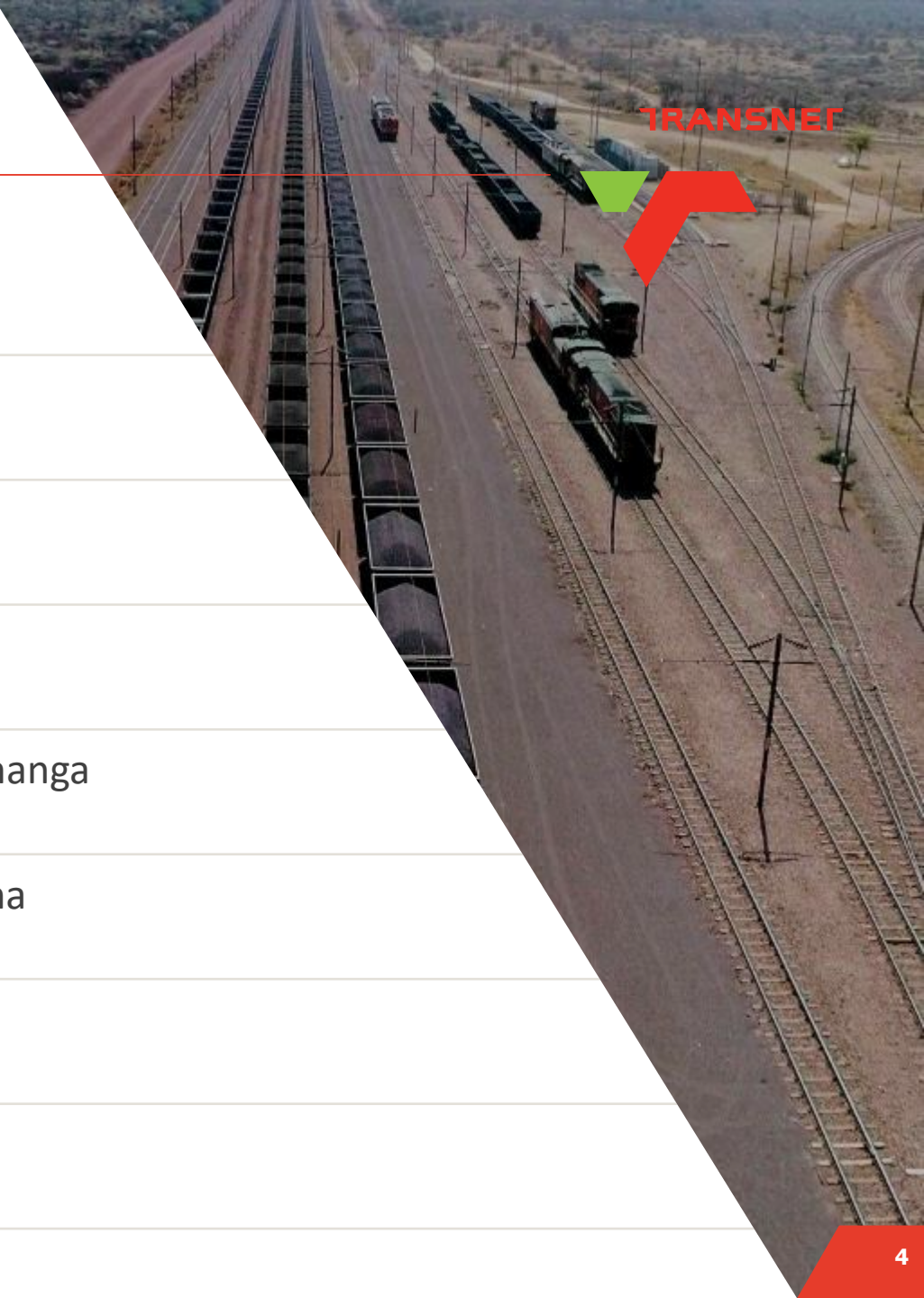


# WELCOME

## Team Introductions



|    |                   |                        |
|----|-------------------|------------------------|
| 01 | Procurement       | Nhlanhla Caluza        |
| 02 | Procurement       | Basetsana Moeng        |
| 03 | Procurement       | Sisanda Ngoyiyana      |
| 04 | People Management | Dr Christinah Maphanga |
| 05 | People Management | Zikhona Ramncwana      |
| 06 | People Management | Phiwe Mbana            |
| 07 | People Management | Khanyisile Bhengu      |





- This briefing session is non-compulsory.
- An approximate time allocation of 1 hour has been catered for, the session could end sooner or later, depending on the volumes of clarification questions.
- An opportunity for Clarification questions and answers will be provided after each briefing category.
- All questions will be recorded, and the answers will be consolidated and forwarded to all bidders whose attendance has been confirmed by Transnet. The aim is to provide the consolidated response within 48 hours after the session. Any additional clarification questions hereafter will only be accepted by Transnet until **12h00 on 22 April 2025**.
- Response to clarification questions will be provided to bidders via email.
- All communication subsequent to this briefing session, before the closing date and time, must only be directed to the [Nhlanhla.Caluza@transnet.net](mailto:Nhlanhla.Caluza@transnet.net)
- A copy of this presentation will be provided to all bidders who attended the meeting.



