



SCM /Tender Ref #:	DWYPD 04 - 2025/26
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Request for proposals for:	OUTSOURCING OF THE EMPLOYEE HEALTH AND WELLNESS PROGRAMME FOR THE DEPARTMENT OF WOMEN, YOUTH AND PERSONS WITH DISABILITIES FOR A PERIOD OF 36 MONTHS
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Bid closing date and time as well as the date and time of briefing session (if any) are indicated on the attached SBD1. Quotations / proposals received after the closing date and time indicated on SBD 1 will not be accepted.

Service Providers must provide 1 original and 5 copies of proposals submitted.

Only 1 original price proposal and SBDs are required.

Estimated project start date:	Expected project duration (Months)
From date of appointment	36

1. BID INFORMATION

Information and guidelines on the format and delivery of bids are contained in the attached bid documents. Please take note of the closing date and date of compulsory briefing session (if any).

2. PROPOSAL FORMAT

A detailed proposal in response to this ToR must be submitted. The proposal should contain all the information required to evaluate the bid against the requirements stipulated in this terms of reference. The following must be attached to the proposal as annexures:

- **Annexure B1:** Proposed team (Must use attached Excel template)
- **Annexure B2:** Summary of past experience of team members (Must use attached Excel template)
- **Annexure B3:** Deliverables and allocation of time to team members (Must use attached Excel template).
- **Annexure B4:** Pricing information. Price proposals must include VAT and should be fully inclusive to deliver the all outputs indicated in the terms of reference (Must use attached Excel template).
- The published terms of reference (this document, including Annexure A to this document).
- All other forms / certificates required (see bid documents).

3. CONDITIONS OF BID

Detailed conditions applicable to all bids are contained in the bid documents accompanying this Terms of Reference. Only suppliers that meet all the requirements stipulated in the terms of reference and bid documents will be considered.

No late bids will be accepted. Only bids from Service Providers that attended the compulsory briefing session (if specified above) will be considered. Bids must be valid for a minimum period of 120 days after the closing date.

ENQUIRIES		
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1. BACKGROUND

Annexure A contains a detailed description of the requirements for this project, including:

- Background / context
- Problem statement / purpose
- Objectives and scope of project
- Proposed methodology / approach
- Deliverables and time frames

2. EXPERIENCE / SKILLS / TEAM COMPOSITION / PAST PERFORMANCE

The attached spreadsheet must be used to summarise qualifications, skills and past experience and to cost the proposal.

2.1. Service Provider and Team composition

2.1.1. Empowerment/ Ownership requirements

The proposed Service Providers must meet the following empowerment requirements and provide proof thereof:

The proposed team must meet the following empowerment requirements:

- **Black PDI%:** At least 30% of the person-days required to complete this project must be allocated to Previously Disadvantaged Individuals (PDIs)¹; or
- **Women%:** At least 40% of the person-days required to complete this project must be allocated to women; or
- **Youth%:** At least 30% of the person-days required to complete this project must be allocated to youth (persons aged 35 or younger); or
- **Persons with Disabilities%:** At least 7% of the person-days required to complete this project must be allocated to Persons with Disabilities; and
- **Empowerment spend:** At least 30% of the fully inclusive resource cost for all deliverables must be allocated to Black PDIs.

Annexure B1 must be completed and the required details of each team member must be provided. Team members indicated in the proposal must be available for the duration of the project and must play a meaningful role in the project. Replacement of team members may only be done in consultation with DWYPD and replacement team members must have the same PDI profile as well as qualifications / experience as those they are replacing.

2.2. Experience, qualification, registration and availability requirements

2.2.1. The Service Provider must establish a multi-disciplinary team that meets the minimum qualification and experience requirements as detailed in the table below (attach evidence), that is able to render a comprehensive Employee Health and Wellness services with prior experience in the public or private sector with organisations

Roles*	Qualification/s and membership	Experience
Project Manager	NQF7 qualification in health-related profession or project management. Registration as a member in good standing with a relevant professional body on either health-related professional body or project management will be an added advantage	Project managed at least 3 employee health and wellness programmes
Social Workers	NQF7 in Social Work. Registered as a member in good standing with the SACSSP	Minimum 3 year's work experience in the indicated sector.
Psychologists	NQF7 in Psychology. Registered as a member in good standing with HPCSA (e.g. Clinical, counselling, education, industrial, research psychologist)	Minimum 3 years relevant experience.

