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Finance and Procurement Department

Supply Chain Management

Request for Bids (RFB)

APPOINTMENT OF SERVICE PROVIDER TO PROVIDE INTEGRATED EMPLOYEE WELLNESS PROGRAMME (EWP) FOR A PERIOD OF THREE (03) YEARS.

Bid Information

Bid Number	RFB 04 -2025/2026
Bid Issued Date	28 November 2025
Bid Submission Date	18 December 2025 @ 11:00 am
Bid Description	APPOINTMENT OF SERVICE PROVIDER TO PROVIDE INTEGRATED EMPLOYEE WELLNESS PROGRAMME (EWP) FOR A PERIOD OF THREE (03) YEARS.
Bid Validity Period from Date of Publication	120 days
Bid Compulsory Briefing Session	N/A
Address for Compulsory Briefing Session	N/A
Bid Contact Person	Sebotse Mokgabudi
Evaluation Method: Points System	80/20
Deadline for Responding to Clarifications for this bid	11 December 2025 @ 11:00 am
Fraud Hotline <i>to report any wrongful or criminal deception or coercion intended to result in financial or personal gain by any SEDFA employee or person involved in this bidding process</i>	0800 724 666 (For anonymous reporting)
For complaints	procurement_complaints@Sedfa.org.za

Small Enterprise Development and Finance Agency (SOC) LTD Registration Number 2024/614733/30

Board Members: Ms N Makanda (Chairperson) • Mr KT Bonakele • Mr W Carrim • Ms X Daku • Ms NP Lubisi • Mr PL Makape • Ms K Mogorosi • Ms C Motale • Mr S Mpakama • Ms DM Ntsika • Mr L Ntuane • Ms H Tsoadi • Mr A Xabadiya

Mr N Mbatha (ACEO) • Ms C Williams (ACFO) • Mr L Makupula (ACIO) • Ms B Ndlovu (Acting Company Secretary)



Special Conditions and Requirement of Contract

APPOINTMENT OF SERVICE PROVIDER TO PROVIDE INTEGRATED EMPLOYEE WELLNESS PROGRAMME (EWP) FOR A PERIOD OF THREE (03) YEARS.

1. INTRODUCTION AND BACKGROUND

- 1.1. As of 01 October 2024, **sefa**, Seda, and the Cooperative Banks Development Agency (CBDA) have officially merged to form Sedfa. The incorporation of Sedfa stems from the signing of the National Small Enterprise Amendment Act 2024 (No. 21 of 2024) by President Cyril Ramaphosa on 23 July 2024, and its subsequent gazetting on 30 September 2024. Sedfa is a development finance institution, listed as a Schedule 3B National Government Business Enterprise, with the State as the sole shareholder and the Department of Small Business Development as the Executive Authority. Sedfa complies with both the Public Finance Management Act 1 of 1999 and the Companies Act 71 of 2008.
- 1.2. As a development finance institution, SEDFA provides both financial and non-financial support to Micro-Small Medium Enterprises (MSMEs) with the objectives to;
 - 1.2.1. Design and implement development support programs for small enterprises,
 - 1.2.2. Promote service delivery network that enhances the contribution of small enterprises to the South African economy,
 - 1.2.3. Foster economic growth, job creation, and equity in historically disadvantaged communities,
 - 1.2.4. Support, promote, and develop cooperative banks and cooperative financial institutions, and
 - 1.2.5. Strengthen the capacity of service providers to support and enable small enterprises to compete successfully both domestically and internationally.

2. THE OBJECTIVES OF THE EMPLOYEE WELLNESS PROGRAMME (EWP)

- 2.1. SEDFA acknowledges that its employees are the organisation's most important asset. Therefore, the employee's health and wellness should always be prioritised to enhance their resilience and performance, enabling the organisation to optimise its strategic goals and objectives.
- 2.2. To demonstrate care and support for the welfare of all employees, SEDFA invests in an Employee Wellness Programme (EWP) to ensure that employees who have health and wellness concerns that may affect their wellbeing, and performance can have access to a wide range of wellness services and thus be encouraged to seek assistance on a voluntary and confidential basis.
- 2.3. This project intends to procure the services of a competent EWP service provider who will become a business partner to SEDFA in offering integrated wellness services.



3. BID SUBMISSION REQUIREMENTS

3.1. Bids must be submitted in a **sealed envelope and marked** as follows:

ATTENTION: SEDFA SUPPLY CHAIN MANAGEMENT

Description of the Bid
Bid Number
Name of the Bidder

3.2. GENERAL BID REQUIREMENTS

- a. Bid documents **must** be initialled on every page.
- b. Number of sealed envelopes/files must compose of one (1) **ORIGINAL** and one (1) electronic PDF **copy** of the original bid proposal document on a memory stick or flash drive.
- c. The bid proposal should be written in English including the certificates.
- d. Submissions of the Bid responses MUST be made by depositing the Bid proposal into the Tender Box situated at SEDFA Head Office at the physical address below on or before the closing date as stated on page 1 of this Request for Bid document under Bid Information.
- e. The bidder will bear all expenses associated with the preparation and submission of this Bid.

