



MUNICIPAL INFRASTRUCTURE
SUPPORT AGENT

Today, Creating a Better Tomorrow

Letaba House, Riverside Office Park, 1303 Heuwel Avenue, Centurion, 0046, Private Bag X105, Centurion, 0046, Tel: 012-848-5300

MUNICIPAL INFRASTRUCTURE SUPPORT AGENT (MISA)

REFERENCE NO: MISA/HR/EHWM/003/2025/26

**APPOINTMENT OF A BIDDER TO PROVIDE EMPLOYEE HEALTH AND WELLNESS
MANAGEMENT SERVICES AT MUNICIPAL INFRASTRUCTURE SUPPORT AGENT (MISA)**

September 2025

Beneficiary	Municipal Infrastructure Support Agent
Contact Person	Ms Elma Dineo Kau: 012 848 5325 or Elma.kau@misa.gov.za
Postal Address	1303 Heuwel Avenue, Riverside Office Park, Letaba House, Centurion 0046
Project Name	Appointment of a bidder to provide Employee Health and Wellness Management Services for the Municipal Infrastructure Support Agent (MISA).
Reference No.	MISA/HR/EHWM/003/2025/26
Briefing Session Date	Compulsory : 19 September 2025 @ 10h00
Validity Period	90 days
Closing Date and time	30 September 2025

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1. INVITATION

- 1.1 The Municipal Infrastructure Support Agent (**MISA**) intends to provide Employee Health and Wellness Management Services for the Municipal Infrastructure Support Agent (MISA).

2. DURATION

- 2.1 The bidder is required to provide this service over a period of thirty-six (36) months. MISA may extend the duration at its discretion if necessary.

3. BACKGROUND

- 3.1 The Municipal Infrastructure Support Agent (MISA) is a government component in terms of section 7(5)(c) of the Public Service Act, 1994 (promulgated under Proclamation No. 103 of 1994). It has been established under the executive authority of the Minister for Cooperative Governance and Traditional Affairs, with the Department of Cooperative Governance (DCoG) as its principal department. Accordingly, MISA operates within the department's broader legislative and policy mandates.

3.2 . MISA's objectives are:

- To support municipalities to effectively undertake Comprehensive Infrastructure Planning.
- To support municipalities to procure and develop their infrastructure effectively and efficiently.
- To support the management of (infrastructure) operations and ensure a proper maintenance programme for municipal infrastructure.
- To provide specialized technical and management support to municipalities to ensure accelerated delivery of municipal infrastructure and service provision.
- To develop and coordinate the strengthening of technical capacity in municipalities and within the sector as well as facilitate increased access to funding; and
- To monitor the efficiency, effectiveness and impact of infrastructure projects and support initiatives.

- 3.3. MISA is in the process of implementing an integrated health and wellness programme in line with the National Mental Health Policy Framework and Strategic Plan (2013 -2020), as proposed by the South African Government, to uphold and monitor wellness within the organization, for the promotion, prevention, and treatment of Mental Health Disorders.

4. OBJECTIVES

- 4.1 MISA does not have, in its staff establishment, the capacity to undertake the employee health and wellness internally and thus requires the services of a reputable Employee Health and Wellness Service Provider to assist therein, this includes 450 permanent employees (including Young Graduates/Interns and experiential learners).

- 4.2 The successful bidder is expected to make available at least four (4) resources to be accessible to MISA employees virtually and/or face-to-face as and when required for the duration of services. The resources must be registered counsellors and have the skill and capacity to provide the required services.

- 4.3 The integrated wellness programme should address and monitor the following key areas: -

- a) **Prevention of Harm** which requires support employee health and psychological wellbeing through the prevention of harm and identification of potential hazards.
- b) **Promotion of Health** to optimize health and psychological wellbeing, by encouraging a culture of wellness, inclusive of mind, body, and spirit.
- c) **Resolution of Occurrences or Harm** to support employee health and psychological wellbeing through the respectful resolution of occurrences or taking corrective action against potential harm.
- d) **Organizational Culture** to promote a work environment of psychological wellbeing by monitoring employee engagement and perception of the workplace.