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# Overview of the Tender & Scope of Services





## 1. BACKGROUND

Employee Assistance Programs (EAPs) is a short-term and voluntary work-based intervention, offered by employers as an employee benefit to provide support for employees who are experiencing life challenges or stressors that may impact their psycho-social functioning and productivity. EAP programs are designed to deal with many issues that confront modern-day employees like high-stress levels, economic challenges, personal and mental health issues that may negatively affect health, absenteeism, and productivity. EAP programs include counselling services to help employees overcome the negative effects of these challenges and are also equipped to provide preventive services and health promotion.

Transnet recognizes that personal, professional, and environmental stressors if detected early, can prevent, or alleviate poor performance, accidents, and absenteeism. (EAPs) are crucial in today's workplace due to high-stress levels, economic challenges, and personal and mental health issues. EAPs address workplace stress, interpersonal relationships, organizational culture, financial stress, increased pressure, and mental health disorders. EAP service offerings include counselling, confidential assessments, and referrals for stress, anxiety, depression, substance abuse, and family problems. They improve productivity, reduce absenteeism and turnover, and create a supportive work environment. EAPs also reduce stigma associated with mental health and offer holistic support services beyond traditional counselling. Implementing a robust EAP can significantly enhance employee well-being, leading to a healthier, productive, and harmonious workplace. Modern EAPs operate by developing effective communication strategies, coaching and development, team alignment and conflict resolution, crisis management, comprehensive support services, work-life balance, and enhancing organizational culture. They contribute to building resilience, promoting well-being, and contributing to a positive organizational culture.

Implementing a modern EAP can significantly enhance organizational effectiveness, improve employee well-being, and create a supportive and resilient workplace. The post-global pandemic has also forced profound changes in our employees' personal and professional lives and will continue to test our capacities to relate in unprecedented ways. Employees are confronted with high debts due to the weak economy, social isolation, speed of change, interface with technology and mental health issues. Given the current challenges, a proactive and interdisciplinary approach must be adopted, that is geared towards addressing emerging health and wellness needs. To this end, the company has implemented an EAP, that seeks to address personal and work-related issues. The aim is to empower employees with requisite life and other skills to cope with difficult life challenges and work-related stressors so that work performance is not compromised. The EAP also assists Managers in their duty of care and performance management and provides support to enhance their managerial capacity to manage challenged employees.

**The scope of work which is listed below is cater for Employee Assistance Programme (EAP) for approximately 55 000 Transnet employees and their dependent family members.**

Transnet seeks to appoint a service provider to render a world-class and innovative EAP, which will adhere to the quality, standards, and norms of the industry in line with regularity standards ethics, clinical standards and protocols in an evolving and flexible manner. The service provider should also be able to deliver this programme in 12 official languages endorsed in South Africa. Transnet employees and their dependents must be able to access virtual services from wherever they may be located including outside of South Africa. The service provider needs to have national footprint which will cater for Transnet in all operational areas . This should include the capability to provide face-to-face counselling in all areas including remote areas like (Sishen, Carolina, Ulundi, etc.).



## **1. The service provider will render services across all six Core Operating Divisions (ODs) of Transnet:**

1. Transnet Port Terminals (TPT).
2. Transnet National Ports Authority (TNPA).
3. Transnet Engineering (TE).
4. Transnet Freight Rail (TFR) TFROG and TRIPM.
5. Transnet Pipelines (TPL).
6. Transnet Property (TP).
7. As well as all Transnet Support units, including but not limited to Transnet Corporate Centre (TCC) and Transnet Academy.

## **2. Transnet requires to implement the following:**

- a) An EAP that is beyond the basic standards of a typical EAP programme i.e.
  - ☐ Counselling & debriefing Services
  - ☐ Education, Awareness & Training
  - ☐ Marketing & Communication
- b) Organizational services consultation Services

## **3. Targeted interventions, supported by business intelligence using the following performance metrics:**

- a) Utilization Rate
  - b) Engagement rates
  - c) Unplanned absenteeism rate
  - d) Sick absenteeism rate
  - e) Return on investment.
4. An EAP that is aligned to Transnet's organizational strategy and must be effective, integrated and premised on strong principles of partnerships and accountability.
  5. A programme that is flexible and evolves over time to respond to the changing needs of Transnet.
  6. An EAP programme that can address the emerging health and wellness risks, health scares and pandemics.
  7. The selected EAP provider should be able to deal with all levels of employees including having a clear plan of servicing employees living with disabilities.
  8. Transnet needs a service provider which will be able to provide debt management services for example debt mediation, reviews, rehabilitation and consolidation.
  9. The programme must be delivered nationally and within the timelines agreed upon depending on the nature of the service as agreed upon.