3.3. SEDFA PHYSICAL ADDRESS

11 Byls Bridge Boulevard,
Doringkloof,
Centurion,
0157

For more information, please visit the **Sedfa** websites: www.Sedfa.org.za.

3.4. BID RESPONSES

3.4.1. BID FORMAT

3.4.2. Bidders shall submit their bid response in accordance with the requirements as outlined in the Bid Response Template provided in Appendix 1.

3.4.3. Each section must be clearly marked, and the documents must be bound.

3.4.4. The RFB comprises several sections and the bidder's proposal must include all the required information and documentation as outlined in this RFB.

3.4.5. GENERAL CONDITIONS OF CONTRACT

3.4.5.1. Completion of all Standard Bidding Documents (SBD by hand, attached in **ANNEXURES A**, and adhering to all other requirements as outlined on each form. The following SBD and other forms must be duly completed and signed, and returned as part of the Bid Proposal:

- a. **SBD 1:** Invitation to Bid.
- b. **SBD 4:** Declaration of Interest.



- c. **SBD 6.1:** Preference Points Claim Form.
 - d. Valid Tax Compliant Status (TCS PIN issued by SARS).
 - e. In bids where Consortium, Joint Ventures and Sub-Contractors are involved, it is required that each party must submit separate proof of Tax Clearance Certificate(s) or *PIN* issued by SARS.
 - f. Submission of a copy of a **valid B-BBEE certificate** issued through a SANAS Accredited Agency, except for Exempted Micro Enterprises (EMEs) and Qualifying Small Enterprises (QSEs). These enterprises need to submit B-BBEE **sworn affidavits** as per the requirements of the Department of Trade, Industry and Competition (the **dtic**) for qualifying enterprises except those who fall under the Construction Sector Charter Council (CSCC). Other sworn affidavits will not be accepted. The **dtic** and CSCC affidavit templates are available under **ANNEXURE B**.
 - g. National Treasury **Central Supplier Database** (CSD) **registration** (The bidder to attach a proof of registration).
 - h. Submission of bidder's **Companies & Intellectual Property Commission** (CIPC) **registration documents**, listing all Directors or Shareholders and certified copies of the Identify Documents (ID) of Directors or Shareholders (not older than three months).
 - i. Consent Form.
- 3.4.5.2. The successful bidder and its staff shall comply with all the laws of the Republic of South Africa and as it relates to this bid.
- 3.4.5.3. The bidder's staff must be South African citizens and SEDFA reserves the right to validate citizenship.
- 3.4.6. **PRICE PROPOSAL**
- a. Bidders are required to complete and sign pricing proposals.
 - b. **NB:** Failure to complete and submit a pricing proposal, will lead to disqualification of the bid.
- 3.5. **LATE BIDS**
- Bids submitted at the stated bid address, after the closing date & time, shall not be considered under any circumstances.
- 3.6. **COUNTER CONDITIONS**
- Bidder's attention is drawn to the fact that amendments to any of the bid conditions or setting of counter conditions by the bidder shall render the bid invalid.
- 3.7. **BID DISTRIBUTION**
- 3.7.1. The distribution of this RFB outside the Republic of South Africa may be restricted or prohibited by the laws of other countries. Recipients of this RFB are advised to familiarize themselves with and comply with all such restrictions or prohibitions applicable in those jurisdictions, and neither SEDFA, nor any of their respective directors, officers, employees, agents, representatives, or advisors, accepts liability to any person or company for any damages arising out of or in connection with the breach of any restriction or provision outside the



Republic of South Africa. People contemplating submitting a Bid are advised to obtain legal advice as to the possible consequences thereof in terms of the law of the jurisdictions in which they are located.

- 3.7.2. Recipients of this RFB document may only distribute it to other parties whom they wish to involve as part of their bidder consortium in submitting a bid.

3.8. **PRESENTATIONS**

SEDFA reserves the right to request that any bidder provides a formal presentation of its bid proposal at a date and time to be determined by SEDFA. All instructions and clarification regarding the purpose and scope of the presentation/demonstration shall be provided by SEDFA. The bidder shall bear all expenses associated with the preparation of such presentations/demonstrations.

3.9. **EVALUATION PROCESS**

This bid will be evaluated in four (04) stages as follows:

Stage 1 - Administrative Compliance Requirements (Initial Screening Process)

Stage 2 - Mandatory Requirements

Stage 3 - Functionality Criteria

Stage 4 - Price and Preference (Specific Goals).

3.9.1. **STAGE 1: ADMINISTRATIVE SCM COMPLIANCE**

During this stage, bid responses will be reviewed for purposes of assessing compliance with the RFB requirements including the General Conditions of Contract as outlined in this RFB, stated Special Conditions of Contract - **ANNEXURE A.**

3.9.2. **STAGE 2 - FUNCTIONALITY EVALUATION**

- a. All bids will be evaluated independently by the evaluation panel members in terms of the defined evaluation criteria for functionality evaluation.
- b. Bids that score less than **70 points out of 100** on functionality shall not be considered further.
- c. Bids will be evaluated on Functional requirements as outlined in **ANNEXURE B.**

3.9.3. **STAGE 3: EVALUATION OF PROPOSAL ON APPLICABLE POINTS SYSTEM**

- 3.9.3.1. Only bidders that have scored a minimum of **70/100** on functionality will be evaluated during stage 4 for pricing and specific goals/ preference points.
- 3.9.3.2. In terms of Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000) and the amended regulations, responsive bids will be adjudicated by the State on the applicable point system.



