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Education, Training and Development Practices Sector Education and Training Authority

BID NO. SCMU: 05 – 2022/23

REQUEST FOR BIDS

TERMS OF REFERENCE FOR THE EMPLOYEE HEALTH AND WELLNESS PROGRAMME (EHWP) FOR THE ETDP SETA STAFF

1. INTRODUCTION

The Education Training and Development Practices Sector Education and Training Authority (ETDP SETA) is a public entity established in terms of Section 9(1) of the Skills Development Act, No 97 of 1998 to advance skills levels in accordance with the National Skills Development Plan (**NSDP**). The Mandate of the ETDP SETA is to promote and facilitate the development and improvement of the skills profile of the sector's workforce in order to benefit employers, workers, and employees in the ETD sector.

The ETDP SETA will host a **COMPULSORY** virtual briefing session for **BID NO: SCMU 05 - 2022/23 – Employee Health and Wellness Programme (EHWP)** for the ETDP SETA staff on **16 August 2022 at 11h00**. Interested members must please communicate their interest to join in the session, on or before **12 August 2022**. To attend and get access to the session, please email TienieJ@etdpseta.org.za with your Name, Surname, Company Name, Email address, and Cellphone Number. Access details will only be shared with those that confirmed. **Please do not forward the link further.** We thank you for your cooperation.

NB: THE MEETING ROOM FOR THE COMPULSORY BRIEFING SESSION WILL CLOSE AT 11H15

The ETDP SETA reserves the right not to award the BID.

2. PURPOSE OF THE PROJECT

The ETDP SETA is looking for a Service Provider who has experience and capacity to provide an integrated Employee Health and Wellness Programme to assist and support employees with their work-related and or personal problems, with the aim to improve their overall health and wellbeing.

The ideal goal of an Employee Health and Wellness Programme is to improve the health and wellbeing of employees to boost their morale, motivation, and quality of life for better organisational performance.

EHWP is to be used by all the ETDP SETA employees and their immediate family members (as per the provision of the HR policy) who experience psychological, psychiatric, legal, and health problems either at work or at home.

The appointed service provider must be able to offer a wide range of wellness solutions under one umbrella and should be able to offer diagnostic services to direct staff members to the appropriate medical professional/s where necessary.

In addition, the Provider must be able to provide the following:

Employee Assistance Program (EAP): Services including and not limited to Trauma Counselling, Legal, Debt Assistance, Eye screening, TB screening, etc.

Corporate Wellness Days (CWD): Conduct on-site or virtual corporate employee wellness days

Occupational Health and Safety: Online access to workshops, training for OHS Officers, and on-site nursing service should the need arise

Assessments: Multiple Choice Employee Wellness Assessments which allow the employer insight to the wellness of the staff

Workshops: On mental health, stress management, depression, etc.

EWP should have specialists in Clinical Psychology, Industrial Psychology, and Psychiatric with hands-on experience

Counselling services must be available in the employee's language of choice

Proof of experience in delivering a similar service

Provide a minimum of three (3) references on company letterhead

Provide proof of registration with the Health Professionals Council of South Africa (HPCSA) / Employee Assistance Professionals Association of South Africa

BIDDERS SHOULD USE THE COSTING MODULE AND INDICATE THE PRESCRIBED RATES RESPECTIVE FOR EACH ITEM.

The EHWP service provider must provide occupational health specialisations in all the ETDP SETA offices as and when required

The EHWP service is coordinated by Human Resource Department.

3. PROFILE OF THE SERVICE PROVIDER

3.1. PROJECT DELIVERABLES

- 3.2.1 Access to a 24-hour contact centre for the duration of the contract
- 3.2.2 Communication access via SMS and call back service
- 3.2.3 Counselling and consultation (face-to-face and/or telephonic counselling)
- 3.2.4 Trauma management services including on-site management, should the need arise (group or individual)
- 3.2.5 The bidder must have proof of infrastructure /resource capacity and of existence
- 3.2.6 Provision of communication and health promotion information
- 3.2.7 Appropriate referral and managerial services
- 3.2.8 Management and employee orientation
- 3.2.9 Management of consultation services
- 3.2.10 Provision of training on health and wellbeing matters
- 3.2.11 Family care advice and resources
- 3.2.12 Wellness events
- 3.2.13 An occupational therapist to provide occupational health services as and when required

4. SCOPE OF WORK

- 4.1. The EHWP service offering should cover the following services
 - 4.1.1. Consulting Services,
 - 4.1.2. Programme Marketing,
 - 4.1.3. Counselling Services,
 - 4.1.4. Occupational Health Services

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- 4.1.5. Online Wellness- face-to-face, one-on-one mode as well as 24 hours service, and
- 4.1.6. Monitoring, Evaluation, and Reporting

4.2. The EWP service provider shall provide onsite clinic and health services to all ETDP SETA employees for services such as administering of boosters, and vaccines if required.

