



PROVISION OF SPECIALISED HEALTH RISK MANAGEMENT SERVICES TO THE SOUTH AFRICAN SOCIAL SECURITY AGENCY (SASSA), HEAD OFFICE AND NINE (9) REGIONS FOR THE PERIOD OF THREE (3) YEARS.

1. BACKGROUND

- 1.1 In 2006, the Minister for Public Service and Administration determined the implementation of a Policy on Incapacity Leave and Ill-Health Retirement (PILIR), within the General Public Service.
- 1.2 SASSA – a Government Entity is responsible for implementing PILIR; thereby aligning its internal processes of incapacity leave and ill-health retirement management to those ascribed to by the Public Service.
- 1.3 The implementation of PILIR aims to support the below-mentioned objective, and, implementing the latter involves among others, obtaining of the services of a single suitable bidder specializing in health risk management (Health Risk Manager).

2. OBJECTIVE OF THE BID

- 2.1 To appoint a service provide to provide specialised Health Risk Management services to the South African Social Security Agency **effective from 1 June 2026.**

3. SCOPE OF WORK

- 3.1 The Bidder will be expected to set up structures and processes, which will ensure that:
 - 3.1.1 Intervention and management of incapacity leave in the workplace accommodate temporary or permanently incapacitated employees; and

- 3.1.2 Develop recommendations for SASSA to facilitate rehabilitation; re-skilling; re-alignment and retirement of temporary or permanently incapacitated employees where appropriate.

4. SASSA STRUCTURE

- 4.1 SASSA consists of a National Office (situated in Pretoria) as well as nine (9) Regional Offices (situated in each Province), together with a range of Districts and Local offices spanning the entire country; with a staff complement of around Seven thousand, one hundred and twenty-nine (**7129**) employees.
- 4.2 The contract will be coordinated by the Human Capital Management Department which is based in Pretoria.
- 4.3 The services should be provided directly to nine (9) Regions and Head Office.
- 4.4 The bidder's key contact person/s must be available to provide face-to-face services to SASSA Head Office/Regions as and when required.

5. PROJECT PERIOD

- 5.1 The project is for a period of three (3) years, and it would be expected of the successful service provider to assume duty immediately after the award and signing of the Service Level Agreement (SLA).

6. EXPECTED DELIVERABLES

6.1 Specific Roles and Responsibilities of the bidder

- 6.1.1 SASSA's account to be centrally managed by a liaison person, although the Agency will have a range of users nationally who will interface directly with the bidder.
- 6.1.2 To render services through multi-disciplinary medical experts (such as but not limited to Occupational Therapist, Psychiatrist, Physician), who will assess and

advise the Employer on the applications for temporary incapacity leave and applications for ill-health retirement within specified timeframes.

- 6.1.3 To provide services for secondary medical assessments initiated by SASSA.
- 6.1.4 To utilize human resources who are registered with Health Professions Council / South African Nursing Council at all times.
- 6.1.5 To provide a list of networks for referrals of applications in nine (9) Provinces.
- 6.1.6 To provide service delivery continuity by ensuring there is always qualified person to provide uninterrupted service.
- 6.1.7 To provide relevant information and training to staff, practitioners, managers and relevant stakeholders in relations to PILIR processes.
- 6.1.8 To provide four virtual training sessions per annum for each Region and Head Office.
- 6.1.9 To provide systems and technical staff with the required medical knowledge and experience to do incapacity leave and ill-health retirement assessments, refer employees to accredited assessors and other health professionals for further opinions and provide professional assessments and advise on employee applications for temporary incapacity leave and ill-health retirement, within specified timeframes (with due consideration to the guidelines in certain high incidence illnesses), to enable the effective and efficient taking of decisions regarding such applications.
- 6.1.10 To provide help desk services and regular communication between the service provider and HR Users at Head Office and Regions.
- 6.1.11 To provide assistance during legal proceedings and hearings, etc.; and
- 6.1.12 The appointed service provider must be able to provide an invoice and a statement on a monthly basis, accompanied by a usage report which reflects the HR Users' particulars and the details of the services rendered.
- 6.1.13 To have knowledge of relevant Health Risk Management Legislative Framework within the Public Service.