3.9.3.3. The applicable preference point system for this tender is the 80/20 preference point system.

3.9.3.4. In terms of 80/20 points system, points are awarded to bidders based on:

CRITERIA	POINTS
Price	80
Specific Goals	20
TOTAL	100 POINTS

4. POST AWARD CONDITIONS

- 4.1. Services will be rendered as detailed/ stated in the Scope of Work / Terms of Reference.
- 4.2. The successful bidder shall submit a monthly statement of all outstanding payments, credit notes issued, and payments made. Such statements shall also contain the order number, the details of the date of the transaction, the invoice number, remittance number and credit note details.
- 4.3. SEDFA shall not be held responsible in any way for any damage, losses, theft of equipment or any valuables of the successful bidder or injury of his/her employees whilst on site or in the execution of their duties.
- 4.4. All procurement related to this service, as outlined in this RFB, shall be conducted by SEDFA's Supply Chain Management department only.
- 4.5. **Compliance to all regulatory requirements until duration of the contract.**

5. STAFF REQUIREMENTS

- 5.1. The successful bidder must ensure the following:
 - a. That the staff working under this contract are in good health.
 - b. That they are adequately trained prior to commencement of the contract.
 - c. That replacement staff is available should the need arise. The bidder is obligated to inform SEDFA of any removal and replacement and the replacement of staff can only be done with the formal approval of SEDFA.
 - d. Staff must be dressed appropriately and where required.
 - e. The bidder's staff must be South African citizens and SEDFA reserves the right to validate citizenship.

6. RESOURCE REQUIREMENTS

The successful bidder must provide the necessary work tools to the bidder's employees working on the project.

7. SERVICE LEVEL AGREEMENT

- 7.1. The successful bidder will be required to enter into a Service Level Agreement with SEDFA.



- 7.2. A performance measurement process will form an integral part of the Service Level Agreement, to be signed after the successful bidder has been appointed.

8. SUPPLIER DUE DILIGENCE

- 8.1. SEDFA reserves the right to conduct bidder due diligence to short-listed bidders prior to final award or at any time during the contract period. This may include site visits if applicable.
- 8.2. SEDFA reserves the right to request the successful bidder and its staff to undergo a security vetting and/or credit vetting processes via external services providers such as Credit Bureaus and the South African Police Services. By submitting a bid proposal, the bidder gives explicit approval for SEDFA to conduct such vetting requirements, when required.

9. BID CANCELLATION

In the case of the cancellation of this RFB, SEDFA shall endeavour to inform all bidders, through the same medium used for the communication of the RFB.

10. MATERIAL CHANGES

- 10.1. Any material changes in the control and/or composition of any bidder or any core member of a bidder after submission of a Bid, shall require the prior written approval of SEDFA, and any failure to seek such approval from SEDFA shall result in SEDFA being entitled, in its sole discretion, to exclude the relevant bidder from any further participation in the bid process or to cancel the engagement. This shall be interpreted to include post appointments and subcontracting of work arising out of this bid to complete certain work.
- 10.2. SEDFA shall be the sole arbiter as to what constitutes a “material change in the control and/or composition of any bidder”, and as to what constitutes a “core member of a bidder” for purposes of such approval. Any request for such approval shall be made to SEDFA’s Supply Chain Management in writing and shall provide sufficient reasons and information to allow SEDFA to make such a decision. SEDFA reserves the right to accept or reject any such request for approval.

11. FRAUD ALERT

- 10.1. SEDFA takes a zero-tolerance approach to fraud, corruption and bribery.
- 10.2. SEDFA is committed to acting fairly, with integrity, in all its’ relationships and business dealings both internally and externally (with its suppliers, contractors and other stakeholders).
- 10.3. Please note that under no circumstances will SEDFA ever require any payment to secure an award of an RFP or a tender. Individuals that claim that an upfront payment to an individual, third party or a SEDFA official, is a blatant attempt at defrauding bidders and such a scam must immediately be reported to the SEDFA Anti-Corruption line. SEDFA follows a fair, competitive and transparent procurement process in evaluating and awarding bids.



- 10.4. Should you or anyone wish to report any suspected fraud, corruption or bribery, you can BLOW the whistle by calling a free hotline on **0800 724 666**.

12. COMMUNICATION

- 12.1. SEDFA may communicate with bidders where clarity is sought after the closing date of the bid and prior to the award of the contract, or to extend the validity period of the bid, if necessary. Such communications will be done via the Supply Chain officials listed as the contact people for this bid process.
- 12.2. All communication (enquiries/clarifications) relating to this bid shall take place between the bidder and the Supply Chain Management officials listed as the contact people for this bid process. Such communication shall be done in writing only.
- 12.3. Communication between the closing date and the award of the bid, between the bidder and other SEDFA officials or persons acting in an advisory capacity for the State, in respect of this bid, is prohibited.