4.3. The service provider should also be in a position to provide the following to the ETDP SETA employees;

- 4.3.1. Holistic Counselling in the form face to face counselling, telephonic, and virtual therapy/counselling i.e., enabling service users to have a wider choice on how they can access those professional services beyond the traditional access, spiritual counselling, and healing rooted in diverse religions and African traditional belief systems
- 4.3.2. Life Management Services and referrals; and
- 4.3.3. Trauma counselling
- 4.3.4. Screening and testing for occupational health diseases

4.4. DISEASE IMPACT MANAGEMENT

Provide a chronic disease management programme to early identify employees with Chronic Disease of Lifestyle, to help them access medical care that mitigates complications like heart attacks and stroke. The provider should be able to provide the necessary advice on effective chronic disease management. The subsequent medical care will be covered by the employee's medical aid.

4.5. ABSENTEEISM AND INCAPACITY MANAGEMENT

The service provider should assist the ETDP SETA in ascertaining the extent of absenteeism by;

- 4.5.1. identifying key drivers of the identified trends,
- 4.5.2. identifying high-risk areas within the organisation,
- 4.5.3. identifying gaps in the relevant policies and procedures, and
- 4.5.4. craft a comprehensive gap closure strategy that will guide the ETDP SETA to effective absenteeism management.

4.6. In the context of Incapacity due to ill health, injury, incapacity, and disability management, the service provider should provide interventions to improve an affected employee's vocational potential to the extent that the employee remains in their original occupation.

4.7. The provision of the above intervention should be provided along with the following:

- 4.7.1. Readiness in terms of fitness to return to own occupation
- 4.7.2. Functional capacity evaluations
- 4.7.3. Adaptations required to perform own job
- 4.7.4. Labour Law and labour requirements
- 4.7.5. Guidance on reasonable accommodation

4.8. DISABILITY MANAGEMENT

Provides the ETDP SETA with disability management service that is based on a multidisciplinary assessment process with legal, ethical, occupational, financial and administrative components. Informed by an understanding of labour law, risk management, occupational medicine, disease management, and rehabilitation.

5. COSTING MODEL (PRICE SCHEDULE)

COST COMPARISON FOR THE EMPLOYEE HEALTH AND WELLNESS PROGRAMME (EHWP)

Cost will be monitored through monthly reports that will be submitted by the service provider. THE SERVICE PROVIDER WILL BE REQUIRED TO REFLECT WHERE THEY HAVE USED THE PRESCRIBED INDUSTRY RATES.

THIS COSTING MODEL MUST NOT BE MODIFIED AT ALL AND IF RETYPED, ALL LINE ITEMS IN ORDER AS STATED BELOW TO BE INCLUDED.

COSTING FOR THE ETDP SETA AS PER THE REQUIREMENTS	
NAME OF BIDDING ORGANISATION:	
ITEM DESCRIPTION	COST PER HOUR
Absenteeism	
High staff turnover	
Unsatisfactory work performance	
Loss of concentration	
Financial literacy and Debt management	
Lack of motivation and energy	
Anger Management	
Family and household problems	
Bereavement and Loss	
Anxiety and depression	
Stress levels (family, social, work)	
Medical and Health issues (HIV/AIDS, cancer etc)	
Substance abuse and addiction (drugs, alcohol, prescription medication) and other addictive behaviour (e.g., smoking, gambling)	
Non-work-related legal issues	
Discrimination, victimisation, sexual harassment, suicide/homicidal threat	
Threats of violence and Trauma	
Occupational health sicknesses	
Occupational Health Nurse as and when required	
SUB-TOTAL	
VAT @ 15%	
TOTAL COSTS	

.....
Signature of Bidder

NB: ALL THESE COSTS SHOULD INCLUDE ALL PRICE ESCALATIONS!

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6. DURATION OF THE PROJECT

It is expected that the duration of the agreement will be for a period of **three (3) years** after the signing of the Service Level Agreement.

7. EVALUATION CRITERIA

THE ETDP SETA applies the provisions of the **PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000** and **Preferential Procurement Regulations, 2017**. The evaluation will be guided by ETDP SETA procurement policy.

Folder A (USB) must have documents for Stage 1 and Stage 2

7.1. STAGE 1 [(Folder A) USB]

Bidders will be evaluated on the submission of the requested mandatory documents. Fully completed and signed forms with witnesses' signature must be submitted and all applicable boxes be ticked. Failure will lead to disqualification and elimination from further evaluation.