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- e) **Sustainability & Continual Improvement** to assesses the work environment on a continual basis to improve employees' psychological wellbeing.

4.4 Proposed fees with detailed cost breakdown must be quoted for the different levels of resources to be made available clearly stating rates of each team member.

5. SCOPE OF WORK

The successful bidder is expected to provide Employee Health and Wellness programmes aligned to the DPSA Employee Health and Wellness Strategic Framework to alleviate and assist in eliminating workplace and workforce problems by providing supportive, diagnostic, referral, and counselling treatment services to MISA employees covering the following areas: These services include:

SERVICES	TYPE OF SERVICE
5.1 Face-to-face x 7 and telephone counselling (unlimited).	24/7 access to services by employees
5.2 referral for psychological symptoms or mental health disorders (e.g., depression, stress, anxiety).	referrals as per the cases identified
5.3 marital or family-related issues.	counselling sessions
5.4 legal and financial problems.	Counselling sessions 2x workshop/ information session p.a.
5.5 catastrophic medical problems (e.g., AIDS, Cancer, COVID-19, Substance Abuse).	counselling sessions
5.6 pre-retirement planning needs.	annual session for qualifying employees
5.7 career-related difficulties.	assessments conducted for employees
5.8 organisational effectiveness and development programmes.	assessments relating to effectiveness and development programmes conducted per employee category
5.9 management skills on Emotional Intelligence (EQ)	workshops conducted for management (4 interventions per annum)
5.10 nurse on-site for employee wellness check-up including tests for glucose, cholesterol, BMI, Blood pressure, etc.	Conducted on a quarterly basis

6. PROJECT OUTPUT AND OUTCOMES

- 6.1 The service provider will be expected to provide the following to the satisfaction of MISA:
- Physical Wellness (Individual) – promotion of physical activity, good nutrition, healthy sleeping, management of substance abuse and awareness and wellness education
 - Psycho-social Wellness (Individual) – stress management, substance abuse management, economic/ financial stress management and counselling services.
 - Organisational Wellness – management of workplace interpersonal relations (bullying), change management and
 - Work Life Balance – introduction of flexible policies, retirement programme, financial and legal services/ sessions and mainstreaming of gender, disability, and youth into wellness programme.
- 6.2 The Service Provider will be expected to produce detailed monthly reports detailing how each service category has been utilised as per the set MISA service standards including recommendations on where MISA management needs to intervene.
- 6.3 A record of engagements with MISA staff and stakeholders.
- 6.4 Further, it is expected that all data, information, reports, and any other documents required by MISA management relating to services rendered will be made available by the Service Provider at any point in time subject to prior proper arrangement.
- 6.5 The bidders will outsource other professional services that are not psychology related with relevant

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service providers, for example financial and legal sessions that will be conducted for employees.

- 6.6 The resources made available by the service provider must be able to travel to all sites where MISA offers support throughout the country. All cost related to travelling and accommodation will be the expense of MISA. Kilometres claimed will be paid at prevailing government rates. All travel must be prior approved by MISA.

7. PROJECT MANAGEMENT

The MISA Project Manager is the Director: Human Resource Management & Development.

8. TECHNICAL PROPOSAL

Bidders must be able to provide detailed project plans/ proposal and be able to demonstrate programmes they have developed in relations to all aspects as mentioned above.