13. CONTACT DETAILS

- 13.1. Main Contact
Name : Sebotse Mokgabudi
Email : smokgabudi@sedfa.org.za
Tel : 012 748 9725

NB: Communication outside this platform is **strictly prohibited** and should bidders be found to be in contact with any of SEDFA's staff members on matters relating to this bid, such bidders shall automatically be disqualified from this bid process.

14. SCOPE OF WORK / TERMS OF REFERENCE

The Scope of Work / Term of Reference is attached as **ANNEXURE E**.

15. ANNEXURES

Annexure A: Stage 1 - Administrative Compliance Requirements

Annexure B: Stage 2 - Functionality Criteria

Annexure C: Stage 3 - Price and Preference







Annexure D: Scope of Work / Terms of Reference

Appendix 1: Bid Proposal Template



ANNEXURE A

STAGE 1 - ADMINISTRATIVE COMPLIANCE REQUIREMENTS

Document Name	Template
National Treasury. Government Procurement: General Conditions of Contract, July 2010	 NT General Conditions of Contr
SBD 1	 SCM-Bid documents SBD 1 - RFB 04-2025-
SBD 6.1	 SBD 6.1 IN TERMS OF PPR2022-Revised
SBD 4	 Standard Bidding Document (SDB) 4_A
GCC	 GCC
CONSENT FORM	 Sedfa POPIA Consent Form 2025.pdf



STAGE 1 - ADMINISTRATIVE COMPLIANCE

- a) The Standard Bid Document (SBD 4 & 6.1) forms must be fully completed and signed by the authorized company representative.
The bidder must submit proof of registration on CSD (Central Supplier Database) in the form of CSD Report.
- b) Submission of valid Tax Compliance Status (TCS) Certificate with a unique security personal, Identification (PIN) issued by the South African Revenue Services certifying that the taxes of the bidder are in the order must be submitted at the closing date and time of the RFQ.
- (d) The bidder must submit a certified valid B-BBEE certificate; in the event of submission of a B-BBEE Sworn Affidavit, the bidder must ensure that the Affidavit is stamped by the Commissioner of Oath and indicate the ownership percentages and specific goals of the Bidding entity;
- (e) The bidder must submit Companies & Intellectual Property Commission (CIPC) company registration documents listing all Directors or Shareholders and certified ID copies for directors/shareholders/members/partners.

Note:

- If the bidder is listed on the National Treasury List of Restricted Suppliers, it will result in disqualification of the bid
- If any of its Directors are Listed on the Register of Defaulters, it shall result in disqualification of the bid.
- If the status of the bidder is reflected deregistered on CIPC and or CSD shall result in disqualification of the bid.

Note: All bidders who do not comply with the items listed above will be disqualified and not be evaluated further.



ANNEXURE B

STAGE 2 - MANDATORY REQUIREMENTS

The bidders must comply with all mandatory requirements to qualify for stage three, i.e. functionality requirements.

NO	MANDATORY REQUIREMENT	COMPLY/ NOT COMPLY
1.	PROFESSIONAL BODY <ul style="list-style-type: none"> The bidder must be a member of the Employees Assistance Professionals Association of South Africa (EAPA-SA). Please attach proof of original, valid certified certificate (not older than three (03) months). 	
2.	A DETAILED COMPREHENSIVE COMPANY PROPOSAL WITH THE FOLLOWING: <ul style="list-style-type: none"> Management Structure; Ownership and years of service of the company (minimum five years in operation); Services offered by the company, the bidder must have provided services at the corporate level to companies of a similar size to SEDFA. A dedicated SEDFA toll-free helpline number (available 24/7/365). 	
3.	REGIONAL REACH <ul style="list-style-type: none"> The bidder must have a physical call centre located in South Africa. The bidder must attach one or more of the below listed documents as proof of physical address of the call centre and the documents must be valid at the time of submission. <ul style="list-style-type: none"> Valid Lease Agreement or the municipal account/utility bill not older than 3 months in the bidder's or director's name. Where the documentary proof does not clearly match the identity of the bidder (or owner/director of the company), the bidder may submit an explanation on an affidavit for consideration by SEDFA at the closing of this RFB. <p>You may want to consider the following to assist with address information</p>	



NO	MANDATORY REQUIREMENT	COMPLY/ NOT COMPLY
	<ul style="list-style-type: none">- Company Registration document (CIPC) outlines the address; and- Title Deed; <p>Note: The SEDFA reserves the right to verify / seek clarity on the submitted proof of address.</p>	

Bidder (s) who failed to comply with the above Mandatory requirements will not be considered for further evaluation.



ANNEXURE C

STAGE 3 - FUNCTIONALITY CRITERIA

ONLY BIDDERS WHO SCORED A MINIMUM OF 70 POINTS ON FUNCTIONALITY REQUIREMENTS WILL BE FURTHER EVALUATED ON PRICE AND SPECIFIC GOAL.