7.1.1. MANDATORY DOCUMENTS TO BE SUBMITTED IN ORDER TO BE ELIGIBLE FOR EVALUATION

1. Declaration of Interest – **SBD 4 (New)**
2. Proof of registration with the Health Professionals Council of South Africa (**HPCSA**)

NB: Failure to complete fully and submit any of the above-requested mandatory documents will lead to disqualification.

7.2. STAGE 2 [(Folder A) USB]

During this stage, the evaluation of bids shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria as set out below.

- (a). The minimum qualifying score for functionality will be **70 points** and bids that fail to achieve the minimum qualifying score will be eliminated.
- (b). Only bids that achieved the minimum qualifying score/ percentage for functionality will be evaluated further in accordance with the **80/20 preference point systems prescribed in Preferential Procurement Regulations 5 and 6**.

The evaluation criteria for functionality will be as below:

NO.	CRITERIA	WEIGHT
1.	<p>Contactable references and Experience (25)</p> <p>1.1. Reference letters indicating that they have been providing Employee Wellness Programme - (bidder to provide signed proof on referee's company letterhead) (15)</p> <ul style="list-style-type: none"> 3 references = 15 2 references = 10 1 reference = 5 <p>1.2. Years of experience in doing a similar Employee Wellness Programme (a detailed company profile must be attached) (10)</p> <ul style="list-style-type: none"> 5 years plus = 10 3 – 4 years = 5 1 – 2 years = 2 <p>Each reference must clearly indicate;</p> <ul style="list-style-type: none"> the name of the bidder and the project objectives of the project (nature of the project) duration of the project recommendation and contact details of the referee as well as projects completed on time and must be signed <p>NB: If any of this information is omitted/missing will lead to the reference letter(s) being disqualified.</p>	25
2.	<p>Detailed communication approach for clients from different backgrounds: 5</p> <p>Experience of working with people from diverse cultural backgrounds = 5 Lack of experience of working with people from diverse cultural backgrounds = 0</p>	5
3.	<p>Composition of the Project Team (attach CVs with the indication of similar experience): 30</p> <p>3.1. Project Manager should be a qualified Health Practitioner/ Industrial Psychology/ Clinical Psychology / Industrial Psychologist and their experience be endorsed by the HPCSA) = 10</p> <ul style="list-style-type: none"> 5 years plus = 10 3 – 4 years = 5 1 – 2 years = 2 <p>3.2. Qualifications= 10</p> <ul style="list-style-type: none"> Relevant Bachelor's degree= 10 National Diploma = 6 Relevant National Certificate= 2 <p>3.3. Experience= 10</p> <ul style="list-style-type: none"> 5 years plus = 10 3 – 4 years = 5 1 – 2 years = 2 <p>NB: SERVICE PROVIDER TO SUBMIT CV(S) OF PROFESSIONALS TO BE USED FOR THIS PROJECT</p>	30

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	NB: Please also note that project personnel will only be changed with the approval of the ETDP SETA	
4.	<p>Bidders should submit a detailed project plan that includes all aspects as indicated in section 4 (Scope of work) = 40</p> <p>4.1 The EHWP service offered</p> <p>4.2 The EHWP service provider shall render a 24-hour telephone contact during the duration of the contract to the ETDP SETA employees</p> <p>4.3 The EHWP service provider shall render electronic wellness services to all employees at all times</p> <p>4.4 The EHWP service provider shall provide onsite clinic and health services to all the ETDP SETA employees, as and when needed</p> <p>4.5 The service provider should also be in a position to provide the services as indicated in section 4.5 to the ETDP SETA employees</p> <p>4.6 Provide chronic disease management programme</p> <p>4.7 The service provider should assist the ETDP SETA in ascertaining the extent of absenteeism</p> <p>4.8 The service provider should provide the ETDP SETA with disability management</p> <ul style="list-style-type: none"> • Meet all of the above-mentioned deliverables out of the plan = 40 points • Does not meet all of the above-mentioned deliverables of the plan = 0 points <p>NB: THE EHWP SERVICE PROVIDER SHALL PROVIDE AND MAINTAIN CONFIDENTIAL RECORDS/DOCUMENTS I.E., MEDICAL TRANSCRIPTS FOR THE SERVICE PERIOD IN COMPLIANCE WITH THE POPI ACT</p>	40
TOTAL		100

Bidders must provide documents to justify awarding the above points, and such proof should include details of contactable references to Evaluation Criteria.

Points will be awarded on a sliding scale.