10. The service provider must advance digital technology, however, should also be able to engage in physical sessions when required.
11. The service provider must be able to demonstrate the capacity to implement other human capital related projects such as coaching, team interventions and organizational health and culture programs. The coaching programme should be able to address issues of abrupt behavior (such as bullying) with relevant and appropriate experts to deal with such matters.
12. The EAP support and services must consider various ways of working and the possible negative impact on employees, which may include remote working, managing virtual interactions and social isolation.
13. The service provider must engage with the different operating divisions in a meaningful way by customizing services and products to the business requirements of each operating division.

## **2. THE SCOPE OF WORK WILL INCLUDE THE FOLLOWING AREAS:**

### **2.1. Counselling Services (Capitation Fee)**

Types of Counselling required will include but not be limited to the below:

- 2.1.1. Debriefing for critical incident stress and trauma
- 2.1.2. Preventative wellness programs
- 2.1.3. Loss and bereavement
- 2.1.4. Issues with family and relationships
- 2.1.5. Divorce Issues
- 2.1.6. Physical and emotional abuse
- 2.1.7. Problems at Work/School
- 2.1.8. Financial management & Legal Issues
- 2.1.9. Interpersonal communication
- 2.1.10. Alcohol, gambling, and substance addiction.
- 2.1.11. Trauma, HIV/AIDS, and other chronic diseases, as well as anxiety, stress, depression, and suicidal thoughts.
- 2.1.12. The service provider must provide a toll-free supportive counselling service for Transnet employees and their dependant families members 24 hours a day, 7 days a week, 365 days a year.



- 2.1.13. The service must include counselling for teenagers. The service must include counselling for children especially when there is a death / traumatic event.
- 2.1.14. The model must include a minimum of six (6) counselling sessions per employee per issue, with the option to extend the sessions on an “as and when” required basis which requires pre-approval by the Operating Division Employee Wellness Programme (EWP) manager. There should be an opportunity to request two more if needed, based on merit.
- 2.1.15. The service provider must offer counselling to employees and their dependent family members, with at least 90% face-to-face and 10% virtual sessions.
- 2.1.16. The service should be available in the eleven official languages including sign language and the national footprint of the Service provider to be sound to accommodate Transnet employees at remote sites across the country. The availability of the affiliates needs to match the Transnet geographical map Trauma debriefing must be available twenty-four hours a day, seven days a week and three hundred and sixty-five days a year. After-hours access to this type of service must be available.
- 2.1.17. The service package must include:
  - (a) In-person session
  - (b) Electronic on-line advisory services
  - (c) SMS & Call back system
  - (d) Management advisory
- 2.1.18. The service provider must be able to set up on-site (counselling clinics) as per the Transnet protocol on size and number of employees on site and accessibility of the site, including remote sites.
- 2.1.19. The service provider must provide reports on individual formal referral counselling cases that must follow the following format:
  - (a) Formal report after the second session, to provide progress
  - (b) Final report after the final session; and
  - (c) Regular progress feedback in between to the EWP manager(s) or referring agent.
  - (d) The latter may be in the form of an e-mail or written feedback for record keeping.
- 2.1.20 The service provider must provide confirmation and a plan regarding the following:
  - (a) A continuity plan for dealing with unforeseen matters including when the call centre is down and a plan for immediate replacement of exiting key account managers which could compromise or disrupt the services.
  - (b) Have a mechanism to prove that contact was initiated with the client e.g. SMS response confirmation.
  - (c) To implement a reference number tracking system and share call centre protocols within a week of service launch.

- (d) To provide Transnet with registered affiliates who have a proven track record and follow standardized professional processes of their professional bodies. The services provider must also provide a clear record of vetting affiliates and their premises where they provide services. The service provider must have a clear on-boarding plan for all affiliates and professional consultants who will serve on the Transnet contract.
- (e) Ensure active involvement of key account managers in Transnet processes and be proactive in addressing issues of wellness in Transnet and be able to escalate unresolved issues.
- (f) The capacity to dispatch specialized training skills when required. e.g., Counsellors with trauma management experience.
- (g) To develop effective communication strategies within the organization to ensure that employees are well-informed about available resources and support, as well as to provide a communication and marketing plan to improve Employee Assistance Programme service delivery.
- (h) The communication and marketing plan must include how the service will be delivered to all levels of employees and implement surveys that will continue to assist Transnet to understand and be informed of the current state of wellness. These surveys must use an approved model in assessing the behavioural performance of the organisations based on wellness issues that could be identified.

## 2.2. Awareness, education, and training (Group Sessions) (Capitation Fee)

### **Transnet will accommodate both in person and on-line sessions based on the request and agreements**

2.2.1. The briefing sessions on the EAP services must be limited and must form part of the capitation fee.

2.2.2. The awareness session on the following topics:

- (a) Financial Management,
- (b) Fatigue Management,
- (c) Trauma Management,
- (d) Mental health which will include but not limited to stress management, self-care and resilience,
- (e) Substance Abuse including gambling programmes,
- (f) Anti-smoking programmes,
- (g) Relationships & Parenting,
- (h) Conflict Resolution and



I). Antibullying.

2.2.3. These sessions should be no longer than one (1) hour and will thus be included in the capitated fee (300 sessions per annum).