- 8.1 A company profile that highlights experience in providing employee wellness services.
- 8.2 At least three client reference letters of similar projects undertaken by the company in a medium to large complex organisation, preferably public sector.
- 8.3 Team leader/ Case Manager's curriculum vitae showing experience in Employee Health and Wellness and Counselling services, as well as copies of a tertiary qualification in the field of Clinical Psychology and Counselling or related equivalent tertiary qualifications and professional registration with the HPCSA.
- 8.4 Curriculum vitae of three (3) additional resources with relevant experience in Counselling, Employee Health, and wellness services, as well as copies of a tertiary qualification in the field of Psychology and Counselling or related equivalent tertiary qualifications and professional registration with the HPCSA.
- 8.5 Management team members (Executive Manager/ Key Accounts Manager and Finance Manager) with minimum 3 years' qualifications in their respective fields and minimum 3 years' experience of managing projects, accounting services and finance respectively and must demonstrate adequate experience through the number, types and geographical spread of projects/assignments undertaken. Detailed CVs that clearly indicate experience and qualifications of all team members must be included in the proposal.
- 8.6 The bidder must provide verifiable evidence of its ability to provide EAP service with company registration with (EAPA). Database of registered relevant professionals registered with professional bodies and with certificate of good standing.

9. FINANCIAL PROPOSAL

- 9.1 Complete the pricing schedule in SBD 3.3 attached below
- 9.2 The pricing schedule must include all costs involved including but not limited to, costs for specialists, logistical costs and the bidder must indicate discount price and any special conditions attached to the discount and price offer where applicable.



10. EVALUATION CRITERIA

Bids are invited based on submission of proposal and will be evaluated in three stages, namely pre-qualification, functionality, price and Specific goals .

NB: Bidders (as well as each member of JV or consortium or partnership agreement) must submit proof of registration with the National Treasury's centralised supplier database Bidders must ensure that they are registered on the CSD before bid closing date and before they submit bid proposals.

10.1 STAGE 1 –MANDATORY DOCUMENTS

No.	Item/description	Yes/No
10.1.1	Pricing Schedule (SBD 3.3)	
10.1.2	Declaration of Interest (SBD 4)	
10.1.3	The Service Provider must be registered as a service provider on the Central Supplier Database (CSD). If you are not registered proceed to complete the registration of your company prior to submitting your proposal. Visit https://secure.csd.gov.za to obtain your vendor number. Submit proof of registration.	
10.1.4	In case of a Joint Venture, a written agreement between the parties which must Clearly set out the roles and responsibilities of each member and include a resolution of each company of the Joint Venture together with a resolution by its directors authorising a member of the Joint Venture to sign the documents on behalf of the Joint Venture.	
10.1.5	The Service Provider must be registered with Employee Assistance Professional Association South Africa (EAPA-SA), (attach valid EAPA-SA certificate for the company)	
10.1.6	At least one of the Directors and the two resources must be registered with professional body (e.g., Health Professional Council of South Africa (HPCSA), South African Council of Social Service Profession (SACSSP), (attach valid proof of registration).	
10.1.7	Database of relevant professionals, registered with professional bodies (HPCSA or SACSSP) and are in good standing.	

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10.2 STAGE 2 - FUNCTIONALITY EVALUATION

10.2.1 The following criteria and weights will be applied when bids are evaluated on functionality:

	REQUIRED COMPETENCIES	POINTS
1.	Company Experience: A minimum of five (5) years' experience is required in providing EHWP services with minimum three (3) projects handled supported by reference letters from contactable and verifiable references on the company's letterhead. Experience: Less than 5 years = 0 5 years = 5 Above 6 years = 10 Projects: Less than 3 projects = 0 Between 3 and 5 projects = 5 More than 5 projects = 10	20
2.	Team Leader/ Case Manager Qualification Degree / Honours Degree / Post Graduate Diploma / master's degree in clinical and counselling psychology and proof of registration with HPCSA <ul style="list-style-type: none"> • Degree / B- Tech = 1 points • Honours Degree = 3 points • Master's degree and above = 5 points 	5
	Experience No. of years' experience in field of Clinical and/or Counselling Psychology as mental health wellness specialist at supervisory level: <ul style="list-style-type: none"> Less than 5 years = 0 points 5 years = 2 points 6 years but less than 10 years = 5 points 10 years but less than 15 years = 7 points 15 years and above = 10 points 	10
3.	Resource 1 (Professional) Qualifications Degree / Honours Degree / Postgraduate Diploma/ master's degree in clinical and counselling psychology and proof of registration with HPCSA Degree and proof of registration with HPCSA = 1 points Hons Degree/ Postgraduate Diploma and proof of registration with HPCSA = 3 points Master's Degree and proof of registration with HPCSA = 5 points	5
	Experience No. of years' experience in field of Clinical and/or Counselling Psychology as Mental Health Wellness Specialists: <ul style="list-style-type: none"> Less than 5years = 0 points 5 years = 3 points 6 years but less than 10 years = 5 points 10 years but less than 15 years = 7 points 15 years and above = 10 points 	10
4.	Resource 2 (Professional) Qualifications	5