6.2 Project Management

- 6.2.1 To provide comprehensive project implementation plan which addresses approach, activities, implementation process, monitoring and evaluation support through the regular submission of detailed project management, and management information reports including trend analysis (quarterly, annually and ad-hoc reports), to SASSA.
- 6.2.2 The Bidder must demonstrate ability to render the required services in all 9 Regions, in line with SASSA's business needs, at exceptional standards, in full compliance with specified turn-around-times.
- 6.2.3 Quality of project comprehension demonstrated in the proposal, for implementation and evaluation of services rendered.
- 6.2.4 Training plan in line with the requirements; and
- 6.2.5 The project must include contingency plan.

6.3 Data Management System

- 6.3.1 The appointed Service Provider must maintain systems to handle applications from various National users at a central point, and advise directly back to such National users, through various document management enablers (courier services, fax and web-based facilities);
- 6.3.2 Ensure electronic case load - and information management (including but not limited to electronic case load databases, electronic document management systems for reporting, electronic project management systems, etc.), as well as the systems to explore the data and undertake trend analysis;
- 6.3.3 Systems to ensure proper data security, integrity, and archiving of employees information;
- 6.3.4 Ensure available / accessible /help desk services;
- 6.3.5 Systems to ensure regular communication between the Service Provider and Users / SASSA; and
- 6.3.6 The bidder must put systems in place to ensure compliance with POPIA (Protection of Personal Information Act, 2013).

6.4 Turnaround Times

- 6.4.1 The turnaround times will be required to be adhered to, from the time of receipt of completed applications from the Employer, until full completion of the assessment and submission of final advice, for:
- 6.4.2 Short incapacity periods (assessment of requests for additional sick leave, for periods less than 30 days) – 12 working days.
- 6.4.3 Long incapacity periods (assessments of requests for additional sick leave, for periods of more than 30 days), where a secondary assessment is not required - 12 working days.
- 6.4.4 Long incapacity periods (assessment of requests for additional sick leave, for periods of more than 30 days), where a secondary assessment is required – 30 working days.
- 6.4.5 Ill-health retirement assessments (full assessment) and advice – 90 working days; and
- 6.4.6 Failure to adhere to the above-mentioned turnaround times will result in SASSA implementing penalties as per the Service Level Agreement.
- 6.4.7 No advance payment will be made. Payment would be made in terms of the deliverables or unless otherwise agreed upon by SASSA and the successful bidder.
- 6.4.8 The bidder will be required to sign a declaration of secrecy with SASSA.
- 6.4.9 The bidder will be required to sign a service level agreement with SASSA prior to the commencement of the contract.
- 6.4.10 The appointed service provider will be required to comply with Policy and Procedure on Incapacity Leave and Ill-Health Retirement (PILIR) at all times.

6.5 Supporting Structures

- 6.5.1 The liaison person must be made available to coordinate the contract and ensure that the service is appropriately managed at all times.

- 6.5.2 The bid submission to provide capability of rendering service delivery to all nine regions, including Head Office.

7 SASSA'S RESPONSIBILITIES

- 7.1 Notify Health Risk Manager of all applications for incapacity leave or ill-health retirement as required of PILIR and the directive.
- 7.2 Deliver all prescribed and other relevant documentation received from the employee, including any and all medical reports, medical certificates and sick leave records in a coherent and legible form to the Health Risk Manager within the specified time frames.
- 7.3 Provide reasonable access to the leave records of the employee for the purpose of considering and investigating the application.
- 7.4 Procure any and all necessary and required consent and releases for the reasonable disclosure of any confidential medical information or other records from the employee in connection with any of the consultancy services.
- 7.5 Make available information pertaining to the PILIR case and personnel as may be reasonably required for considering any application.
- 7.6 Manage the contract in a professional manner.
- 7.7 Provide appropriate information as and when required and only in situations where it is required by the service provider to fulfil their duties.
- 7.8 Not accept any responsibility for accounts/expenses incurred by the service provider that was not agreed upon by the contracting parties.
- 7.9 SASSA will only make monthly payments upon receipt and verification of the usage report and invoice from the appointed service provider.
- 7.10 The Agency will ensure that the appointed service provider will be provided with all data required to perform its duty.
- 7.11 SASSA reserves the right to conduct a compulsory vetting / screening process on the appointed service bidders including all resources that will be working with SASSA's information/data.