2.2.4. The briefing sessions will include employees, HR managers and relevant stakeholders.

2.2.5. Managerial training and training of all HR practitioners must be offered. All training material must be customized to the target group.

2.2.6. Training on various business needs and risk emanation from the business. These would include but not limited to the marine cadet life skill programme, diversity management, personal mastery and resilience enhancement, conflict resolution, woman and gender and stress management.

2.3. Health, Wellness and Risk Management (Fee for service structure)

2.3.1. The health, wellness and risk management services must include:

- (a) Personalised health risk assessment which will form part of the wellness day offering.
- (b) Support and engagement with employees after health risk assessments as part of a follow-up plan.
- (c) HIV Counselling and Testing (HCT) be conducted as component of wellness days within an integrated model or as campaigns, as decided by the various Operating Divisions.
- (d) The management of wellness days with the Transnet functionaries ranging from project planning, sourcing providers, engagement with on-site functionaries and managing the overall event.
- (e) The overall wellness day management fall within this ambit.
- (f) Working with medical schemes or other providers to assist employees in managing their health risks.
- (g) The demonstration of an on-line system to track employees who have health risks and for subsequent follow-up.



## 2.4. Executive Wellness (Fee for service structure)

Transnet standard is to provide a bi-annual executive wellness assessment which is risk-based and considers Physical risks, a mental health and stress inventory, burn-out inventory and any other risks that individual Executives may encounter in the course of their jobs.

The executive wellness services must include the following:

- (a) Ensure an active follow-through, engagement and after assessment support strategy for executives.
- (b) One-on-one-engagement sessions once a month that will support Executives in their own environment.

## 2.5. EAP Consulting services

The Employee Wellness programme of Transnet has become an important business intervention in enhancing performance and in the business retaining a competitive edge. This has been achieved mainly through the EAP being a major consultant to the business in designing and implementing solutions to business needs.

- (a) Life-skills and support programme, e.g., resilience programme and other tailor-made life skills programmes
- (b) Fatigue management

2.6. The Service Provider must demonstrate a competence in assisting Transnet with the above and would not be limited to the projects and programmes / solutions mentioned above.

2.7. The expectation would be to assist in research, design, plan, implement and monitoring of new projects required by the business; and

2.8. **These could also include talk shops as opposed to workshops monthly to address trends identified on:**

- (a) Fatigue management
- (b) Relationship issues – work and personal
- (c) How to deal with conflict
- (d) Resilience building in our changing environment
- (e) How to deal with change
- (f) Stress management
- (g) Money matters



## 2.9. **Lifestyle management services which include advanced debt management, review, and consolidation (capitation fee structure)**

The bidder must provide coaching & advice to Transnet employees regarding the lifestyle management services including the following:

### 2.9.1 Advanced Financial Management

#### 2.9.2. Debt rehabilitation and management inclusive of:

- (a) debt counselling and debt review and negotiate with creditors on behalf of employees.
- (b) Debt consolidation and assist with debt recovery.
- (c) Ability to engage with both managerial and non-managerial employees.
- (d) Workshops on money tips.
- (e) Face-to-face contact and coaching for the employees on financial wellness matters with availability of onsite consultants to engage with employees as required, which at least 60% of cases will be face to face.
- (f) Broader Financial Management and Literacy (Money management and budgeting).
- (g) Model of limitless telephonic and electronic access and a maximum of 3 face to face contact sessions per financial challenge experienced.
- (h) Legal advice and guidance.
- (i) Value Added Services



## 2.10. **Marketing and communication services**

Marketing and communication services must include the following, the design and printing in colour of which should be included in the capitation fee structure:

- a) Design a marketing and communication plan, which will take into the creation of content for supporting the Transnet EAP, by a Content Enablement Strategy, reinforced by an action plan that integrates Transnet Corporate Plan, and the Wellness its employees, into an EAP Marketing and Communication (Content Enablement) Charter.
- b) The creation and distribution of promotional material, which must be Transnet branded in line with the Corporate Identity Guidelines.
- c) Promotional items will amongst others consist of:
  - i. Online communication and marketing, e.g., able to facilitate webinars etc.
  - ii. Posters
  - iii. Wallet cards
  - iv. Brochures / pamphlets /digital posters
  - v. Manager / supervisor, HR user guides (booklets and hand-outs)
  - vi. Production of DVDs on various EAP related topics
  - vii. Management of the website
  - viii. Social media platforms
  - ix. SMS; WhatsApp, mobile apps, etc.
  - x. E-mailers
  - xi. Screen savers
  - xii. Articles, and
  - xiii. Adapt to the use of technology and evolving trends in the marketing and communication space.
- d) Innovative ways of engagement and flexibility (cover non-management - and managerial employees)

2.11. The Service Provider must be involved in on-site marketing and communication of services, campaigns and road shows.

2.12. Orientation sessions for managers and employees; and



2.13. The Service Provider must demonstrate marketing and communication expertise either internal to the company or as an outsourced competency.