¹ By Black PDIs we mean South African citizens who are Black, Indian, or Coloured.

Roles*	Qualification/s and membership	Experience
Nurses	NQF7 in Nursing. Registered as a member in good standing with SANCA	Minimum 3 years' experience as a registered nurse in general nursing.
Financial Advisors	Appropriate NQF7 qualification. Registered with a relevant professional body will be an added advantage	Minimum 5 years relevant experience.

- One team member may not have more than two roles
- Score will be combined for all experts – All experts must meet minimum criteria stipulated above to receive a score of 3.
- The professionals, as far as possible, must reflect the demographics of South Africa.

2.2.2. The Service Provider shall provide the personnel necessary to provide the services required and service levels specified herein and ensure that all personnel possess or have access to knowledge and sufficient expertise to enable it to provide the required services in accordance with the specification.

2.2.3. The following must be submitted for each of the proposed team members:

- written confirmation of availability (signed by the proposed team member) for the expected duration of the project, and an undertaking to render the services and perform the deliverables outlined herein;
- detailed CV indicating qualifications, previous experience as well as letters of reference (references must be contactable); and
- copy or copies of qualification/s and professional body registration.

2.2.4. The Department reserves the right to verify all qualifications through the South African Qualifications Authority and to verify experience indicated on CVs with third parties.

2.3. Past performance & Contactable references

2.3.1. The Service Provider must provide examples of similar projects completed including value and size of similar nature (**see Annexure B**).

2.3.2. The past performance of Service Providers in executing similar projects will be evaluated using the references supplied by Service Providers as well as any other information available to the panel.

2.3.3. The Department reserves the right to reject a bid if the Service Provider failed to perform satisfactorily on similar projects.

2.4. Proposal

2.4.1. The bid proposal submitted by the Service Provider must include a detailed project plan. As summary of deliverable dates must be included in **Annexure B3**. The proposed plan must also include a close of and hand over process toward the end of the project to ensure successful handover of projects for the purposes of continuity of services.

2.4.2. The start of the project will commence on date of award. The start of the project will depend on the Department's procurement processes. The total duration of the project as indicated in the Service Provider's proposal is binding (except for delays due to circumstance beyond the Service Provider's control).

3. COSTING METHODOLOGY

Prices must be inclusive of VAT (if VAT registered) and must include all costs to fully execute all deliverables indicated in these terms of reference (ToR). No variation in contract price will be permitted. **Annexure B4** must be used to summarise costing.

4. EVALUATION OF BIDS

4.1. Administrative requirements

Annexures B1 to B4 **must** be completed using Microsoft Excel or compatible software. Annexures completed by hand (in writing) will not be accepted and such bids will be regarded as administratively non-compliant.

Only bids / quotes that comply with all administrative requirements and that submitted all required bid documents (acceptable bids) will be considered during the functional evaluation phase. Only acceptable bids / quotes will be scored by the Bid Evaluation Committee against the functional criteria indicated in this Terms of Reference.

4.2. Scoring of bids (functional criteria)

The following weighting and scoring system will be applied to the evaluation of all functional criteria:

Weight allocation	Scoring system
1 – Value adding requirement (minimum score of 2)	1 – Does not comply with the requirements
3 – Important requirement (minimum score of 6 or 9)	2 – Partial compliance with requirements
5 – Essential requirement / integral part of project (minimum score of 15)	3 – Full compliance with requirements
	4 – Exceeds full compliance requirements

Score per criterion: The final score obtained by a Service Provider for each criterion will be calculated by multiplying the weight and the score indicated by each Bid Evaluation Panel member and then by averaging the scores of all panel members. The average score per criterion is expressed as a number.