8 MONITORING AND EVALUATION

8.1 The appointed service provider will –

- 8.1.1 Submit quarterly reports to the General Manager: Human Capital Management and /or General Managers: Corporate Services in the Regions. In addition, information must be provided as and when required.
- 8.1.2 Attend meeting requests from the Human Capital Management Units as and when required.
- 8.1.3 Attend quarterly Steering Committee Meetings.
- 8.1.4 Provide strategic guidance to Human Resource Senior Management (HCM Forum) with regards to identified trends analysis and recommendations or proposed interventions as and when required.

9 BID EVALUATION CRITERIA

The evaluation process will be carried out in terms of the following two (2) Stages.

The bid proposals shall be evaluated in accordance with the 80/20 principle and shall be conducted as follows:

STAGE 1: Administrative Compliance, Functionality Evaluation

- ✓ **Phase One:** Administrative Compliance
- ✓ **Phase Two:** Functionality Evaluation

STAGE 2: Price & BBBEE points

- ✓ **Phase One:** Specific Goals

9.1 **STAGE 1 - PHASE 1: ADMINISTRATION COMPLIANCE**

Bidders must provide the following:

NO	REQUIREMENTS FOR ADMINISTRATIVE COMPLIANCE
9.1.1	Proof of registration with Central Supplier Database
9.1.2	Tax compliance status verification pin
9.1.3	Fully completed and signed Standard Bidding Documents (SBD's)
9.1.4	Annexure A – List of successfully rendered Contract/s

Failure to submit the abovementioned documents may result in your proposal being disqualified.

9.2 **STAGE 1 - PHASE 2: FUNCTIONALITY CRITERIA**

9.2.1 Prospective bidders will be evaluated for functionality as stipulated in the Terms of Reference. Only those bidders who score a minimum of **70 points out of 100 points** on functionality will be considered and proceed to be evaluated further on Price and B-BBEE status level contributor and **80/20** principle will apply.

9.2.2 Bidders will be evaluated in terms of the following values:

1= Poor, 2= Average, 3= Satisfactory, 4 =Good, 5 =Excellent

CRITERIA	Weight
The bidder is expected to demonstrate:	
a. The methodology and approach	
<ul style="list-style-type: none">Proposed plan towards implementation, planning and approach aligned to time frames which will include the following:<ul style="list-style-type: none">✓ Utilization of the adequate infrastructure and allocate the necessary resources, including personnel, technology, financial resources and expertise to support SASSA's requirements.	20
<ul style="list-style-type: none">✓ Outline the process flow of activities relating to incapacity leave assessment.	10
<ul style="list-style-type: none">✓ Provide service level reporting tool regarding the overall	10

<p>incapacity leave utilization.</p> <ul style="list-style-type: none"> ✓ Provide a comprehensive training plan regarding the process and procedures of the PILIR application. ✓ Provide Help desk service plan to ensure service delivery and continuous improvement. ✓ Provide contingency Plan not limited to data privacy and confidentiality, data accuracy and completeness, resource constraints, system failure, misinterpretation of data, legal and regulatory risks. 	<p>5</p> <p>10</p> <p>5</p>
<p>b. The bidder must have experience in Health Risk Management services, indicating that the service was successfully rendered and supported by (Complete Annexure A).</p> <p>Less than 1 year = 1</p> <p>Less than 3 years to 1 year = 2</p> <p>3 – 4 years = 3</p> <p>Above 4-5 years = 4</p> <p>Above 5 years = 5</p> <p>NB: Bidder must provide a list of contract/s that were successfully rendered and indicate the number of years of experience acquired and which are in line with Health Risk Management services (Complete Annexure A).</p> <p>NB: If a bidder managed multiple contracts during the same specified period, each contract will be individually considered when determining the final points to be awarded. This ensures that the bidder's experience across all relevant contracts is fully recognized in the evaluation process.</p> <p>NB: It is the responsibility of each bidder to supply SASSA with detailed and contactable reference information. Failure to provide such reference details will disadvantage the bidder during the evaluation process, resulting in less scores.</p> <p>NB: SASSA will verify information provided in Annexure A in part or in full and the process will not disadvantage any bidder in terms of achieving the maximum score during the evaluation process.</p>	<p>20</p>