Please take note of the value and scoring point system of your bid

7.3. STAGE 3 [(Folder B) USB]

PRICING SCHEDULE DOCUMENTS

- Costing Model (**Price must be final, include VAT and signed**)
- Valid Tax Clearance Certificate or "Unique security personal identification number (PIN) issued by SARS and must be on the SARS letterhead"
- Invitation to Bid - **SBD1**
- Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2017 - **SBD 6.1 (If claiming preferential points)**
- B-BEE certificate or sworn affidavit (**If claiming preferential points**)

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80/20 preference point system shall be applicable as follows:

✓ Price	80
✓ B-BBEE status level of contributor	20

In order to facilitate a transparent selection process that allows equal opportunity to all service providers, the ETDP SETA will adhere to its policy on the appointment of service providers.

NB: PLEASE NOTE THAT INCLUSION OF THE FINANCIAL PROPOSAL IN FOLDER A WILL LEAD TO DISQUALIFICATION

8. BID CONDITIONS

The ETDP SETA Supply Chain Management Policy will apply:

1. ETDP SETA does not bind itself to appoint a bidder with the highest points.
2. ETDP SETA reserves the right to negotiate the bidder's price.
3. ETDP SETA reserve the right to cancel the bid and not award the bid to any of the bidders.
4. Bids which are late, incomplete, unsigned or submitted by facsimile and/or email will **NOT** be accepted.
5. Bidders with a **turnover above R 10 million** must submit a valid certified B-BBEE Verification Certificate from **SANAS Accredited Verification Agency** in order to be eligible for empowerment points.
6. An Exempted Micro Enterprise (EME) is only required to submit a sworn affidavit, or a Certificate issued by Companies and Intellectual Property Commission (CIPC) confirming their annual turnover of R 10 million or less and level of black ownership to claim points.
7. A Qualifying Small Enterprise (QSE) is required to submit a sworn affidavit confirming their **annual total revenue of between R 10 million and R 50 million** and **level of black ownership** or a B-BBEE level verification certificate to claim points as prescribed.
8. **B-BBEE Certificates obtained from Accountants/ Auditors after 31 December 2016 will no longer be accepted.**
9. Companies who bid as a joint venture must submit a **consolidated B-BBEE Verification certificate prepared for this bid only**, from **SANAS Accredited Verification Agency** in order to be eligible for empowerment points. Companies who form part of this joint venture **MUST** have an accreditation certificate with relevant authority as stated in Mandatory documents.
10. Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor, sworn affidavit or a B-BBEE Certificate, together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.
11. Bids submitted are to hold good for a period of 90 days.
12. Deregistered and blacklisted companies including directors/owners/individuals linked to the company will not be considered. Due diligence will be conducted with successful bidders to validate submitted information.
13. All suppliers must be registered on the **Central Supplier Database**. No bid will be awarded to any supplier by ETDP SETA that is not registered on the Central Supplier.
14. Companies that are in the process of **de-registration in the CIPC** will not be considered.
15. Service Provider must provide proof of Public Liability Insurance.

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9. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation **must** be downloaded from the ETDP SETA website: www.etdpseta.org.za, Main Menu > Supply Chain Management > Open Tenders as from **12h00** on **08 August 2022**.

Bidders must submit technical and financial proposals in **two separate USBs ONLY** clearly marked “Folder A-Technical Proposal” and “Folder B- Financial Proposal”.

NB: PAPER-BASED PROPOSALS and CDs WILL NOT BE ACCEPTED AND WILL LEAD TO DISQUALIFICATION AND ELIMINATION OF YOUR BID FROM EVALUATION!

Folder B must include the **complete and signed costing model and Valid Tax Clearance Certificate or Unique security personal identification number (PIN) issued by SARS and must be in SARS letterhead” (Mandatory).**

The financial proposal will only be opened when the tender is responsive in Stage 2 or at the discretion of the ETDP SETA.

All Bids/Proposals **must be hand/ courier delivered to:**

The ETDP SETA – Head Office
ETDP SETA House
2-6 New Street
Ghandi Square
Johannesburg South - CBD
2091

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of **11h00 on 31 August 2022**.

No late submission will be accepted!

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00 on 31 August 2022**.

11. ENQUIRIES AND CORRESPONDENCES

NO telephonic or any other form of communication relating to this bid will be permitted with any other ETDPSETA member of staff either by Bidders (as collective bidding team or individual of the bidding team), representative of Bidders, associates of Bidders, shareholders of Bidders, other than with the named individual stated below. **ANY MEANS OF ATTEMPTING TO INFLUENCE THE ADJUDICATION PROCESS OR OUTCOMES OF THE ADJUDICATION PROCESS WILL RESULT IN IMMEDIATE DISQUALIFICATION OF THE ENTIRE BID.** All enquiries regarding this bid must be in writing only and be directed to:

Supply Chain Manager: Email: tenderers@etdpseta.org.za

Note: Blacklisted companies appearing on the National Treasury database and prohibited from conducting business with public entities, will be disqualified.