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	<p>Degree / Honours Degree / Postgraduate Diploma/ master's degree in clinical and counselling psychology and proof of registration with HPCSA</p> <p>Degree and proof of registration with HPCSA = 1 points Hons Degree/ Postgraduate Diploma and proof of registration with HPCSA = 3 points Master's Degree and proof of registration with HPCSA = 5 points</p>	
	<p>Experience No. of years' experience in field of Clinical and/or Counselling Psychology as Mental Health Wellness Specialists:</p> <p>Less than 5years = 0 points 5 years = 3 points 6 years but less than 10 years = 5 points 10 years but less than 15 years = 7 points 15 years and above = 10 points</p>	10
5.	Resource 3 (Professional)	
	<p>Qualifications Degree / Honours Degree / Postgraduate Diploma/ master's degree in clinical and counselling psychology and proof of registration with HPCSA</p> <p>Degree and proof of registration with HPCSA = 1 points Hons Degree/ Postgraduate Diploma and proof of registration with HPCSA = 3 points Master's Degree and proof of registration with HPCSA = 5 points</p>	5
	<p>Experience No. of years' experience in field of Clinical and/or Counselling Psychology as Mental Health Wellness Specialists:</p> <p>Less than 5years = 0 points 5 years = 3 points 6 years but less than 10 years = 5 points 10 years but less than 15 years = 7 points 15 years and above = 10 points</p>	10
6.	<p>Project Plan/ Proposal: The project plan/ proposal should cover aspects as listed in paragraph 4.3 and 6.1 above as well as the DPSA Employee Health and Wellness Strategic Framework.</p> <ul style="list-style-type: none"> • Psychological and Emotional Wellness = 3points • Physical Wellness = 3 points • HIV/AIDS Management = 3 points • Drug and alcohol management = 3 points • Work-life Balance = 2points • Reporting = 3 points • Organisational effectiveness and development programmes = 3 points 	20
	TOTAL =	100

Service providers need to score a minimum of **70 points** on functionality to go through to price and specific goals

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10.3 STAGE 3 - PRICE AND SPECIFIC GOALS

The specific goals allocated points in terms of this bid	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the bidder)	Evidence
Who are women (51% or more)	10		Full CSD report
Who has disability (51% or more owned)	5		Full CSD report
B-BBEE status level contributors from level 1 to 2 which are QSE or EME	5		Valid certificate/ sworn affidavit Consolidated BEE certificate in cases of Joint Venture Full CSD Report)
Total scored points	20		

11. MISA'S RIGHTS

- 11.1 MISA reserves the right to cancel this bid in whole or in part, at its sole discretion, at any time before the Agreement is fully executed.
- 11.2 This Bid does not commit MISA to award an Agreement, to pay any costs incurred by bidders in the preparation of their proposals submitted in response to this Bid, or to procure or contract for services.
- 11.3 MISA reserves the right to conduct vetting and verify the validity of all certificates submitted by bidders.
- 11.4 MISA will reject any proposal as non-responsive that does not provide evidence of the specified mandatory requirements. MISA may or may not request additional information and clarification during the evaluation process from any or all bidders regarding their proposals
- 11.5 MISA reserves the right to request the company's latest audited financial statement to ascertain financial stability of the bidder prior to the award of the bid.

