

## THE PUBLIC SERVICE SECTOR EDUCATION TRAINING AUTHORITY

### TERMS OF REFERENCE

### FOR THE APPOINTMENT OF EXTERNAL HEALTH RISK MANAGEMENT TO CASE MANAGE AND ASSESS THE HEALTH OF AN EMPLOYEE

**QUOTATION NUMBER: RFP/2021/000695**

**CLOSING DATE: 20/09/2023**

**CLOSING TIME: 12:00**

No late applications will be accepted

**Board members:** Mr Thulani Tshefuta (Chairperson) | Ms Christelene Brink | Mr Lewis Nzimande | Ms Gaolape Anastacia Seokolo  
Mr Nkojane Nelson Maesela | Mr Patrick Babsy Makhafane | Ms Nolukhanyo Amanda Kelengeshe | Ms Violet Matshidza  
Ms Tampane Molefe-Sefanyetso | Mr Patrick Boitumelo Moopelwa | Ms Linda Dlodla | Ms Nelisiwe Nzimande  
Ms Nomabandla Silinyana | Mr Marcus Ramakgale

**CEO:** Ms Bontle Lerumo

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## 1. INTRODUCTION

- 1.1. Public Service Sector Education and Training Authority (PSETA) is established in terms of section 9(1) and (2) of the Skills Development Act (Act No. 97 of 1998 as

amended). The Skills Development Act is the enabling legislation and guides PSETA operations as a Sector Education and Training Authority (SETA), as set out in section 10 of the Act.

- 1.2. PSETA's overarching strategic imperative is building the skills required for a developmental, capable and ethical state. The scope of coverage includes National and Provincial Government departments, identified public entities, and National Parliament and Provincial Legislatures. The focus and emphasis of the PSETA is primarily on transversal skills, i.e., functions of administration, management, planning legislation, policy administration, monitoring and evaluation, etc.
- 1.3. PSETA shares responsibility for human resource development (HRD) in the Public Service with the DPSA, which regulates HRD across the Public Service, and with State and sector academies, including the National School of Government (NSG), that provide the sector-specific training.

### **Vision**

To be the heart of developing a skilled, capable and innovative public sector workforce.

### **Mission**

To facilitate the delivery of a capable, ethical and developmental public service sector workforce through:

- researching skills demand and supply in the sector;
- effective delivery of skills development interventions based on occupationally directed qualifications;
- monitoring, evaluation and reporting of the implementation of education, training and skills development in the sector; and
- a capable institution.

### **Values**

- Honesty and Integrity;

- Accountability;
- Service Excellence; and
- Fairness and transparency.

## **2. PSETA Strategy**

- 2.1. PSETA plays a critical role in the education and skills work stream, specifically in supporting access to TVET and CET colleges, and facilitating workplace opportunities for youth in the public service sector.
- 2.2. The primary policy mandate for PSETA is the National Skills Development Plan (NSDP) 2030).
- 2.3. The NSDP, which came into effect from 01 April 2020, follows from the previous National Strategy (NSDS III) to be achieved mainly by SETAs in collaboration with the DHET, TVET colleges, CETs, universities and the National Skills Fund (NSF). The NDSP is set within the broader policy framework of the NDP.
- 2.4. The PSETA SSP has identified the following four strategic focus priorities for the PSETA which will be delivered through relevant programmes:
  - 2.4.1. Priority 1: Establish strategic partnerships with key stakeholders
  - 2.4.2. Priority 2: Increased research and impact assessment of programmes
  - 2.4.3. Priority 3: Strengthen capacity of public institutions and provision of occupational qualifications.
  - 2.4.4. Priority 4: Implement workplace-based learning programmes in building the workplace into a training space.

## **3. PSETA Strategic Objectives**

- 3.1. The PSETA has established strategic relationships with identified stakeholders at national and provincial levels. These are key to championing and coordinating specific competencies within the public sector.
- 3.2. The relationships and partnerships also include the Department of Public Service and Administration (DPSA), the National School of Government (NSG), Public Entities,

Higher Education Institutions, Technical Vocational Education and Training (TVET) Colleges, Community Education and Training (CET) Colleges, Quality Assurance Bodies, Bargaining Councils, Labour Federations and Skills Development Providers, who continue to play an important role in contributing towards the implementation of the priority skills development interventions contained in the Sector Skills Plan (SSP).

#### **4. BACKGROUND & CONTEXT**

- 4.1. The PSETA appoints **(65) employees** within the organization and would like to ensure that their health is well managed. The service provider with targeted expertise to review/assess the health of employees in the organization it is required to conduct a full assessment based on the Ill-Health Policy and Procedure **as and when required**.
- 4.2. The service provider will be required as and when a need arises to conduct the Ill-Health of identified employee in the organisation who their sick leave exhausted due to continued ill health to determine if such an employee is fit to perform duties as required.

