

SCM /Tender Ref #:	DWYPD 02 - 2022/23
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Request for proposals for:	<b>OUTSOURCING OF THE EMPLOYEE HEALTH AND WELLNESS PROGRAMME FOR THE DEPARTMENT OF WOMEN, YOUTH AND PERSONS WITH DISABILITIES FOR A PERIOD OF 36 MONTHS</b>
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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 one original and five (5) copies of proposals submitted.**

**Only one (1) original price proposal and SBDs are required.**

Estimated project start date:	Expected project duration (Months)
01 March 2023	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		
Name:	Andre Coetzee (technical)	Teboho Mokomane (SCM general)
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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:

- **Black owned company:** Company must at least be black owned;
- **Gender:** At least 50% of the person-days (team members) required to complete this project must be allocated to women; and
- **Youth%:** at least 40% of the person-days (team members) required to complete this project must be allocated to youth (persons aged 35 or younger); or
- **Disability%:** at least 10% of the person-days (team members) required to complete this project must be allocated to disability; or
- **Empowerment spend:** at least 30% of the fully inclusive resource cost for all deliverables must be allocated to Black PDIs.
- Service providers who exceed the requirement will receive an advantage.

**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 sector with departments similar in size (160 employees and more).

Roles	Qualifications	Experience
Project Manager	Appropriate qualification. Registered with relevant professional bodies	5 years relevant experience.
Team Leaders	Appropriate qualification. Registered with relevant professional bodies	5 years relevant experience.
Medical Doctors	MBChB or equivalent. Registered as a Medical Practitioner with HPCSA	Minimum 5 years' experience in the related fields.
Social Worker	Degree in Social Worker. Registered with the SACSSP.	Minimum 3 year's work experience in the indicated sector.
Psychologists	Registered with HPCSA (e.g. Clinical, counselling, education, industrial, research psychologist)	Minimum 3 years relevant experience.

<b>Roles</b>	<b>Qualifications</b>	<b>Experience</b>
Lawyers	LLB or equivalent qualification. Admission as an Attorney /Advocate.	Minimum 5 years post qualifications, litigation /advisory experience.
Nurses	Appropriate nursing qualification. Registered with SANCA	Minimum 3 years' experience as a registered nurse in general nursing.
Other , e.g. Financial Advisors	Appropriate qualification. Registered with relevant professional bodies as prescribed	5 years relevant experience.

- *One team member can have more than one of the roles indicated.*
- *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 reflect the demographics*

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
- copies of qualifications 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 at least three (3) contactable references on similar projects completed in the public sector, including value and size of similar nature. **(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. Below satisfactory performance on a particular project may only be considered if such performance was communicated to the Service Provider by the contracting party and the Service Provider was given a reasonable opportunity to correct any deficiencies highlighted by the contracting party. 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 scope of the proposal must be aligned to the Employee Health and Wellness Strategic Framework for the Public Service in four areas such as HIV, STI and TB Management, Health and Productivity Management, SHERQ Management (Safety, Health, Environment, Risk, Quality) and Wellness Management. In terms of management of absenteeism, the Service Provider to align their consultancy services to the provisions of PILIR.

2.4.2. Service Providers must demonstrate how they are going to render the service to the Department, and how the manner of the delivery of their services will meet the intended purpose and objectives of the project. Note that immediate family members are not to be included in the provision of the required services from the Service Provider, except to the extent that their involvement and participation is deemed to be essential in the provision of specific services provided to employees of the Department.

2.4.3. 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.

- 2.4.4. 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).
- 2.4.5. The Department requires that the Service Provider actively participates in the management of the project for the duration of the contract. Both the Department and Service Provider must establish the necessary mechanisms to manage the project, inclusive of the reporting schedules and formats as stipulated by the Department.

### 3. COSTING METHODOLOGY

Prices must be inclusive of VAT (if VAT registered) and must include all costs to fully execute all deliverables indicated in this 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 requirements

**Score per criteria:** The final score obtained by a Service Provider for each criteria 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 criteria 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 criteria will proceed to functional evaluation part 2. In cases where Service Providers submitted insufficient evidence or where evidence is ambiguous, Service Providers may be requested to provide additional evidence and may be re-scored based on this information. Additional information submitted may only be used as evidence to substantiate what is already contained in the proposal. The costing and content of proposals may not be amended.

Functional Evaluation Criteria		Weight	Min. Score
1.1	<b>Empowerment requirements (par 2.1.1 of ToR and Annexures B and B1):</b> 1= Proposed team does not meet the empowerment/ownership criteria. 3= Proposed team meets the empowerment/ownership criteria. 4= Proposed team exceeds any of empowerment/ ownership criteria-	3	9
1.2	<b>Team composition (paragraph 2.2.1)</b> 1= Proposed team not diverse in terms of multi-disciplinary expertise. 3= Proposed team reflects multi-disciplinary expertise. 4= Proposed team exceeds standard multi-disciplinary expertise.	3	9
1.3	<b>Qualifications, experience and registration (paragraph 2.2)</b> 1=The experts do not meet the minimum requirements for experience, qualification and registration, or did not submit verifiable references, or did not submit written confirmation of their availability for the project. 3= The experts meet all the experience, qualification, registration and availability requirements. 4= The experts exceed the minimum experience, qualification and registration requirements.	3	9
1.4	<b>Prior experience in implementing Employee Health and Wellness services in the public sector (paragraph 3.2)</b> 1= Service Provider did not provide at least three (3) contactable references, including value and size of similar nature. 3= Service Provider did provide at least three (3) contactable references, including value and size of similar nature. 4= Past performance in executing similar projects confirmed as satisfactory using the references supplied by Service Providers.	3	9

#### 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 five (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 criteria as well as an overall score of at least 75% for both functional evaluation parts 1 and 2, will proceed to Price/PPFA evaluation.

Functional Evaluation Criteria		Weight	Min. Score
2.1	<b>Understanding the brief: proposal by the Service Provider (paragraph 2.4.1)</b> 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.	5	15
2.2	<b>Proposed approach (paragraph 2.4.2)</b> 1= Proposed methodology is not aligned to the purpose and objectives of the project. 2= Proposed methodology is partially aligned to the purpose and objectives. 3= Project design, sample, data collection tools and analytical framework proposed are logical and practical. 4= Methodology is innovative and will add value beyond the originally intended purpose and objectives of the project.	5	15
2.3	<b>Evidence of a 24/7/365 toll free call centre facility (par 3.7 of Annexure A)</b> 1= Service Provider does not meet the minimum requirements. 3= Service Provider meets all the minimum requirements. 4= Service Provider exceeds the minimum requirements.	3	9
2.4	<b>Extent to which the costing methodology is realistic given the scope and time frames of the project</b> 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.	3	9
2.5	<b>Project plan (par 2.4.3)</b> 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.	3	9
2.6	<b>Project management (paragraph 2.4.5)</b> 1= Service Provider does not propose project management mechanisms. 3= Service Provider proposes mechanisms to effectively manage the project. 4= Service Provider proposes reporting schedules and formats as required.	3	9

#### 4.5. Price / BBBEE / PPPFA

Only bids that meet the minimum administrative and functional requirements / specifications indicated in the ToR (qualifying bids) will be evaluated in terms of the Preferential Procurement 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 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, must be treated as confidential and may not be disclosed in any way to third parties without the explicit written consent of DWYPD.
- All right, 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.