

## PART A INVITATION TO BID

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (INDEPENDENT DEVELOPMENT TRUST (IDT))</b>					
BID NUMBER:	BID NUMBER: <b>IDT/HREW-01/2023-2026</b>	CLOSING DATE:	14 July 2023	CLOSING TIME:	12:00
DESCRIPTION	<b>APPOINTMENT OF A SERVICE PROVIDER TO RENDER EMPLOYEE WELLNESS PROGRAMME FOR THE INDEPENDENT DEVELOPMENT TRUST (IDT) FOR A PERIOD OF THREE YEARS (3)</b>				
Briefing Session	<b>Compulsory Briefing Session will be conducted at: IDT Premises on the 30<sup>th</sup> of June 2023 @ 10H00.</b>  Glen Wood Office Park, Cnr Oberon & Sprite Street, Faerie Glen, Pretoria				
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>					
<b>INDEPENDENT DEVELOPMENT TRUST</b>					
<b>GLENWOOD OFFICE PARK</b>					
<b>CNR. OBERON &amp; SPRITE STREET</b>					
<b>FAERIE GLEN 0043</b>					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	N/A		CONTACT PERSON	N/A	
TELEPHONE NUMBER	N/A		TELEPHONE NUMBER	N/A	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	<a href="mailto:employeeewellness01@idt.org.za">employeeewellness01@idt.org.za</a>		E-MAIL ADDRESS	<a href="mailto:employeeewellness01@idt.org.za">employeeewellness01@idt.org.za</a>	
<b>SUPPLIER INFORMATION</b>					
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

**SBD 6.1 REQUIREMENT MUST BE COMPLIED TO CLAIM POINTS ON SPECIFIC GOALS**

<b>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No  [IF YES ENCLOSE PROOF]	<b>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No  [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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**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
<p><b>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.</b></p>	

## 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, 2022, 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](http://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: .....



(“The IDT”)

## **TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER EMPLOYEE WELLNESS PROGRAMME FOR THE INDEPENDENT DEVELOPMENT TRUST (IDT) FOR A PERIOD OF THREE YEARS (3)**

The Independent Development Trust (IDT) intends to ensure compliance with the Employee Wellness Policy, Occupational Health and Safety Act (Act No. 85 of 1993), the Constitution of RSA, Act 108 of 1996 (as amended), Labour Relations Act No 66 of 1995 (as amended), BCEA No 75 of 1997 (as amended), Mental Health Act No 17 of 2002, and other applicable legislation.

The IDT hereby invites interested bidders to tender for the rendering of Employee Wellness services for its employees, contract workers, Interns, Learners, and their immediate family members.

The successful bidder will enter into a Service Level Agreement with the IDT for a period of three years.

### **1. SCOPE OF WORK**

- 1.1 IDT has a responsibility to ensure that employees are offered a holistic wellness and support programme.
- 1.2 The Employee Wellness Programme (EWP) will be a full service for employees, contract workers, Interns, Learners and their immediate family members. For this purpose, immediate family member is defined as a spouse, children and anyone who is dependent financially/a dependent who stays in the same household as the IDT employee.
- 1.3 The approved establishment of the IDT at present comprises of **241 employees** and located as follows:

OFFICE	LOCATION	TOTAL POSTS
National Office	Pretoria	87
Gauteng	Pretoria	12
Eastern Cape	East London/ Beacon Bay	25
North West	Mafikeng	12
Western Cape	Cape Town	06
KwaZulu-Natal	Durban	41
Mpumalanga	Nelspruit	12
Free State	Bloemfontein	09
Limpopo	Polokwane	28
Northern Cape	Kimberley	09

- 1.3.1 The service charge must be per employee (filled posts/warm body and not the establishment)
- 1.3.2 The fully managed EWP must offer:
- a) Direct Services
  - b) HIV&AIDS and Health Risk Assessment Services
  - b) Marketing/promotion of EWP services to the employees of the IDT
  - c) Management and Administration of EWP services
  - d) Accredited Training, Workshops & Information Sessions on EWP programmes such as conflict management, mental disorders and behavioral problems
  - e) Occupational Health & Safety training interventions
  - f) Hazard Identification Risk Assessment
  - g) Regular Review of Policies and Procedures
- 1.3.3 The EWP offered must adhere to the prescribed minimum requirements and performance specifications, as stipulated under the following:

## 2. SECTION A

### 2.1 MANDATORY REQUIREMENTS

- 2.2.1 The Employee Wellness service provider must be a member of the Employee Assistance Professionals Associations of South Africa (EAPA SA). **(Proof of accredited certificate must be attached)**.
- 2.2.2 List of all staff members that will be involved in the execution of the programme must include their valid South African Certificates of membership of a particular body with a registration number for e.g., HPCSA, SACSSP, SANC, etc.
- 2.2.3 Joint Ventures must provide Memorandum of agreement with all relevant documents.