2.14. Programme management

**The programme management must include the following:**

- a) The provision of an overall key account manager for the Service Level Agreement as well as dedicated account managers per Operating Division. The key account manager will work closely with Group Occupational Health and Wellness and the OD's.
- b) The service Provider must orientate their call centre agents, account managers and relevant functionaries to the business of Transnet; and
- c) The Service Provider must have relevant expertise to be deployed to the different Transnet projects.
- d) Performance management.
- e) Integration, cross-referral among service providers e.g., EAP service providers, Occupational health service, medical aids and absence management service providers.
- f) Project Management skills will be expected of all human resources deployed to the Transnet accounts.
- g) Demonstration of quality management processes with all projects but in the generation of reports, statistics, and trend analyses for Transnet.
- h) The mapping of processes in alignment with Transnet standard operating procedures and aligned to other internal functional areas or other Service Providers, to provide seamless services to employees is essential.
- i) Complaints and compliments system, accessible to the Transnet Employee Wellness manager.
- j) The Service Provider must demonstrate a return on investment which will underpin the quarterly review process of the SLA.
- k) Participation in various governance forums would be expected.
- l) Reports on relevant projects will be expected.
- m) Monthly statistical reports, quarterly statistical narrative reports, as well as annual reports are required. The service provider must be able to demonstrate the use of the service, the impact, and provide analytic feedback with recommendations.



- n) Ad-hoc reports may be requested as well as dashboard reporting for various EXCO meetings.
- o) Employee satisfaction surveys will be expected after 6 months of the commencement of the SLA. The satisfaction survey must be immediate and after the service offering, with Transnet having the opportunity to have evidence of satisfaction without divulging participant information.
- p) Electronic health information must be shared utilizing various means including PowerPoint presentations; and
- q) The Account manager must meet with terminals/sites monthly.

## **2.15. Monitoring and evaluation**

2.15.1. Monitoring and evaluation should include the following:

- a) EAP Services must be monitored, and practical recommendations actioned.
- b) Internal functionaries must be supported with the implementation of recommendations.
- c) Reports must be customized according to the business requirements.
- d) Trend analyses and evaluations of programmes are a prerequisite.
- e) The reporting must be configured in such a manner that it can integrate into Transnet business structures and areas.

## **2.16. Organisational Health (Fee for service structure)**

Organisational health should include the following:

- a) Coaching services for managers and executives to assist with new managers and were recommended as part of wellness and team interventions, including providing coaching for abrupt behaviour (coaching for the bully).
- b) Assist managers in terms of coaching or performance.
- c) Team health which includes assessments, recommendations and where required implementation of actual interventions.
- d) Assistance with the Exit Management process i.e., conduct exit interviews and data analysis.



## **2.17. Key behaviours expected within the Transnet environment.**

- 2.17.1 A keen ability to understand business partnering and an ability to engage with various stakeholders. This includes HR, Safety and Risk, Occupational Health and many more.
- 2.17.2. Partnership to work in co-operation with others Service Providers who manage components of the employee wellness function, to maximize in efficiencies. These could be related to disability, absenteeism management, HIV/AIDS, diseases management, amongst others.
- 2.17.3. The Service Provider must become an integral member of the Transnet team by understanding the environment in which they are rendering a service.
- 2.17.4. The dynamics of transversal contract, value managed at a Group level but operationally managed at Operating Division level should also be factored into the Service Provider's planning.
- 2.17.5. An understanding that the current EAP has evolved beyond the basic generic service offering is key to this contract.
- 2.17.6. Timeous corrective actions where required on projects, services and challenges; and
- 2.17.7. An ability to be flexible, adaptable and to manage the function within tight organizationally imposed deadlines.

## **2.18. General**

- 2.18.1. Respondents should note that Transnet requires a one (1) month handover period at no charge, commencing from the date of the award of business (clinical cases agreement between the new and old service provider).
- 2.18.2. Transnet also required in respondents to be able to retain the current Transnet Employee Assistance Program Toll Free number.
- 2.18.3. A system that can easily track a case by surname, SAP/employee number, ID number as the identifier for the clinical team; (POPI, Act.) client consent.
- 2.18.4. Intellectual Property of any new content development remains the property of Transnet.
- 2.18.5. As Transnet pursues more digital platforms for efficiency and in alignment with its 4IR strategy, the contracted service provider needs to demonstrate value added services such as mobile apps, gamification ability amongst others; and
- 2.18.6. The service provider must ensure personal and professional liability insurance for the affiliates who come onto Transnet premises.



## **2.19. Benefits to Transnet**

2.19.1. Transnet must be able to receive reduced cost of acquisition and improved service benefits resulting from the economies of scale.

2.19.2. Transnet must be able to satisfy user needs through the service provider ensuring maximum accessibility to the service through different media.

## **3. GREEN ECONOMY / CARBON FOOTPRINT**

Transnet wishes to have an understanding of your company's position with regard to environmental commitments, including key environmental characteristics such as waste disposal, recycling and energy conservation. *Please submit details of your entity's policies in this regard.*

## **4. GENERAL SERVICE PROVIDER OBLIGATIONS**

4.1 The Service provider(s) shall be fully responsible to Transnet for the acts and omissions of persons directly or indirectly employed by them.