FUNCTIONALITY REQUIREMENTS	SCORING MATRIX	POINTS
1. COMPANY EXPERIENCE <ul style="list-style-type: none"> The bidder must submit a detailed comprehensive company profile demonstrating experience and expertise in conducting corporate integrated Employees Wellness Programmes (EWP) for both public, private sector organisations and DFIs institution with minimum of five years. 	a) 1-4 years' experience and understanding of a similar project = 3 points b) 5 years experience and understanding of a similar project = 5 points. c) 6 and above years' experience and understanding of a similar project = 10 points.	10
2. REFERENCE LETTES <ul style="list-style-type: none"> The bidder must submit five or more signed contactable references of similar projects/service (EWP) in the last five years. Signed contactable reference letters must be on the client company's letterhead and should contain the following information; <ul style="list-style-type: none"> - Description of services rendered; - Duration of contract; - Number of employees; and - Contact person and details. <p>NB: Purchase Orders and Appointment Letters will not be considered/accepted.</p> <p>SEDFA reserves the right to verify the reference letter submitted prior to appointment.</p>	a) Non submission of reference letter = 0 points. b) Submission of 1-4 relevant reference letters = 5 points. c) Submission of 5 relevant reference = 10 points. d) Submission of 6 or more relevant reference letters = 15 points.	15
3. ACCOUNT MANAGER EXPERIENCE <ul style="list-style-type: none"> The bidder must propose a Key Accounts Manager that will be responsible for the SEDFA account. The Key Accounts Manager must have a minimum of five (5) years' experience in managing EWP projects. 	1. Less than five years' experience in similar project = 0 point. 2. Five years' experience in similar projects and relevant qualifications = 10 points.	20



FUNCTIONALITY REQUIREMENTS	SCORING MATRIX	POINTS
<ul style="list-style-type: none"> The bidder must submit a detailed CV highlighting experience in conducting Employee Wellness activities, including qualifications and proof of current individual valid EAPA-SA registration. The proposed Key Accounts Manager's experience must be in the format (dd/mm/yyyy) The CV should highlight completed handled projects in the past. 	<p>e) More than five years' experience in similar projects and relevant qualifications = 20 points.</p>	
<p>QUALIFICATIONS AND SKILLS OF KEY TECHNICAL TEAM/PERSONNEL</p> <ul style="list-style-type: none"> The bidders should propose a minimum of four key personnel to be assigned on the project and they must have a minimum of three years' experience, with relevant qualifications (degree) and skills in Call Center Management, Data Analysis, Marketing and Report Writing. <p>The bidder must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> The structure and composition of the proposed team, clearly outlining the main disciplines/specialities of this project and the key personnel responsible for each speciality. CVs of the key personnel must clearly highlight qualifications, professional body registrations, areas of experience/competence relevant to the tasks and objectives of this project as outlined above. The key team will be responsible for compiling the statistical reports. The CVs must show qualifications in data or statistical analysis and interpretation, with a minimum of three (3) years of experience in report writing. 	<p>a) Less than one (1) year experience including relevant qualifications = 5 points.</p> <p>b) 1-2 years' experience including relevant qualifications = 10 points.</p> <p>c) 3 years' experience including relevant qualifications = 15 points.</p> <p>d) 4-5 years' experience including relevant qualifications = 20 points.</p> <p>e) 6 and above years' of experience including relevant qualifications = 25 points.</p>	25



FUNCTIONALITY REQUIREMENTS	SCORING MATRIX	POINTS
<p>AFFILIATES & QUALIFICATIONS</p> <ul style="list-style-type: none"> The bidder must provide proof of their Affiliates/Associates/Network complement across the nine (9) provinces. Qualified clinical/counselling psychologists, registered counsellors and social workers should be in all areas where employees and family members can easily access the sessions at the affiliate's practice rooms that are close to their place of residence or work. The bidder must be able to offer services in the 12 official languages, including South African sign language (where required). 	<p>a) Affiliates/Associates/networks in one province and up to two languages = 0 points.</p> <p>b) Affiliates/Associates/networks in 1-3 provinces and up to three languages = 10 points.</p> <p>c) Affiliates/Associates/networks in 4-6 provinces and up to seven languages = 15 points.</p> <p>d) Affiliates/Associates/networks in 7-8 provinces and up to 10 languages = 20 points.</p> <p>e) Affiliates/Associates/networks in 9 provinces and up to 12 languages = 25 points.</p>	<p>20</p>
<p>IMPLEMENTATION PLAN, METHODOLOGY APPROACH AND TIMEFRAMES</p> <ul style="list-style-type: none"> The bidder must demonstrate a detailed methodology/approach to be used to carry out the scope of work outlined in Annexure E. The bidder must provide a detailed proposal that outlines its internal processes and methodology in delivering the requirements as per the scope of work. <p>The proposal must include the following:</p> <ul style="list-style-type: none"> - Call centre and Clinical Services procedures. - Proactive and Preventative Wellness Interventions procedures. - Incapacity and Absenteeism Management Methodology. - Account Management and Reporting, including data management system. 	<p>a) Proposed implementation plan submitted and does not correlate with the required scope of work = 0 points.</p> <p>b) Partial implementation plan correlates with the scope of work = 5 points.</p> <p>c) The proposed implementation plan correlates with the scope of work. All-important activities are indicated in the activities schedule, and their timing and sequence are appropriate and consistent with the project objectives = 7 points.</p> <p>d) The proposed implementation plan/methodology specifically tailored to address all scope of work requirement and is sufficiently flexible to accommodate changes that may occur during execution. The work plan fits the scope of work requirements, all important activities indicate and their sequencing is appropriate and</p>	<p>10</p>