**\*Failure to comply with any of the abovementioned mandatory requirements will render your bid non-responsive and will be disqualified.**

### **3. SECTION B**

#### **3.1 SERVICE REQUIREMENTS**

3.1.1 The service must consist of direct, multilingual, confidential and unlimited access to a 24 hour, 7 days a week personal support service with all calls answered by fully qualified counselors.

3.1.2 Up to eight (8) personal counselling sessions per person per year (per condition) close to his or her residence or place of work for each person entitled to use the services, and to those for whom psychological counselling is appropriate. Each session must last approximately one hour. All counselling must be provided by fully qualified and registered clinicians. All those requiring face-to-face counselling will be contacted by the registered clinician within 24 hours of referral and the first consultation should take place within 48 hours (2 working days) for referral.

3.1.3 There must be a direct, confidential and unlimited access to a 24 hour, 7 days a week Life Management Service with all calls answered by Life Management specialists. The Life Management Service must comprise of:

##### **3.1.3.1 Legal Services**

3.1.3.1.1 This service must include telephonic legal advice, the provision of precedents and pro formas as well as referrals to appropriate legal services and bodies.

##### **3.1.3.2 Financial Services**

3.1.3.2.1 This service must assist those employees who require assistance with the management of debt and financial concern.

##### **3.1.3.3 Family Care Service**

3.1.3.3.1 This service must support employees to cope with the pressures of caring for their family members (including children with special educational needs and older or disabled relatives) by providing information and guidance on a wide range of childcare, eldercare and disability issues.

3.1.3.3.2 Trauma debriefing and counselling services should be offered promptly by professionals in instances where employees and/or their immediate family members have been exposed to trauma. Trauma counselling services must be provided within 1 to 48 hours of the traumatic incident depending on the nature thereof.

##### **3.1.3.4 Conflict Management Services**

3.1.3.4.1 To conduct workshops on conflict management.

3.1.3.4.2 Briefing and Training Managers and Supervisors/Team leaders:

3.1.3.4.3 Comprehensive initial briefing and training for managers and HR specialists should be covered by the service.

3.1.3.4.4 Individual Managers Consultancy. This is a flexible response service to give in depth support to managers' existing relationships with employees. In addition to its consultancy function, the service should include a formal managerial referral service for employees whose performance is impaired by personal problems as well as the provision of conflict resolution and mediation services.

#### **3.1.3.4.5 Health and Productivity Management**

- 3.1.3.4.6 Interventions to assist with absenteeism and presentism management; as well as health productivity management.

#### **3.1.3.5 Implementation and Promotion of EWP**

- 3.1.3.5.1 Client designed programmes must be offered to all employees that have an understanding of the system and are encouraged to use the EWP services. This will include:

- 3.1.3.5.1.1 Promotion of the programme through appropriate communication materials (i.e. brochures, booklets and wallet cards).
- 3.1.3.5.1.2 Creating an awareness EWP in National and Provincial Offices and supplemented with leaflets and other communication material to encourage use and provide information.

#### **3.1.3.6 Management and Administration**

- 3.1.3.6.1 A dedicated EWP Account Manager and Clinical Case Management team must manage the IDT's EWP.
- 3.1.3.6.2 Ongoing liaison with the IDT's co-ordinator(s) for the EWP with regard to the performance of the EWP service provider in respect of its obligations under this agreement.
- 3.1.3.6.3 Involvement and consultation with relevant stakeholders within the IDT.
- 3.1.3.6.4 Comprehensive case management database of all employees counselled by a dedicated Case Manager under the supervision of the Clinical Services Director as part of quality control.
- 3.1.3.6.5 The Service Provider must develop a comprehensive project plan to implement the EWP for approval by the IDT.