The **overall score** obtained by a Service Provider (expressed as a percentage) will be calculated as follows:

$$\text{Overall Score (\%)} = \frac{\text{Sum of average scores for all criteria}}{\text{Sum of weights} \times 4} \times 100$$

4.3. Functional evaluation Part 1 – Quantitative criteria

Part 1: Minimum functional requirements: Only bids that scored at least the minimum score for each criterion will proceed to functional evaluation part 2. The department reserves the right to verify the information submitted. The costing and content of proposals may not be amended.

Functional Evaluation Criteria		Weight	Min. Score
1.1	Empowerment requirements (par 2.1.1 of ToR and Annexures B and B1): 1= Proposed team does not meet the empowerment/ownership criteria. 3= Proposed team meets the empowerment/ownership criteria. 4= Proposed team exceeds minimum criteria and exceeds any of empowerment/ownership criteria by 1 or 2 criteria	9	3
1.2.	Project Manager (par 2.2.1) 1= Project manager does not meet the qualification and experience 3= Project manager meets the qualification and experience 4= Project manager exceeds the qualification and experience	9	3
1.3	Social Workers (par 2.2.1) 1= Social workers do not meet the qualification experience and membership in good standing criteria 3= Social workers meet the qualification, experience and membership in good standing criteria. 4= Social workers exceed the qualification, experience and membership in good standing criteria	9	3
1.4	Psychologists (par 2.2.1) 1= Psychologist do not meet the qualification, experience and membership in good standing criteria 3= Psychologists meet the qualification, experience and membership in good standing criteria. 4= Psychologists exceed the qualification, experience and membership in good standing criteria	9	3

Functional Evaluation Criteria		Weight	Min. Score
1.5	Nurses (par 2.2.1) 1= Nurses do not meet the qualification, experience and membership in good standing criteria 3= Nurses meet the qualification, experience and membership in good standing criteria. 4= Nurses exceed the qualification, experience and membership in good standing criteria	9	3
1.6	Financial advisors (par 2.2.1) 1= Financial advisors do not meet the qualification and experience criteria 3= Financial advisors meet the qualification and experience criteria. 4=Financial advisors exceed the qualification and experience criteria and membership in good standing	9	3
1.7	Prior experience in implementing similar projects of Employee Health and Wellness services (paragraph 2.3) 1= Service Provider did not provide at least 3 examples of similar projects completed. 3= Service Provider provided examples of 3 completed projects of a similar nature. 4= Service provider provided examples of more than 3 completed projects of a similar nature with contactable references.	9	3

4.4. Functional evaluation Part 2 – Qualitative criteria

The functional evaluation criteria indicated below will be applied during Part 2 of functional evaluation to all bids that met the minimum requirements stipulated under Functional Evaluation Part 1. During part 2 the Bid Evaluation Committee may:

- Evaluate and score bids based on the bid documents and proposals submitted; or
- Provisionally evaluate and score Service Providers based on proposals submitted and then invite Service Providers that met all requirements under Part 1 and a provisional overall score of at least 60% for both functional evaluation parts 1 and 2, to present their bids.

The final evaluation and scoring of bids will be based on the proposals submitted, as well as on information provided by Service Providers during bid presentations (if applicable). Presentations can be used to summarise and clarify bids and may not substantially depart from the proposals submitted.

If a Service Provider is unable to attend a bid presentation on the date requested by the Bid Evaluation Committee, then the Service Provider must be afforded another opportunity within 5 working days. If a Service Provider is for a second time unable to attend a bid presentation, then the bid must be evaluated based on the bid documents and proposals submitted only.

Part 2: Minimum functional requirements: Only bids that obtained the minimum score for each criterion for both functional evaluation parts 1 and 2, will proceed to Price/PPPFA evaluation.