12. REPORTING

- 12.1. The appointed bidder will report to the appointed Project Manager of MISA. The detailed reporting requirements will be provided to the successful bidder during the contract negotiation and project inception.
- 12.2. The bidder must submit a written report to the MISA Project Manager on EHWP services rendered and challenges and solutions relating to provision of employee health and wellness programme services.

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13. PAYMENTS

- 13.1. MISA does not pay any amount in advance. Only original signed invoices must be submitted for payments. The bidder will be paid within **30** days after receipt of valid invoice, when the services have been fully rendered to the satisfaction of MISA, and this done by means of electronic transfer directly into the bidder's bank account.

14. BRIEFING SESSION (COMPULSORY)

- 14.1. Bidders are invited to attend a compulsory briefing session that will be held at MISA Head Office, 1303 Heuwel Avenue, Centurion, Riverside Office Park, Letaba House, First floor, at 10H00, on **19 September 2025 @10H00**. Attendance of the briefing session is compulsory.

15. SUBMISSION OF PROPOSALS

- 15.1. The Tender Documents will be made available on www.misa.gov.za and will be uploaded on the e-Tender Portal. The Tender Documents are not for sale and will also not be emailed to bidders. The Tender Documents **must** also include a soft copy (Memory Stick - all in PDF Format) of the proposal, and to reach MISA offices before **11:00 on the 30 September 2025** and must be enclosed in a sealed envelope clearly inscribed on the outside:

BID REFERENCE NUMBER: MISA/HR/EHWM/003/2025/26

CLOSING DATE AND TIME: 30 September 2025 @ 11:00

- 15.2. Tender documents are to be submitted to MISA Reception and deposited in the tender box at MISA Offices, Letaba House, 1303 Heuwel Road, Riverside Office Park, Centurion, 0046.
- 15.3. No late submissions will be considered under any circumstances.

16. PERIOD FOR ACCEPTANCE OF PROPOSALS

- 16.1. To allow for adequate evaluation, MISA requires a response to this bid to be valid and irrevocable for 90 days after closing date and time.

17. COMMUNICATION WITH MISA OFFICIALS

- 17.1. Bidders and their representatives may not communicate with MISA officials except in writing. Bidders and their representatives must communicate in the manner set forth in this Bid. There shall be no communication with MISA officials except as may be reasonably necessary to carry out the procedures specified in this Bid. Nothing herein prohibits bidders and their representatives from making oral statements or presentations in public to one or more MISA officials during a public meeting.

18. CONFIDENTIALITY

- 18.1. All responses to this Bid become property of MISA and submissions after closing of bid may be subject to public inspection and disclosure in accordance with the MISA SCM Policy and provisions of applicable legislation.

19. QUESTIONS AND REQUESTS FOR CLARIFICATIONS

- 19.1. Bidders must carefully examine the bid documents and in the event of doubt of anything contained in the documents. All enquiries should be made at the briefing session and can also be made in writing five (5) working days before the closing date of the Bid. For queries, please contact the following person:

Ms. Dineo Kau on E-mail: Elma.kau@misa.gov.za



SBD 1

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	MISA/HR/EHWM/003/2025/26	CLOSING DATE:	30 September 2025	CLOSING TIME:	11:00
DESCRIPTION	POINTMENT OF A BIDDER TO PROVIDE EMPLOYEE HEALTH AND WELLNESS MANAGEMENT SERVICES AT MUNICIPAL INFRASTRUCTURE SUPPORT AGENT (MISA)				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
MISA Offices, Letaba House, 1303 Heuwel Road, Riverside Office Park, Centurion, 0046					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms. Dineo Kau		CONTACT PERSON		
TELEPHONE NUMBER	012 848 5325		TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	Elma.kau@misa.gov.za		E-MAIL ADDRESS		
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

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PART B TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED-(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

(Proof of authority must be submitted e.g. company resolution)

DATE:

.....