4.2 The Service provider(s) must comply with the requirements stated in this RFP.



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# Submission Guidelines

# PROCUREMENT PROCESS

## Overview

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- The tender was advertised on the National Treasury Portal [www.etenders.gov.za](http://www.etenders.gov.za) and on the Transnet website.
- The RFP closing date and time is on **25 April 2025 at 16:00pm**.
- Late submissions will be disqualified.

- **For Instructions on the RFP submission:**

please refer to **RFP, Section 2 paragraph 3.**

- **For details of all returnable documents that need to accompany your RFP submission:**

please refer to **RFP, Section 3, *Returnable Documents*.**



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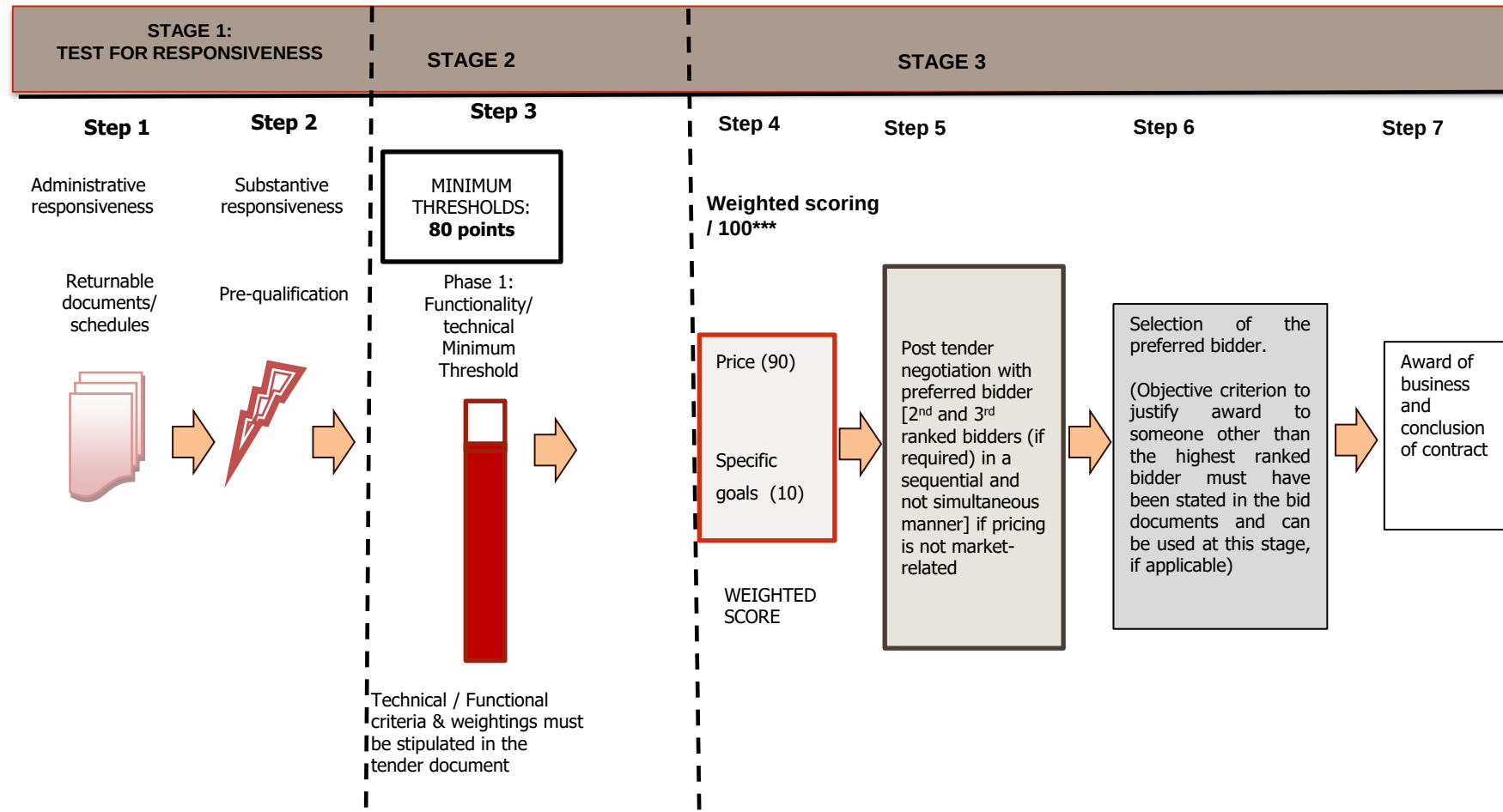


# Eligibility & Evaluation Criteria





### EVALUATION METHODOLOGY





## TEST FOR RESPONSIVENESS

### Step 1: Administrative Responsiveness

- Whether the bid has been lodged on time. (Section 2 Paragraph 3)
- Verify if the bid documents has been duly signed by authorised respondent. (All sections)

### Step 2: Substantive Responsiveness

- Whether the bid contains a priced offer as prescribed in the pricing schedule. (Section 4)
  - Proof of registration with Employee Assistance Professionals Association of South Africa (EAPA-SA) (Annexure H)
- ❖ ***The test for substantive responsiveness [Step Two] must be passed for a Respondent's Proposal to progress to Step Three for further Evaluation.***