Functional Evaluation Criteria		Weight	Min. Score
2.1	Understanding the brief: proposal by the Service Provider (paragraph 2.4.1) 1= Did not address the purpose and objectives of the project. 2= Proposal shows minimal understanding of the sector and partially addresses the purpose and objectives of the project. 3= Proposal shows good understanding of the Employee Health and Wellness Strategic Framework for the Public Service and fully addresses the purpose and objectives of the project. 4= Proposal shows exceptional understanding of the Employee Health and Wellness Strategic Framework for the Public Service, the purpose and objectives of the project responded innovatively and proposal offered added value to the project.	15	5

Functional Evaluation Criteria		Weight	Min. Score
2.2	Proposed approach (paragraph 2.4.2) 1= Proposed methodology is not aligned to the purpose, objectives and scope of the project. 2= Proposed methodology is partially aligned to the purpose, objectives and scope. 3= Project methodology is aligned to the purpose, objective and scope of the project. 4= Proposed methodology is innovative and will add value beyond the originally intended purpose, objectives and scope of the project.	15	5
2.3	Evidence of a 24/7/365 toll free call centre facility (par 3.7 of Annexure A) 1= Service Provider does not meet the minimum requirements. 3= Service Provider meets all the minimum requirements. 4= Service Provider exceeds the minimum requirements.	9	3
2.4	Extent to which the costing methodology is realistic given the scope and time frames of the project (Annexure A para 4) 1= Costing of the project is not aligned to the scope and times frames of the project. 2= Costing of the project not entirely aligned to scope and time frames and may negatively impact delivery. 3= The costing methodology is realistic given the scope and time frames of the project. 4= The costing methodology provides innovative solutions to reduce costs associated with the project.	9	3
2.5	Project plan (par 2.4.3) 1= No project plan included in bid. 2= Project plan does not fully address all deliverables or does not indicate completion within the required time frames. 3= Project plan addresses all deliverables and indicates completion of the project within the required time frames. 4= Project plan addresses all deliverables and indicates completion of the project in significantly less than the envisaged time frames.	9	3

4.5. Price and Specific Goals

Only qualifying bids will be evaluated in terms of the Preferential Procurement Policy Framework Act and related regulations – see attached bid documents. The evaluation method (80/20 or 90/10) and preference points allocation applicable to this bid are indicated in the attached SBD 6.1.

5. CONTRACT MANAGEMENT

The successful Service Provider will be required to enter into a service level agreement (SLA) with the Department of Women, Youth and Persons with Disabilities. The National Treasury General Conditions of Contract (GCC) will form part of the SLA to be concluded between DWYPD and the successful Service Provider. A copy of the standard DWYPD SLA is available on the DWYPD tender's website. Service Providers should familiarise themselves with the content of the standard template.

Service Providers should note that:

- All information related to this bid, or information provided to the Service Provider subsequent to the award of this bid, are confidential, and must be treated as such, and may not be disclosed in any way to third parties without the explicit written consent of DWYPD.
- All rights, title and ownership of any Intellectual Property developed by or for the Service Provider or DWYPD independently, and outside of execution/production of the Deliverables related to this bid and provided during the course of this project ("Background IP"), shall remain the sole property of the party providing the Background IP.
- To the extent that the Service Provider utilises any of its Background IP in connection with the Deliverables, such Background IP shall remain the property of the Service Provider and DWYPD shall acquire no right or interest therein, save that, upon payment of the applicable consideration, the Service Provider shall grant DWYPD a non-exclusive, royalty-free, non-transferable licence to use such Background IP strictly for purposes of making beneficial use of the Deliverables into which such Background IP has been incorporated.

- All Intellectual Property rights in Bespoke Deliverables are, or will, be vested in and owned by DWYPD unless specifically agreed otherwise in writing. The Service Provider agrees that it shall not, under any circumstances, question or dispute the rights and ownership of DWYPD in and to the Bespoke Deliverables. DWYPD shall grant the Service Provider a non-exclusive, royalty free, non-transferable licence to use the Bespoke Deliverables for the purpose of performing its obligations under this project.
- The Service Provider may not publish or sell, in whole or in part, any Bespoke Deliverables emanating from this project without the explicit written consent of DWYPD.
- The Copyright of any Bespoke Deliverables shall vest in DWYPD.

6. SPECIAL CONDITIONS APPLICABLE TO THIS BID

- 6.1. Due to the protection of organisational information and confidentiality of personal information, all service practitioners must sign a declaration of confidentiality/oath of secrecy before commencing with any project activities. Where so required by the Department, any practitioner shall be subjected to security vetting.
- 6.2. Monthly and quarterly reports on client usage and organisational health trends with recommendations on interventions to improve the health and wellbeing of employees.