#### **5. OBJECTIVE OF THE ASSIGNMENT**

- 5.1. The PSETA has an employee who has been continuously absent from work and consulting a medical practitioner due to ill-health. Based on the nature of the employee's sickness and the recommendation of the medical practitioner, the employer referred the affected employee to the Occupational ill-health assessment practitioner to assess his nature of illness and ability to work for recommendations and further guidance. On the basis of the recommendations, and subsequent to the assessments attended, the employer reduced the working hours to accommodate an employee.
- ~~5.2.~~ The ill-health of the affected employee is not improving significantly and his sick leave days are being exhausted due to continued absence of the employee to date.
- 5.3. The delivery of work shall be as per the set standards and terms of agreement between the PSETA and a chosen service provider. The service provider must provide work

that meets all regulations that are applicable and any relevant professional standards that are implied through legislation.

## **6. SCOPE OF WORK**

The scope of work covers the following:

- 6.1. The service provider to act as a case officer for and behalf of the PSETA
- 6.2. Assess the absenteeism records, ill-health, capacity and/or incapacity to fulfil employment requirements, medical history and future medical implications;
- 6.3. Evaluate the affected employee's medical condition and advise PSETA of the probable course of action.
- 6.4. Provide guidance to the PSETA with regard any possible reasonable accommodation and feasibility thereof as and when required and/or recommended by the medical reports.
- 6.5. Present the case file of the affected employee at various forums for and behalf of the PSETA including but not limited to the incapacity hearing, Exco, PSETA Board etc.
- 6.6. Refer the affected employee to the recommended Medical Practitioner for final assessment and draw recommendations as and when required
- 6.7. Be available to respond to project queries from PSETA.
- 6.8. Draft a report of the final assessments with recommendation; and
- 6.9. Present the recommendation to management.

## **7. METHODOLOGY AND APPROACH**

The Service Provider will undertake the following:

- 7.1. Participation during the inception meeting of the project with the PSETA Human Capital Management for briefing;
- 7.2. The Inception Report from the provider must include detailed work delivered, a work plan and assigned responsibilities, deliverables, and outline structure of the final report.

- 7.3. Present draft reports on the medical findings to Management or any other Committee. After approval by the PSETA, the service provider will incorporate the approved comments and changes into the report before the final report can be adopted and submitted.

## **8. COMPETENCY AND EXPERTISE REQUIREMENTS**

The Service Provider should meet the following requirements:

- 8.1. Have knowledge and understanding of Health Risk Manager in medical processes
- 8.2. Knowledge of analysing medical reports;
- 8.3. Knowledge of Health prescripts in the workplace;
- 8.4. Report writing and presentation of to management; and

## **9. TIMELINES OF THE PROJECT**

- 9.1. The duration of the contract will be for a period of 36 months and be contracted to render the service as and when required to assess the health of an employee.

## **10. QUALITY AND REPORTING REQUIREMENTS**

- 10.1. The service provider will report to the PSETA Human Capital Management Department as and when required. Quality management of the service must be ensured by the service provider and will be overseen by the PSETA.

## **11. INTELLECTUAL PROPERTY**

- 11.1. All the information derived from this assignment will remain the property of the South African Government. This includes data gathering tools, raw data and all reports. Publication of any information emanating from this assignment is prohibited unless permission to cite the findings is approved by the PSETA.

## **12. QUALIFICATION AND EXPERIENCE**

Technical Proposal

- 12.1. CV and certified copies of the service provider.
- 12.2. Health Risk Management qualifications (Please provide copies of Qualifications, Board Registration and experience.)
- 12.3. Bidders should have a basic understanding of Health and Risk Management, Medical, Nursing, Business and Law with at least 5 to 10 years post experience conducting medical assessment.
- 12.4. Reference letters from past/current clients indicating work done in conducting employee health assessment.

### 13. PRICING

- 13.1. The proposed total pricing must be inclusive of VAT. PSETA reserves the right to negotiate the selection/prioritization of deliverables in line with the contract price.
- 13.2. PSETA requires a breakdown/ fee narration on any of the services items that are priced and service providers are required to provide same, after contracting, when submitting invoices for services rendered.
- 13.3. Bidders should quote their rates on an hourly basis for the services, in their proposals.

### 14. EVALUATION PROCESS

#### PHASE 1

The bids will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for specific goals , once the minimum functionality criteria are met.

Phase 1: Functionality Evaluation	
Phase 2: Preferential Point System	Points
Price	80
<b>Special goals</b>	<b>20</b>
Black owned company	8



Women	4
Youth	5
Disability	3
<b>Total</b>	<b>100</b>

## PHASE 2 – FUNCTIONALITY EVALUATION

Bids must meet the minimum eligibility criteria in respect of functionality of 75 points out of 100 points that will be awarded for functionality before they are considered further. Any bid that does not meet the minimum eligibility threshold will be automatically disqualified. The functionality criteria together with the maximum points to be awarded are set out below.