#### **3.1.3.7 Hazard Identification Risk Assessment**

- 3.1.3.7.1 Occupational Health and Related Risks Identified and Managed
- 3.1.3.7.2 Occupational Safety & Related Risks Identified and Managed
- 3.1.3.7.3 Ergonomics

#### **3.1.3.8 Regular Review Procedures**

- 3.1.3.8.1 The EWP service provider must have data systems that will provide detailed information about every call received by the Call Centre, without breaching confidentiality of its clients. This will be used to effectively and efficiently provide detailed information which will be of significant benefit to the EWP service provider in analysing the effective implementation of the programme.

## **4. SECTION C**

### **4.1 TECHNICAL SPECIFICATIONS**

#### **4.1.1 Implementation**

- 4.1.1.1 EWP will be introduced to IDT employees and implemented in both National and Regional Offices. There should be ongoing marketing and promotion of EWP services by the service provider in order to create awareness and education about the services.

#### **4.1.2 Management and Administration**

- 4.1.2.1 A dedicated EWP Account Manager must be allocated to the IDT.

- 4.1.2.2 The core functions will include:

- 4.1.2.2.1 Implementation of EWP in the IDT and management of the contract
- 4.1.2.2.2 Act as a liaison between the EWP service provider and the IDT
- 4.1.2.2.3 Continuous assessment and analysis of statistical data
- 4.1.2.2.4 Pro-active alerting of observed risks/threats to the IDT
- 4.1.2.2.5 Provide ongoing feedback of themes and trends in the field of EWP
- 4.1.2.2.6 Put in place mechanisms to deal with the complaints emanating from the implementation of the EWP in the IDT
- 4.1.2.2.7 In the event the EWP Service Provider indicates that there is a change in Account Manager, a formal and proper handover must take place from the releasing Account Manager to the new Account Manager
- 4.1.2.2.8 The change should be communicated within reasonable time

#### **4.1.3 The following reports must be submitted:**

- 4.1.3.1 Quarterly Report
- 4.1.3.2 Annual Report
- 4.1.3.3 Progress Reports

#### **4.1.4 The reports must include the following (amongst others)**

- 4.1.3.3 Trends and themes analysis
- 4.1.3.4 Statistics and calculations
- 4.1.3.5 Data Analysis
- 4.1.3.6 Uptake & Utilisation
- 4.1.4.5 Value for money
- 4.1.4.6 Benchmarking
- 4.1.4.7 Training/Workshops
- 4.1.4.8 Observations made by the service provider
- 4.1.4.9 Recommendations and interventions to be implemented

#### **4.1.5 Clinical and Life Management Services**

- 4.1.5.1 The following services must be offered:

- 4.1.5.1.1 Provide a direct, multilingual, confidential, unlimited access and 24 hour, 7 days a week service.
- 4.1.5.1.2 Eight (8) personal counselling sessions per person, per condition, per year, and per family.
- 4.1.5.1.3 Toll Free telephone number.
- 4.1.5.1.4 Call logging and recording facilities.
- 4.1.5.1.5 Provide the IDT with a professional, qualified, registered clinicians and specialists to render services.



#### **4.1.6 Clinical Incidents**

- 4.1.6.1 The EWP service provider must respond within 1-2 hours after a call is logged.
- 4.1.6.2 To offer individual including immediate family and group trauma debriefing as and when it is needed.
- 4.1.6.3 Debriefing for stress release and emotional impact for Investigators and Early Resolution Officers on quarterly basis.

#### **4.1.7 Benchmarking**

- 4.1.7.1 The EWP service provider must use local and international benchmarking techniques as part of the evaluation of the programme for its effectiveness and efficiency.

#### **4.1.8 Cost Benefit Analysis**

- 4.1.8.1 The EWP service provider must furnish the IDT on cost saving through the use of alternative services providers that could provide free of charge services.

#### **4.1.9 Complaints Handling Mechanism**

- 4.1.9.1 The IDT will receive complaints and forward them to the EWP Account Manager who will be responsible for the following:
  - 4.1.9.1.1 Acknowledgement of receipt of complaint(s)
  - 4.1.9.1.2 Investigation of complaint(s)
  - 4.1.9.1.3 Communication of findings to the IDT emanating from the investigation conducted
  - 4.1.9.1.4 Handling of complaint(s) within five (5) working days after being received.