# PROCUREMENT PROCESS

## Evaluation Methodology (cont)

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### TECHNICAL:

#### 1.STEP THREE – Minimum Threshold 80 points for Technical Criteria

| Technical Evaluation Criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Reference         | Maximum Points |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|----------------|
| <p><b>Bidder`s Experience in employee wellness programmes</b></p> <p>Bidders must provide signed client reference letters on official client letterhead, demonstrating their experience in running employee wellness programme over the past 5 years. Each reference letter should include the client's name, contact numbers, email address, a description of the work done, and the duration of the contract. The bidder must have done work in a large entity with employees from 10 000 or more employees. The bidder needs to submit 1 to 5 reference letters.</p> <ul style="list-style-type: none"> <li>- No experience with large entity employee wellness programme submitted <b>[0]</b></li> <li>- 1-2 years' experience in a large entity conducting employee wellness programme <b>[5]</b></li> <li>- 3-4 years' experience in a large entity conducting employee wellness programme <b>[10]</b></li> <li>- 5 or more years' experience in a large entity conducting employee wellness programme <b>[15]</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                 | <b>Annexure I</b> | <b>10</b>      |
| <p><b>Key Personnel Previous Experience</b></p> <p>Bidder to provide a CV as per the CV template showing capacity experience of the key resources. Highlighting the experience in employee wellness programme:.</p> <p>Bidder to provide an organogram of the supporting team which will be handling the Transnet account showing the capacity and experience of each team member. Bidders to submit CVs with relevant.</p> <p>Qualifications &amp; Experience</p> <p><b>Key Account Manager [5]</b></p> <ul style="list-style-type: none"> <li>- No experience submitted <b>[0]</b></li> <li>- (1) -(5) years of employee wellness programme experience with relevant NQF 7 qualifications <b>[2]</b></li> <li>- (6) -(8) years of employee wellness programme experience with relevant NQF 7 qualifications <b>[3]</b></li> <li>- 9 or more years of employee wellness programme experience with relevant NQF 7 qualifications <b>[5]</b></li> </ul> <p><b>Case Manager [5]</b></p> <ul style="list-style-type: none"> <li>- No experience submitted <b>[0]</b></li> <li>- (1) -(5) years of employee wellness programme experience with relevant NQF 7 qualifications <b>[2]</b></li> <li>- (6) -(8) years of employee wellness programme experience with relevant NQF 7 qualifications <b>[3]</b></li> <li>- 9 or more years of employee wellness programme experience with relevant NQF 7 qualifications <b>[5]</b></li> </ul> | <b>Annexure J</b> | <b>40</b>      |

## TECHNICAL:

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| <p><b>Specialist Business Intelligence or Data Analyst [5]</b></p> <ul style="list-style-type: none"> <li>- Less than 1 year experience submitted [0]</li> <li>- (1) -(5) years of employee wellness programme experience with relevant NQF 7 qualifications [2]</li> <li>- (6) -(8) years of employee wellness programme experience with relevant NQF 7 qualifications [3]</li> <li>- 9 or more years of employee wellness programme experience with relevant NQF 7 qualifications [5]</li> </ul> <p><b>Organisational Health Specialists [5]</b></p> <ul style="list-style-type: none"> <li>- No experience submitted [0]</li> <li>- (1) -(5) years of employee wellness programme experience with relevant NQF 6 qualifications [2]</li> <li>- (6) -(8) years of employee wellness programme experience with relevant NQF 7 qualifications [3]</li> <li>- 9 or more years of employee wellness programme experience with relevant NQF 7 qualifications [5]</li> </ul> <p><b>Financial Advisor Specialist [5]</b></p> <ul style="list-style-type: none"> <li>- No experience submitted [0]</li> <li>- (1) -(5) years of employee wellness programme experience with relevant NQF 7 qualifications [2]</li> <li>- (6) -(8) years of employee wellness programme experience with relevant NQF 7 qualifications [3]</li> <li>- 9 or more years of employee wellness programme experience with relevant NQF 7 qualifications [5]</li> </ul> <p><b>Legal Advisor Specialist [5]</b></p> <ul style="list-style-type: none"> <li>- No experience submitted [0]</li> <li>- (1) -(5) years of employee wellness programme experience with relevant NQF 7 qualifications [2]</li> <li>- (6) -(8) years of employee wellness programme experience with relevant NQF 7 qualifications [3]</li> <li>- 9 or more years of employee wellness programme experience with relevant NQF 7 qualifications [5]</li> </ul> <p><b>Call Centre Professionals [5]</b></p> <p>Bidder to provide an organogram of the call centre team showing the capacity and experience of each team member:</p> <ul style="list-style-type: none"> <li>- No experience submitted [0]</li> <li>- (1) -(5) years of employee wellness programme experience with relevant NQF 7 qualifications [2]</li> <li>- (6) -(8) years of employee wellness programme experience with relevant NQF 7 qualifications [3]</li> <li>- 9 or more years of employee wellness programme experience with relevant NQF 7 qualifications [5]</li> </ul> | Annexure J | 40 |
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### TECHNICAL:

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| <p><b>Bidder`s Client Reference in debt management, rehabilitation, review, consolidation, mediation &amp; consultation)</b></p> <p><b>Bidder`s Experience in Debt management, rehabilitation, review, consolidation, mediation &amp; consultation</b></p> <p>Bidders must provide signed client reference letters on official client letterhead, demonstrating their experience in running debt management, rehabilitation, review, consolidation, mediation &amp; Consultation over the past 5 years. Each reference letter should include the client's name, contact numbers, email address, a description of the work done, and the duration of the contract. The bidder needs to submit 1 to 5 reference letters.</p> <ul style="list-style-type: none"> <li>- No experience with Debt Management etc. submitted <b>[0]</b></li> <li>- 1-2 years' experience in conducting Debt Management etc. <b>[5]</b></li> <li>- 3-4 years' experience in conducting Debt Management etc. <b>[10]</b></li> <li>- 5 or more years' experience in conducting Debt Management etc. <b>[15]</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <p><b>Annexure K</b></p> | <p><b>10</b></p> |
| <p><b>The Approach/ Methodology</b></p> <p>Bidders must provide a detailed methodology and approach on how the required. services will be provided. The methodology and approach must be aligned to the scope of work (SOW) and requirements detailing the following:</p> <ul style="list-style-type: none"> <li>• <b>Counselling Services (5)</b></li> </ul> <p>Methodology and approach are presented at a high level, with little to no details supplied for the related output of the scope of work <b>[2]</b></p> <p>Submission of the methodology and approach, along with succinct justifications for the related output of the scope of work <b>[3]</b></p> <p>Submission of the methodology and approach, along with specific information for the necessary output on the scope of work <b>[5]</b></p> <ul style="list-style-type: none"> <li>• <b>Health, Wellness &amp; Risk Management (5)</b></li> </ul> <p>Methodology and approach are presented at a high level, with little to no details supplied for the related output of the scope of work <b>[2]</b></p> <p>Submission of the methodology and approach, along with succinct justifications for the related output of the scope of work <b>[3]</b></p> <p>Submission of the methodology and approach, along with specific information for the necessary output on the scope of work <b>[5]</b></p> <ul style="list-style-type: none"> <li>• <b>Organisational Health Services (5)</b></li> </ul> <p>Methodology and approach are presented at a high level, with little to no details supplied for the related output of the scope of work <b>[2]</b></p> <p>Submission of the methodology and approach, along with succinct justifications for the related output of the scope of work <b>[3]</b></p> <p>Submission of the methodology and approach, along with specific information for the necessary output on the scope of work <b>[5]</b></p> | <p><b>Annexure L</b></p> | <p><b>35</b></p> |



### TECHNICAL:

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| <p><b>The Approach/ Methodology Continue....</b></p> <ul style="list-style-type: none"> <li> <b>Awareness, Education &amp; Training (5)</b><br/> Methodology and approach are presented at a high level, with little to no details supplied for the related output of the scope of work [2]<br/> Submission of the methodology and approach, along with succinct justifications for the related output of the scope of work [3]<br/> Submission of the methodology and approach, along with specific information for the necessary output on the scope of work [5] </li> <li> <b>Lifestyle Management (5)</b><br/> Methodology and approach are presented at a high level, with little to no details supplied for the related output of the scope of work [2]<br/> Submission of the methodology and approach, along with succinct justifications for the related output of the scope of work [3]<br/> Submission of the methodology and approach, along with specific information for the necessary output on the scope of work [5] </li> <li> <b>Executive Wellness (5)</b><br/> Methodology and approach are presented at a high level, with little to no details supplied for the related output of the scope of work [2]<br/> Submission of the methodology and approach, along with succinct justifications for the related output of the scope of work [3]<br/> Submission of the methodology and approach, along with specific information for the necessary output on the scope of work [5] </li> <li> <b>Implementation of Advanced Financial management, detailing on how to do debt management, debt review, debt consolidation and debt rehabilitation process (5)</b><br/> Methodology and approach are presented at a high level, with little to no details supplied for the related output of the scope of work [2]<br/> Submission of the methodology and approach, along with succinct justifications for the related output of the scope of work [3]<br/> Submission of the methodology and approach, along with specific information for the necessary output on the scope of work [5] </li> </ul> | <p><b>Annexure L</b></p> | <p><b>35</b></p>  |
| <p><b>Total Weighting:</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                          | <p><b>100</b></p> |
| <p><b>Minimum qualifying score required:</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                          | <p><b>80</b></p>  |



## WEIGHTED SCORING & NEXT STEPS

### Step 4: Price and Specific Goals

- Only bidders who have met step 3 will proceed to this step .
- Points will be allocated as follows:
  - Price (90); and
  - Specific Goals (10)

### Step 5: Post Tender Negotiations ( if applicable)

### Step 6: Objective Criteria ( if applicable)

### Step 7: Award of business and conclusion of contract



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# Q&A SESSION



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Thank you