FUNCTIONALITY REQUIREMENTS	SCORING MATRIX	POINTS
	consistent with project requirement = 10 points.	
TOTAL FUNCTIONALITY		100

Bidders are required to obtain a minimum threshold of 70 out of 100 points on functionality in order to be evaluated further. Any bidder who scored less than 70 Points will be eliminated and not be evaluated further.



ANNEXURE D

STAGE 3: EVALUATION OF PROPOSAL ON APPLICABLE POINTS SYSTEM

1. Only bidders that have scored a minimum of **70 / 100** on functionality will be evaluated during stage 4 for pricing and specific goals.
2. In terms of Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000) and the amended regulations, responsive bids will be adjudicated by the State on the applicable point system.
 - a. The applicable preference point system for this tender is the 80/20 preference point system.
 - b. In terms of 80/20 points system, points are awarded to bidders based on:

CRITERIA	POINTS
Price	80
Specific Goals	20
TOTAL	100 POINTS

Specific Goals for this tender and points that may be claimed are indicated per table below:

(Note to Tenderers: The tenderer must indicate how they claim points for each preference point system. Failure of the tenderer to submit the fully completed SBD 6.1 with the points claimed and supported by proof/documentation will result in points being forfeited)

Specific Goals Allocated and Points to claimed in terms of this tender		
Indicate the following to support this claim. Failure to provide the required information will result in being forfeited.		
Indicate Number of Full Time Employed Paid Employees:	_____	
Total Annual Turnover or Revenue:	R_____	
Size of Enterprise	Number of points allocated (80/20 system)	Number of points claimed (80/20 system)



		(To be completed by the tenderer)																
Micro Enterprise	8																	
Small Enterprise	5.6																	
Medium Enterprise	3.2																	
Large Enterprise	0.8																	
Sworn Affidavit/ BBBEE Certificate (Ownership aligned to B-BBEE Status Level)	2																	
<table><tr><td>L1</td><td>L2</td><td>L3</td><td>L4</td><td>L5</td><td>L6</td><td>L7</td><td>L8</td></tr><tr><td>2</td><td>1.75</td><td>1.50</td><td>1.25</td><td>1</td><td>0.75</td><td>0.25</td><td>0</td></tr></table>	L1	L2	L3	L4	L5	L6	L7	L8	2	1.75	1.50	1.25	1	0.75	0.25	0		
L1	L2	L3	L4	L5	L6	L7	L8											
2	1.75	1.50	1.25	1	0.75	0.25	0											
Black Women Owned (more/≥30% owned)	4																	
Target Group: Youth	2																	
Spatial: Rural	4																	
Spatial: Townships	2.4																	
Spatial: City	0.8																	

Supporting Document for Claiming of Specific Goals:

The bidder must also indicate point claims on SBD 6.1.

Size of Enterprise: Micro, Small, Medium enterprises: maximum 8/20

Verification Method: National Small Enterprise thresholds for defining enterprise size classes by sector and CSD

B-BBEE (Black Ownership): Maximum 2/20 points.

Verification Method: BBBEE certificate and or Sworn Affidavit:

Youth = 2/20 points which will be allocated follows:

Verification Method: CIPC and or CSD

Spatial: Rural and Township and City-based enterprises: 4/20 points

- Rural = maximum 4 points
- Township= 2.4
- City= 0.8

Verification method: Copy of Utility Bill, Lease Agreement, Title Deed, letter from Municipality outlining the physical address of the company and official letter with stamp from the local councilor.

A maximum of 80 points is allocated for price on the following basis:



80/20

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

The points scored by a bidder in respect of Specific Goals will be added to the points scored for price.

Only bidders who have completed and signed the declaration part of the Specific Goal form and who have submitted the relevant supporting documents will be allocated points.

The points scored will be rounded off to the nearest 2 decimals.

Criteria for breaking deadlock in scoring

- a) If two or more tenderers score an equal total number of points, the contract will be awarded to the tenderer that scored the highest points for Specific Goals.
- b) If two or more tenderers score equal total points in all respects, the award will be decided by the drawing of lots.
- c) A contract may, on reasonable and justifiable grounds, be awarded to a tender that did not score the highest number of points.
- d) Sedfa reserves the right to enter into negotiations with the preferred bidder.
- e) Sedfa reserves the right to provide policy relating to the handling of information (Protection of Personal Information Act).



ANNEXURE E

SCOPE OF WORK / TERMS OF REFERENCE

APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE INTEGRATED EMPLOYEE WELLNESS PROGRAMME (EWP) FOR PERIOD OF THREE (03) YEARS.