#### **4.1.10 HIV&AIDS, STI and TB Services**

- 4.1.10.1 Provide training to all employees of the IDT, and their immediate family members.
- 4.1.10.2 Conduct bi-annual VCT and TB Screening (National and Regional Offices)
- 4.1.10.3 Provide counselling, support and referral
- 4.1.10.4 Peer Educator support/training
- 4.1.10.5 Promotion and Marketing of the EWP
- 4.1.10.6 Facilitate the enrolment of employees who tested positive in the HIV&AIDS management programme of their specific medical schemes
- 4.1.10.7 Provide an HIV&AIDS trend analysis report and recommendations without compromising individual confidentiality
- 4.1.10.8 Conduct a need analysis survey with an aim to better understand the employees' challenges in the IDT.

#### **4.1.11 Health Risk Assessment (HRA)**

- 4.1.11.1 The service will comprise of:
  - 4.1.11.1.1 Quarterly Screening for Diabetes, Cholesterol, Blood Pressure.
  - 4.1.11.1.2 Annual screening for Pap Smear, Mammogram, Prostrate Cancer, etc.
  - 4.1.11.1.3 Personalised health report for employees
  - 4.1.11.1.4 Qualified medical personnel to conduct the screenings and advise employees who are at risk on the day of screenings
  - 4.1.11.1.5 Access to a comprehensive online Wellness Programme, the online programme should include an integral collection of e-mail and web-based health management applications
  - 4.1.11.1.6 Provision of Health Screening to the IDT (National and Regional Offices) to raise awareness on key health and wellness issues, identify individuals at risk and recommend interventions.

#### 4.1.12 Additional information required

##### 4.1.12.1 The EWP service provider must:

- 4.1.12.1.2 Submit detailed proposals with timeframes on how to deliver the services mentioned above;
- 4.1.12.1.3 Submit information relating to the ownership and detailed CVs of a maximum 10 staff members that will be involved in the execution of the task;
- 4.1.12.1.4 Provide contactable references as well as proof of registration with the relevant professional bodies;
- 4.1.12.1.6 Submit a detailed breakdown of the budget per cost item;
- 4.1.12.1.7 Demonstrate knowledge of labour legislation in South Africa

#### 5. SPECIAL CONDITIONS

##### 5.1 Amendments to the Service Level Agreement (SLA)

Any amendments to the SLA between the service provider and the IDT shall be reduced to writing and agreed to by both parties.

#### 6. BID EVALUATION

##### 6.1 The Evaluation of bids will be done in three stages.

##### 6.2 Weighting factor:

The IDT has determined the weight of each criteria, which will ensure that the more important aspects will gain the most points. See Paragraph 5.

#### 7. GENERAL INFORMATION

**Any alterations to the bid document must be signed in full by the bidder or his authorised signatory. An accompanying letter from the bidder on their official letterhead which indicates such alterations must be attached to such amendments. Failure to comply with this will disqualify the bid. No tippex is allowed in the bid document.**

- a. The successful bidder will enter into a formal contract and service level agreement with the IDT.
- b. These terms of reference outline the requirements for the provision of EWP services to be rendered to the IDT.
- c. The IDT reserves the right to make use of any other service provider should the appointed service provider fail to fulfill its contractual obligations for any reason, at any time, during the contract period. The IDT use of another service provider will in terms of this SLA be deemed not to be a breach of contract, and the appointed service provider explicitly agrees to this terms.
- d. In the event of a failure to fulfill its contractual obligations by the appointed service provider, the IDT may consider pursuing recourse to remedy such failure. Such recourse will be explained in the SLA.
- e. The prospective service provider will be required to meet the critical criteria as detailed in Paragraph 4 of this document otherwise their proposal will not be considered for further evaluation.