<p>c. The bidder must have a track record and capability in Health Risk Management services which will be evaluated as follows: (Only concurrent contracts will be considered cumulatively for evaluation)</p> <p>0- 2000 employees = 1</p> <p>Above 2000 –3000 = 2</p> <p>Above 3 000 – 4000 = 3</p> <p>Above 4000 – 5000 = 4</p> <p>Above 5000 employees = 5</p> <p>NB: Bidder to indicate the number of employees being serviced and that the service was successfully rendered. (Complete Annexure A).</p> <p>NB: If a bidder managed multiple contracts during the same specified period, each contract will be individually considered when determining the final points to be awarded. This ensures that the bidder's experience across all relevant contracts is fully recognized in the evaluation process.</p> <p>NB: It is the responsibility of each bidder to supply SASSA with detailed and contactable reference information. Failure to provide such reference details will disadvantage the bidder during the evaluation process, resulting in less score.</p> <p>NB: SASSA will verify information provided in Annexure A in part or full and the process will not disadvantage any bidder in terms of achieving the maximum score during the evaluation process.</p>	20
Total	100

9.3 **STAGE TWO**

PHASE ONE: PRICE AND PREFERENTIAL POINT SYSTEM

CRITERIA	WEIGHT
Price	80
Specific goals	20
Total	100

Price

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

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{min} = Price of lowest acceptable tender

The quotation to include the following minimum structure:

- ✓ A detailed cost estimate indicating a breakdown of the activities and associated all direct and indirect cost, resources per case, total cost for virtual training sessions. **(complete Annexure B).**
- ✓ Prospective bidders to provide firm price per item inclusive of Value Added Tax (VAT) as stipulated in the attached **Annexure B.**
- ✓ The onus is upon the prospective bidder(s) to take into account all costs for the duration of the contract period. All price offered should be in a South African rands value.

Preference points will be awarded to a bidder for attaining the specific goals in accordance with the table below:

Specific Goals	Number of points (80/20)
B-BBEE Status Level 1 - 2 contributor with at least 51% black women ownership	20
B-BBEE Status Level 3 - 4 contributor with at least 51% women ownership	18
B-BBEE Status Level 1 - 2 contributor with at least 51% black youth or disabled ownership	16
B-BBEE Status Level 1 - 2 contributor	14

B-BBEE Status Level 3 - 8 contributor with at least 51% youth or disabled ownership	12
B-BBEE Status Level 3 - 4 contributor	8
B-BBEE Status Level 5 - 8 contributor	4
Others (Non-Compliant)	0
Note: In the event of a bidder claiming more than one specific goal category, SASSA will allocate points based on specific goal with the highest points.	

10 SUBMISSION REQUIREMENTS

10.1 The bidder to submit the following:

10.1.1 Annexure A

✓ (contract/s list (client base) The bidder to submit annexure A indicating full reference list of the client/s in respect of successfully implemented Health Risk Management services.

10.1.2 Annexure B (Pricing schedule)

10.1.3 The bidder is expected to provide bid proposal and demonstrate the capability to provide Health Risk Management Services in line with the bid requirements.

10.1.4 Proof of registration with Central Supplier Database

10.1.5 Tax compliance status verification pin

10.1.6 Fully completed and signed Standard Bidding Documents (SBD's)

11 DELIVERY OF BID DOCUMENT

11.1 The proposal must be submitted in digital and physical copies.

11.2 An original response should be accompanied by an electronic soft copy submitted on e-tender portal.

11.3 All the contents of the copies should be in the exact same order as in the hard copy to make it easier to navigate and evaluate the bid response.

11.4 The bid submission to be clear, concise, factual, and to respond to all information required.

11.5 It is the responsibility of the bidder(s) to ensure that his/her proposal(s) are submitted in the bid box and through e-tender portal before closing date and time of the bid as stipulated in the bid document.

12 BID CONDITIONS

12.1 Bidders are required to submit technical proposal separately from financial proposal.

12.2 The Bid will be subjected to general conditions of contract as set out by the National Treasury.

12.3 Sassa reserves the right to negotiate price with the preferred bidder.

12.4 SASSA reserves the right to contact the client references provided by the bidder and it is the bidder's responsibility to provide SASSA with contactable reference details.

12.5 Bids to be submitted in line with specifications.

12.6 Any misrepresentation of information will lead to a bid disqualification / or cancelation of the contract.

13 CONTRACT TERMS AND CONDITIONS

13.1 It is the responsibility of the appointed service provider to designate a liaison person or project manager to SASSA who possesses substantial expertise and demonstrates experience in managing health-related matters and projects.