Domain	Evaluation Method	Criteria	Weight	Score
<b>1. Knowledge and experience of Health and Risk Management from the project leader</b>	The project leader must have: <ul style="list-style-type: none"> <li>Relevant experience in Health And Risk Management at the workplace: The resource to be deployed to PSETA should have a minimum of 5 - 10years' experience in conducting the health of employee and drawing conclusion.</li> <li>Please provide a comprehensive curriculum</li> </ul>	<ul style="list-style-type: none"> <li>1= No submission of CV and/ or certified copies of qualifications</li> <li>2= CV, Certified copies of qualifications and 5- 10 years' experience</li> <li>3 = CV, Certified copies of qualifications and</li> </ul>	<b>40</b>	<b>1</b>
				<b>2</b>
				<b>3</b>
				<b>4</b>
				<b>5</b>

Domain	Evaluation Method	Criteria	Weight	Score
	vitae (CV) indicating the required experience. <ul style="list-style-type: none"> <li>Qualifications: Health Risk Management, Nursing, Insurance, Medical, Law, Business Qualifications.</li> </ul>	9 years' experience. <ul style="list-style-type: none"> <li>4 = CV, Certified copies of qualifications and f 10 years' experience.</li> <li>5 = CV, Certified copies of qualifications and 11 years and above experience.</li> </ul>		
<b>2. Knowledge and experience of team members</b>	The team members must have: <ul style="list-style-type: none"> <li>Relevant experience in Health And Risk Management at the workplace: The resource to be deployed to PSETA should have a minimum of 5 - 10years' experience in conducting the health of employee and drawing conclusion.</li> <li>Please provide a comprehensive curriculum vitae (CV) indicating the required experience.</li> <li>Qualifications: Health Risk Management, Nursing,</li> </ul>	<ul style="list-style-type: none"> <li>1= No submission of CV and/ or certified copies of qualifications</li> <li>2= CV, Certified copies of qualifications 5 years' experience</li> <li>3 = CV, Certified copies of qualifications and 6-7 years' experience.</li> <li>4 = CV, Certified copies of qualifications 8-9 years' experience.</li> </ul>	<b>35</b>	<b>1</b>
				<b>2</b>
				<b>3</b>
				<b>4</b>
				<b>5</b>

Domain	Evaluation Method	Criteria	Weight	Score
	Insurance, Medical, Law, Business Qualifications.	<ul style="list-style-type: none"> <li>5 = CV, Certified copies of qualifications and 10 years and above experience.</li> </ul>		
<b>3. References</b> Traceable references of clients where projects of similar nature were conducted.	<ul style="list-style-type: none"> <li>Reference letters as evidence of previous work done conducted.</li> </ul> (NB: <i>The Reference Letter(s) must be in the letterhead of the previously serviced organisation and should reflect at least name of the organisation, title of the study, year conducted, year completed, contactable reference name and contact details</i> ) <b>Reference letters must be on a letterhead, signed by the CEO/Head and dated.</b>	<ul style="list-style-type: none"> <li>1 = No reference letter provided of work previously done.</li> <li>2 = 1 to 2 reference letters of work previously done</li> <li>3 = 3 reference letters of work previously done</li> <li>4 = 4 reference letters of work previously done.</li> <li>5 = 5 or more reference letters work previously done.</li> </ul>	25	1
				2
				3
				4
				5
<b>Total</b>			<b>100</b>	

## 15. FORMAT OF THE BID SUBMISSION

- 15.1. Company profile indicating all the requirements as per the evaluation criteria.
- 15.2. Team member names and roles.
- 15.3. CV and certified copies of qualifications.

15.4. Track record and experience.

15.5. Submission of all applicable documents as indicated below:

- Certified copy of doctor's certification with medical practice number.
- Certified copies of the director's ID's document.(Refer to SBD 6.1) to claim points
- Valid Tax compliance status (TCS) PIN or proof of exemption from SARS.
- Copy of the registration document of the organisation (CIPC); and
- Copy of the Central Supplier Database registration.

## **16. IMPORTANT INFORMATION FOR BIDDERS**

16.1. A valid Tax compliance status (TCS) PIN or proof of exemption from SARS.

16.2. All Standard Bidding documents (SBD) documents must be completed and signed.

- SBD 1
- SBD 4
- SBD 6.1
- Proof of registration on Central Supplier Database.

NB: Please note that failure to submit documents requested on section 16(16.2) will render the proposal disqualified.

**Bid applications must be submitted electronically to :**

Ms Ursula Mathonsi

Manager: Supply Chain Management

The PSETA

Ground Floor, Woodpecker Building

Hillcrest Office Park, Lynwood

Pretoria

No late applications will be accepted.

Please direct all queries to [ursulam@pseta.org.za](mailto:ursulam@pseta.org.za)



Carleb Nxumalo

03.08.2023