- f. The IDT reserves the right to contact the companies provided as references by bidders in Paragraph 9 of this document. Referees will be requested to provide their experience on the services rendered in terms of the following:
- i) Management capabilities
  - ii) Accuracy of administrative procedures
  - iii) Customer's services (i.e. quality of services) after hours services
  - iv) Any other aspect of service delivery the IDT may deem important.
- g. Bidders must attach to the proposals the following Annexures:
- i) Annexure 1A: Valid EAPA SA accredited Certificate
  - ii) Annexure 1B: List of Valid South African Certificate of membership of the body with registration number for e.g. HPCSA, SACSSP, SANC etc.
  - iii) Annexure 2: Complaint Form
  - iv) Annexure 3: Account management
  - vi) Annexure 4: Utilisation Reports
  - vii) Annexure 5: Management Referral Form
  - viii) Annexure 6: Service fees

## 8. CRITICAL CRITERIA

**PLEASE ANSWER YES/NO TO THE QUESTIONS LISTED BELOW BY PLACING A MARK IN THE RELEVANT BOX.**

- 8.1 Critical criteria must be met. If bidders do not meet the criteria, their documents will not be considered for further evaluation.
- 8.2 The successful bidder must be a member of the Employee Assistance Professionals Associations of South Africa (EAPA SA) and the staff members must have valid South African certificate of membership of particular body with registration number for e.g. HPCSA, SACSSP, SANC etc. A certified copy of the valid certificate must be attached as Annexure 1 A and B.

8.2.1	Are you a member of EAPA SA? (A certified copy of the valid certificate must be attached as Annexure 1 A)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
8.2.2	Do your staff members have valid South African certificates of membership with registration numbers of that particular body (A certified copy of the valid certificate or proof of registration must be attached as Annexure 1 B)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
8.2.3	Are certified copies of the above attached?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

### 8.3 Twenty-four hour service and seven days a week

8.3.1	Are you able to offer 24/7 (and 365 days) service to the IDT?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
8.3.2	Are you able to allocate a full-time consultant dealing with the IDT only?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
8.3.3	Are you able to allocate an after-hour emergency contact number?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

8.3.4	Are you able to allocate an emergency contact person?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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## 9. PRICING

9.1 Please note that the IDT intends to enter into a Transaction Fee agreement with the successful service provider that must be fixed for the entire duration of the contract.

9.2 Please indicate what service fees will be applicable by completing Annexure 6.

### SERVICE FEES (ANNEXURE 6)

List service fees in South African Rand inclusive of VAT (the underneath must be completed)

SERVICE PROVIDED	FEE / COST PER TRANSACTION	COMMENT
<b>COUNSELLING: Per person</b>		
Telephonic:		
Face to face:		
Family Care Services:		
<b>VCT SCREENING: Per person</b>		
<b>Rate per nurse</b>		
<b>HRA SCREENING: Per person</b>		
<b>TRAINING/WORKSHOP FOR MANAGERS</b>		
<b>Manuals</b>		
<b>TRAINING/WORKSHOP FOR EMPLOYEES</b>		
<b>Manuals</b>		
<b>Peer Educator Training</b>		
<b>Manuals</b>		
<b>Marketing and promotions</b>		
<b>Delivery of invoices</b>		
<b>VALUE ADDED SERVICES</b>		
<b>Monthly Reports</b>		

<b>Ad-hoc Reports</b>		
<b>Account Management</b>		
<b>OTHER</b>		
<b>TOTAL</b>		

**THE TOTAL SERVICE FEES WILL BE ADDED TOGETHER IN ORDER TO EVALUATE POINTS FOR PRICE**

**BIDDERS ARE REQUIRED TO QUOTE FIXED SERVICE FEES FOR THE ENTIRE DURATION OF THE CONTRACT PERIOD**

Are the aforementioned service fees fixed for the amount of the contract?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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**IF SERVICE FEES ARE NOT FIXED, PROVIDE DETAILS.**

## **10 BID EVALUATION**

- 10.1 A Bid Evaluation Committee will be established by the IDT comprising of representatives of the IDT. The committee will evaluate all bids received by the deadline, according to the criteria indicated here. It will make a recommendation to the IDT's Bid Adjudication Committee for appointment of the preferred bidder.
- 10.2 Any bidder, which fails to submit any element of the Bid Submission Requirements, may, at the discretion of the Evaluation Panel, be rejected as unsuitable for evaluation and will therefore not be further considered.

## **11 EVALUATION CRITERIA**

- 11.1 **ALL PROPOSALS WILL BE EVALUATED TO DETERMINE COMPLIANCE WITH THE REQUIREMENTS AND CONDITIONS OF THE BID DOCUMENTS AND TERMS OF REFERENCE.**

### **Functional Proposal:**

Bidders must submit their functional proposal in a sealed envelope/ file with the name of the bidder, closing date and time and the bid number clearly indicated on the envelope/ file. This envelope/ file should contain the functional proposal and compulsory forms; SBD Forms and General Conditions of Contract.