The designated liaison person/project manager should be able to serve as the primary point of contact between the service provider and SASSA, ensuring effective communication, coordination, and project management throughout the duration of the contract. Failing which, such will result in a termination of contract.

It is the responsibility of the service provider to promptly notify SASSA's designated project manager at least 30 days prior to any changes.

13.2 It is the responsibility of the bidder to ensure that all services provided across the nine (9) provinces are rendered by skilled and qualified staff/ affiliates registered with the Health Professions Council / South African Nursing Council to render

- medical and health related services who will advise the Employer on the temporary incapacity leave and Ill-health Retirement applications.
- 13.3 The contract will be coordinated by the Human Capital Management Department which is based in Pretoria.
 - 13.4 The services should be provided directly to nine (9) Regions and Head Office.
 - 13.5 The bidder's key contact person/s must be available to provide face-to-face services to SASSA Head Office/Regions as and when required.
 - 13.6 To sign the Services Agreement and Service Level Agreement (within 30 days from date of the awarding of the tender). The appointed bidder to notify SASSA on any replacement /changes relating to liaison person. The new appointments to comply with SASSA requirements of this bid.
 - 13.7 The prospective bidder shall have to treat all available data provided by the Agency in the process as strictly confidential. Such data becomes the property of the Agency and should not be utilized for any other purpose outside the contract.
 - 13.8 The bidder must ensure that there are systems put in place to protect SASSA's personal information in terms of Protection of Personal Information Act, 2013.
 - 13.9 To coordinate and ensure that any outstanding cases are professionally managed and appropriately handed over to SASSA or its nominee prior / up on termination of contract.
 - 13.10 All pending cases should be completed with recommendations and submitted to SASSA within thirty (30) days prior to the end of the contract.
 - 13.11 The appointed service provider is required to ensure that all outstanding cases are fully resolved prior to the conclusion of the contract period. Additionally, SASSA shall refrain from submitting new cases during the final month of the contract.
 - 13.12 appointed service provider must finalize all outstanding cases prior to the end of the contracts and SASSA not to submit new cases in the last month of the contract
 - 13.13 The appointed bidder will be required to invoice the Agency after delivery of the service on a monthly basis, quoting the bid number, with full description of the actual services received by the Agency and the order number.

14 BID ENQUIRIES

Bidders to send enquiries and questions related to this bid to the following email address (healthrisk@sassa.gov.za) at least in six(6) working days and SASSA will respond in nine (9) working days after the bid advertisement.

The content of the email clearly indicates the following:

- Bid Ref number in the Subject Line of your e-mail
- The companies' name,
- Contact person and
- Telephone number

ANNEXURE A

NB: SASSA shall verify the contents of this list directly with the bidders' clients. Bidders are required to provide information as per the table below, and it will be the **ONLY ONE** used to evaluate bidders' experience and capability in rendering the specialized Health Risk Management Services.

NB: SASSA will verify information provided in Annexure A in part or in full and the process will not disadvantage any bidder in terms of achieving the maximum score during the evaluation process

TABLE OF EXPERIENCE

CURRENT AND PREVIOUS CONTRACTS (CLIENT BASE)

Bidder must provide a list of contracts that were successfully rendered and which are in line with Health Risk Management services.

Name of the organisation where Health Risk Management services has been rendered/implemented	Contract period (indicate start and end dates) e.g. 1 April 2021 to 31 March 2024	The total number of employees within the organisation	Client's Physical Address including name of the province	Contact persons details; designation; telephone numbers and email address of your client

ANNEXURE B: PRICING SCHEDULE

	Type of Assessment	Unit Price	Turnaround time
Items	❖ Temporary Incapacity Leave for short periods per case (<29 days).	R.....	12 working days
	❖ Temporary Incapacity Leave for long periods per case (>30 days).	R.....	12 working days
	❖ Ill Health Retirement Assessment per case	R.....	90 working days
	❖ Secondary assessment per case where necessary	R.....	As and when required
	❖ Virtual training cost per session	R.....	As and when required
	TOTAL PRICE EXCL VAT	R.....	
	VAT	R.....	
	TOTAL PRICE INCL VAT	R.....	