PRICING SCHEDULE

NAME OF BIDDER:	BID NO.:
CLOSING TIME 11:00	CLOSING DATE :.....

OFFER TO BE VALID FOR ...90 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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1. The accompanying information must be used for the formulation of proposals.
2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.
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3. RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

NB: The rates calculated to include CPI related rates.

	Quantity	Rate Yr1	Rate Yr2	Rate Yr3	Total Price
7x face-to-face with employee and/or immediate family members	Rate per hour/ session				
Telephone (unlimited) with employee and/or immediate family members/ per employee	Rate per hour/ session				
Referral for psychological assistance per incident/per employee	Referral fee/ per employee/ per assistance				
Legal and financial workshops x2	Rate per workshop per annum				
Catastrophic specialist counselling services (HIV/Aids, Dread Diseases, Substance abuse)	Rate per hour/ session				
Pre-retirement planning session for qualifying employee	Rate per hour/ employee/ session				
Career-related difficulties - assessments conducted for employees	Rate per hour/ employee/ session				
Organisational effectiveness and development programmes	Rate of assessments conducted per				

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	employee category				
Management training workshops conducted for management (4 interventions per annum)	Rate per workshop				
Retainer fee for services	Rate per employees/per month				
Reporting indicating employee usage of services	Rate per report (monthly reports)				
Total disbursements					
VAT					
GRAND TOTAL					

SIGNATURE OF THE BIDDER

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SBD 4

SERVICE PROVIDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the Service Provider to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Service Provider's declaration.

- 2.1 Is the Service Provider, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise,

employed by the state?

YES/NO

- 2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

- 2.2 Do you, or any person connected with the Service Provider, have a relationship with any person who is employed by the procuring institution? **YES/NO**

- 2.2.1 If so, furnish particulars:

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

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2.3 Does the Service Provider or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?**YES/NO**

2.3.1 If so, furnish particulars:

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The Service Provider has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.5 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.6 The terms of the accompanying bid have not been, and will not be, disclosed by the Service Provider, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.7 There have been no consultations, communications, agreements or arrangements made by the Service Provider with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the Service Provider was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.8 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.



of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of Service Provider

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SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

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

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total Points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other



method envisaged in legislation;

- (b) “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “**tender for income-generating contracts**” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “**the Act**” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. **FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES**

3.1. **POINTS AWARDED FOR PRICE**

3.1.1 **THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS**

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10	
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

3.2. **FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT**

3.2.1. **POINTS AWARDED FOR PRICE**

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10	
$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$	or	$Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$	

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmax = Price of highest acceptable tender

4. **POINTS AWARDED FOR SPECIFIC GOALS**

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this



tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this bid	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the bidder)
Who are women (51% or more)	10	
Who has disability (51% or more owned)	5	
B-BBEE status level contributors from level 1 to 2 which are QSE or EME	5	
Total scored points	20	

the specific goals may include—

- contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender or disability.
- Implementing the programmes of the Reconstruction and Development Programme as published in Government Gazette No. 16085 dated 23 November 1994.

Means of Verification (Specific Goals)

Procurement Requirement	Required Proof Documents
Women	Full CSD Report
Disability	Full CSD Report
B-BBEE status level contributors from level 1 to 2 which are QSE or EME	Valid certificate/ sworn affidavit Consolidated BEE certificate in cases of Joint Venture Full CSD Report
Failure on the part of a tenderer to submit proof of documentation required in terms of this tender to claim for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed	

Jim

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

Partnership/Joint Venture / Consortium

One-person business/sole propriety

Close corporation

Public Company

Personal Liability Company

(Pty) Limited

Non-Profit Company

State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

- (a) disqualify the person from the tendering process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

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