1. SCOPE OF WORK

- 1.1 The bidder must be able to render the following integrated health and wellness services for a period of three (03) years:
 - 1.1.1 Telephone Counselling Services – (24/7/365) in 11 South African official languages;
 - 1.1.2 Provide EWP services access via SMS, email, WhatsApp, and a USSD call-back service via a dedicated SEDFA helpline number (and any other safe and reliable communication method);
 - 1.1.3 Face-to-face counselling services - up to six (6) sessions per person per incident/case (including immediate family members and dependents);
 - 1.1.4 South African Sign Language (SASL) may be required for virtual and face-to-face sessions; and
 - 1.1.5 A mobile application (App) for employees to access information and services.
- 1.2 Life management services, including but not limited to the following:
 - 1.2.1 Legal advice (excluding legal services);
 - 1.2.2 Financial wellness consultation and advice;
 - 1.2.3 Family matters advice/counselling (incl. but not limited to parenting; adoption, divorce, teenage pregnancies, bereavement, and loss, etc);
 - 1.2.4 Relationship matters;
 - 1.2.5 Stress management advice/counselling;
 - 1.2.6 Change management counselling and support; and
 - 1.2.7 Substance misuse/substance use disorder/addiction (e.g. alcohol, drugs, gambling, etc.).
- 1.3 Management Consultation/Managerial Consultancy.
- 1.4 Critical Incident Response Service (CISD, incl. but not limited to traumatic events, robbery, hijacking, death of loved ones, etc.) with 12 sessions per annum covered at no additional cost.
- 1.5 Trauma and Bereavement group counselling services (including on-site debriefing, should the need arise).
- 1.6 24/7/365 Call Centre infrastructure (call centre with a dedicated number).
- 1.7 Provide a national network of multi-disciplinary professionals (e.g. registered social workers, psychologists, occupational therapists, financial advisors/consultants, doctors, professional nurses, dietitians/nutritionists, health advisors/promoters, legal advisors, optometrists, etc.).
- 1.8 Reporting system (monthly, quarterly, and annual reports).
- 1.9 Communication: Develop a customised and relevant Employee Wellness Marketing Strategy.



- 1.10 HIV & AIDS counselling, education, and support services.
- 1.11 EWP orientation/induction sessions for managers and employees.
- 1.12 Quarterly talks and training on identified topics/key problems experienced by employees.
- 1.13 General health and medical advice (telephonic).
- 1.14 Chronic disease management (telephonic advice and support).
- 1.15 Career/work-related matters (excluding labour and ER-related issues); and
- 1.16 Absenteeism and Incapacity Management/consultancy (analysis, reporting and telephonic support).

2. COMMUNICATION AND REPORTING

2.1. CONFIDENTIALITY:

- 2.1.1 The bidder shall always maintain confidentiality. No one at SEDFA should have access to personal information regarding any employee or dependent without the employee's written consent.

2.2 THE BIDDER SHALL PRESENT REPORTS AS FOLLOWS:

- 2.2.1 Monthly service utilisation statistics are to be submitted by the 5th of each month;
- 2.2.2 Quarterly performance and utilisation-based reports at the end of each period (April -June; July - September; October to Dec, and January to March) and by the 5th of the following month; and
- 2.2.3 Annual statistics and trends analysis with recommendations.

2.3 GENERAL REQUIREMENTS

- 2.3.1 A 24/7/365 days Call Centre infrastructure with a dedicated SEDFA toll-free number and agents with the capacity to communicate in all eleven (11) South African official languages;
- 2.3.2 South African Sign Language (SASL) may be required for virtual and face-to-face sessions; and
- 2.3.3 Dedicated and capable Call Centre Manager.

3. PROJECT DELIVERABLES

- 3.1. Compile and submit monthly, quarterly & annual reports, which should include the following:
 - 3.1.1. A brief description of services rendered;
 - 3.1.2. Number of employees reached, gender, and provincial representation breakdown;
 - 3.1.3. Challenges experienced during service delivery;
 - 3.1.4. Successes;
 - 3.1.5. Observations/analysis; and
 - 3.1.6. Recommendations.



4. ABSENTEEISM AND INCAPACITY MANAGEMENT

The bidder must provide the following services related to absenteeism and incapacity cases:

- 4.1 Comprehensive management of absenteeism and incapacity cases, including case identification, evaluation, and reporting;
- 4.2 Providing employer recommendations for ongoing case management;
- 4.3 Assisting with disability applications for insurers and implementing graded return-to-work programmes;
- 4.4 Reporting, analysing, and interpreting data on incapacity and disability to identify trends and risk factors;
- 4.5 Offering comprehensive absenteeism reporting to identify potential incapacity cases early;
- 4.6 Representing SEDFA on incapacity panels in a risk advisory capacity;
- 4.7 Developing strategies, reviewing policies, and aligning them to mitigate the business impact and cost drivers of absence, incapacity, and disability in the workplace;
- 4.8 Verifying sick notes in compliance with relevant professional councils and boards in South Africa, such as HPCSA;
- 4.9 Providing support services to relevant stakeholders in various functional areas, including insurers, injury on duty (IOD) services, and occupational health services;
- 4.10 Offering consulting, advisory, and support services to client stakeholders, such as Human Capital, Employee Relations, Wellness practitioners, Management, Supervisors, and Line Management. This support can be at either an organisational level, addressing trends and drivers, or at an individual incapacity case level;
- 4.11 Implementing targeted strategies and interventions for absenteeism, incapacity, and disability management to drive behavioural change within the workplace and optimize policies and practices where suboptimal practices exist; and
- 4.12 Integrating the above strategies and interventions with services provided by internal and external stakeholders to ensure a holistic approach to managing factors driving absenteeism, incapacity, and disability within the organization, thus enhancing the efficiency of service delivery across all functional areas.
- 4.13 The current total headcount of SEDFA employees is **1200**, as illustrated in the table below, and this excludes family and household members:

Province	Number of Employees
Eastern Cape	84
Free State	70
Gauteng	592
KwaZulu Natal	92
Limpopo	77
Mpumalanga	65
Northwest	70
Northern Cape	60



Province	Number of Employees
Western Cape	90
Grand Total	1200

Note*

1. This is the headcount number as of 31 July 2025.
2. This headcount number may vary from month to month due to, e.g. attrition and recruitment or new placements/appointments.

5 TIME FRAMES

- 5.1 A period of 03 (three) years from signing the contract by all parties.

6 INFORMATION REQUIRED IN THE PROPOSAL

- 6.1. Company profile;
- 6.2. Proof of relevant national multi-disciplinary professionals in all the provinces;
- 6.3. Proof of affiliation with the Employee Assistance Professionals Association of South Africa (EAPA-SA);
- 6.4. Previous experience in conducting EWP projects with traceable references with contact details;
- 6.5. Detailed cost breakdown; and
- 6.6. Project Plan for the implementation of services to SEDFA.

7 BID PROPOSAL FORMAT

All bidders must return their proposals categorized and indexed under the following sections:

8 SECTION 1: LEGISLATIVE REQUIREMENTS

The bidders must supply the required documentation as outlined in this Request for Bid document as outlined in item 3.4.5.

9 SECTION 2: MANDATORY & FUNCTIONALITY REQUIREMENTS

The bidder must provide the information set out in the mandatory and functionality requirements stated in the bid document.

10 SECTION 3: COMPANY EXPERIENCE & REFERENCES

The bidder must attach a copy of the comprehensive company's profile, clearly outlining the number of years in Employees Wellness Programme with a clear indication of experience in the industry.

The bidder must complete Table (a) outlining the experience, previous and current reference. Reference letters provided under this section should be the same as individual letters provided on Annexure C on Functionality Requirements.



11 SECTION 4: PROJECT IMPLEMENTATION PLAN

The bidder must submit a detailed project implementation plan that outlines the steps required.

12 SECTION 5: PRICING PROPOSAL/SCHEDULE

Bidders are required to submit price proposal based on the following:

- Monthly Retainer/Fee for service;
- Escalation percentage for year two (02) and three (03);
- All prices should be inclusive of taxes, disbursements, etc and;
- Bidders must indicate any other charges, if any.

13 SECTION 6: ADDITIONAL INFORMATION

Any additional information pertinent to the proposal can be attached under this Section.

An electronic editable copy of the Bid Proposal Template will be available on the SEDFA website: <http://www.SEDFA.org.za/publications/tenders>



APPENDIX 1

BID PROPOSAL COVER PAGE

APPOINTMENT OF SERVICE PROVIDER TO PROVIDE INTEGRATED EMPLOYEE WELLNESS PROGRAMME (EWP) FOR PERIOD OF THREE (03) YEARS.

Bid Number	
MAAA Number	
Company name	
CSD Number	
Contact Person	
Telephone Number	
e-mail address	



SECTION 1: LEGISLATIVE REQUIREMENTS

Attach all required documentation behind this section.

SECTION 2: MANDATORY & FUNCTIONALITY REQUIREMENTS

The bidder must provide the information set out in the mandatory and functionality requirements stated in the bid document.

SECTION 3: SECTION 2: COMPANY PROFILE EXPERIENCE & REFERENCE LETTERS

Note to the Bidder: The bidder must complete the information set out below in response to the requirements stated in the bid document. If the bidder requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with this Returnable Schedule.

Table (a): The bidders must provide the following information:

NB: Reference letters provided under this section should be the same as provided on Annexure C-Functionality Requirements.

Client' Name	Transaction Description	Transaction Value	Project period		Description of service performed and extent of Bidder's responsibilities	Name, title, and telephone contact of client
			Start Date	End Date		



SECTION 4: PROJECT IMPLEMENTATION PLAN

The bidder must submit a detailed project implementation plan that outlines the steps required.

SECTION 5: SECTION 5: PRICING PROPOSAL

Bidders are required to submit price proposal based on the following:

- Monthly Retainer/Fee for service;
- Escalation percentage for year two (02) and three (03);
- All prices should be inclusive of taxes, disbursements, etc; and
- Bidders must indicate any other charges, if any.

ADDITIONAL INFORMATION

Any additional information that is considered pertinent to the proposal can be attached under this section.