### **11.2 PHASE 1: COMPLIANCE WITH MINIMUM REQUIREMENTS OF BID**

Bidders not complying with the requirements/ conditions of the bid documents and Terms of Reference will be eliminated from the evaluation process and therefore will not be considered further. This phase is not scored and bidders who fail to comply with all the mandatory criteria will be disqualified.

### **Compliance with tax legislation**

- Provide valid tax pin.

### **Completion of Request for Proposal (RFP) and Standard Bidding Documents (SBD) forms.**

- The bidder must submit the mentioned RFP and SBD 4, 6.1 forms with the bid application.

### **Responsive bids/proposals**

- Bidders must ensure their bids are responsive by completing and signing, where applicable, all relevant bid documents.

## **11.3 PHASE 2: FUNCTIONALITY EVALUATION**

The technical/ functional proposals will be evaluated individually on score sheets using the following value scale by a representative evaluation panel, according to the evaluation criteria indicated below.

Performance	Description	Score
Excellent	Answer <u>far exceeds</u> the functionality requirements	5
Very Good	Answer <u>meets and exceeds</u> the functionality requirements	4
Good	Answer <u>meets all</u> functionality requirements	3
Average	Answer <u>partially meets</u> the functionality requirements	2
Poor	Answer <u>fails</u> to meet the functionality requirements	1

The value scored for each criterion will be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for each criterion. These marks will be added and expressed as a fraction of the best possible score for all criteria. This score will be converted to a percentage and only bidders that have met or exceeded the minimum threshold of **70%** for functionality will be evaluated further and scored in terms of pricing and Specific goals indicated hereunder.

## **11.4 Functional Evaluation Criteria:**

The evaluation criteria will be as follows:

<b>1.</b>	<b>Proposed methodology</b>	
<b>1.1</b>	<b>Approach to work (Submit a detailed proposal with time-frames on how they intend to deliver their services)</b>	
	1.1.1 Direct Services	10
	1.1.2 Marketing/promotion of services to the employees of the IDT	10

	1.1.3 Regular Review Procedures								10
	1.1.4 HIV&AIDS and Health Risk Assessment Services								10
	1.1.5 Management and Administration of EWP services								10
	1.1.6 Qualifications of key personnel (Submit updated CVs as proof of experience for at least 10 personnel listed on 4.2.2 Annexure 1 B)								10
	1.1.7 Companies experience in the field of EWP (3 years minimum experience) 7 years and more ~ 5 = Excellent 6 years ~ 4 = Very Good 5 years ~ 3 = Good 4 years ~ 2 = Average 3 year ~ 1 = Poor								10
<b>1.2</b>	<b>Ability to service the IDT</b>								
	1.2.1 Indicate the ability to render services to 9 regions including the National Office ( <b>Tick the box - X</b> )								10
	National Office		Gauteng		North West		Limpopo		
	North Cape		Western Cape		Eastern Cape		Free State		
	1.2.2 Provide contactable references (attach referral letters)  The reference letter must contain the following information:  * Company name, * Company/ Institution letterhead, * Project name, * Duration of the project, * Contact person, and * telephone number.  5 or more references ~ 5 = Excellent 4 references ~ 4 = Very Good 3 references ~ 3 = Good 2 references ~ 2 = Average 1 reference ~ 1 = Poor								20
	<b>TOTAL POINTS</b>								<b>100</b>

**NB:** No query shall be allowed 12 hours prior to the closing date and time of the Tender.

### PHASE 3: PRICE AND SPECIFIC GOALS EVALUATION (80+20) = 100 POINTS

Only Bidders that have met the 65-point threshold in Phase 2 will be evaluated in Phase 3 for price and Specific Goals. Price and Specific Goals will be evaluated as follows:

In terms of regulation 6 of the Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000) as Amended, responsive bids will be adjudicated on the 80/20-preference point system in terms of which points are awarded to bidders on the basis of:

- The bid price (maximum 80 points)
- Specific Goals (maximum 20 points) – certificate to be provided

#### i. **Stage 1 – Price Evaluation (80 Points)**

Criteria	Points
----------	--------

Price Evaluation

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

80

The following formula will be used to calculate the points for price:

Where

$P_s$  = Points scored for comparative price of bid under consideration

$P_t$  = Comparative price of bid under consideration

$P_{\min}$  = Comparative price of lowest acceptable bid

#### ii. **Stage 2 – Specific Goals Evaluation (20 Points)**

##### a. **Specific Goals Points allocation**

A maximum of 20 points may be allocated to a bidder for attaining the specific goals as promoted by the IDT in accordance with the table below:

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women Ownership	3	6		
Youth Ownership	3	6		
People with Disabilities Ownership	2	4		
Black Male Ownership	2	4		



## Source Documents to be submitted with the Bid or RFQ

*CIPC Document	(Company Registration Document will be required for verification (CIPC DOC))
*Woman	(Originally Certified ID Document)
*Youth	(Originally Certified ID Document)
*People with Disability	(Letter from the Dr. Confirming the Disability)
*Black Ownership	(Originally Certified ID Document)

## 13. Documentation to be submitted

### 13.1 Please Note

- 13.1.1 All of the documentation must be submitted, with no omissions whatsoever. Where a particular form or format of documentation is stipulated, this is the **only** form or format in which these documents must be submitted. Failure to adhere to these requirements may result in the disqualification of the entire proposal.

### 13.2 Proposal drafted in response to Terms of Reference

- 13.2.1 Bidders are required to draft a proposal that will clearly indicate how they will fulfil the requirements as set out in the ToR.
- 13.2.2 Bidders should include the following information when drafting their proposals:
- (i) Proposals should make clear the relevant **skills, experience** in respect of these particular ToR. This is an important evaluation criterion. Bid participants should ensure that their proposals focus on how they will address the requirements of these ToR, rather than on achievements.
  - (ii) Expertise in the field of EWP.
  - (iii) Ability to service the IDT.
  - (iv) Proposals must contain the details of the proposed approach/ methodology to be adopted in order to deliver the service in accordance with the ToR.

### 13.3 Validity of proposals

- 13.3.1 The proposals must include a statement as to the period for which the proposal remains valid. The proposal must be valid for at least ninety (90) days from the due date for the submission of all bids.

### 13.4 Number of proposals

- 13.4.1 No late submissions will be considered under any circumstances.
- 13.4.2 The IDT will not disclose any details pertaining to the responses received, to any other participant, as this is regarded as confidential information.
- 13.4.3 Envelopes must not contain documents relating to any Request for Proposal (RFP) other than the one referred to in this RFP.
- 13.4.4 The responses to the RFP will be opened as soon as is practical after the expiry of the time advertised for receiving them.

**BIDDER'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 bidder 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. BIDDER'S DECLARATION**

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest 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 bidder, have a relationship with any person who is employed by the procuring institution?

YES / NO

2.2.1 If so, furnish particulars:

.....

.....

2.3 Does the bidder 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 bidder 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 consortium will not be construed as collusive bidding.

3.4 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.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder 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 bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 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 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 bidder

## 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.

- a) **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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	90	80
SPECIFIC GOALS	10	20
<b>TARGETED GROUP</b>		
Women	3	6
Youth	3	6
People with Disabilities	2	4
Black Male	2	4
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>	<b>100</b>

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)} \end{array}$$

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left( 1 + \frac{Pt - P_{max}}{P_{max}} \right)} \end{array}$$

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 tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women Ownership	3	6		
Youth Ownership	3	6		
People with Disabilities Ownership	2	4		
Black Male Ownership	2	4		

#### Source Documents to be submitted with the Bid or RFQ

- \*CIPC Document (Company Registration Document will be required for verification (CIPC DOC))
- \*Woman (Originally Certified ID Document)
- \*Youth (Originally Certified ID Document)
- \*People with Disability (Letter from the Dr. Confirming the Disability)
- \*Black Ownership (Originally Certified ID Document)

## 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:** .....



## CHECKLIST

### Requested Bidding Documents

RFQ	Completed and Signed	*Yes/No
	Valid tax pin	*Yes/No
SBD 1.1	Completed and Signed	*Yes/No
SBD 4	Completed and Signed	*Yes/No
SBD 6.1	Completed and Signed	*Yes/No
	Proof of accredited certificate of member of the Employee Assistance Professionals Associations of South Africa (EAPA SA)	*Yes/No