

Terms of Reference

Request for Quotations (RFQ)

**Request to procure a service provider to provide an Employee Wellness Programme (EWP)
for a period of 36 months for Agrément South Africa**

RFQ Number	ASA 06/08/2024
Date of Issue	12 August 2024
Closing Date	19 August 2024
Closing Time	12h00pm
Submissions	procurement@agrement.co.za
Technical queries and Supply chain queries may be directed to:	procurement@agrement.co.za

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1. BACKGROUND

The Agrément South Africa Act was accented to by the Honourable President of the Republic of South Africa as Act No 11 of 2015 from 1 April 2017. Agrément South Africa was established as a Schedule 3A entity on 1 April 2017. The entity operates under a delegation of authority from the Minister of Public Works.

The main objectives are:

- To assure fitness-for-purpose of non-standard construction-related products and systems to specifiers and users.
- To support and promote integrated socio-economic development related to the construction industry in the Republic.
- To support and promote the introduction and use of certified non-standardized construction-related products or systems in the local or international market.
- To support policymakers in minimizing the risk associated with the use of non-standard construction-related products or systems; and
- To be an impartial and internationally acknowledged South African centre for assessing and confirming fitness-for-purpose of non-standard construction-related products or systems.

2. INVITATION FOR PROPOSALS

Agrément South Africa seeks to enhance employees' well-being by making resources available. As part of this initiative, ASA is inviting proposals from qualified and experienced service providers to provide the Employee Wellness Programme (EWP) for 36 months for 50 employees.

3. SPECIFICATIONS

ASA requests proposals and quotations from suitable suppliers to provide the **Employee Wellness Programme (EWP)** for 36 months for 50 employees.

4. SCOPE OF WORK

4.1 In conjunction with the HR unit, coordinate, monitor, and support the organizational employee wellness program over a three-year contract duration.

- a. All Staff should be registered with the relevant authorities per legislator compliance pertinent to the stipulated function.

5. SCOPE OF SERVICES

5.1 The fully managed Employee Wellness Programme must offer:

- 5.1.1 Services aligned with the National Health Calendar
- 5.1.2 Crisis and Trauma Management
- 5.1.3 Face-to-face Counselling
- 5.1.4 Psychological and Psychosocial Services
- 5.1.5 Management of HIV & AIDS and other chronic illness
- 5.1.6 Occupational Health of Employees.
- 5.1.7 Health and Life Management Services
- 5.1.8 Implementation of interventions to address trends identified in quarterly reports.
- 5.1.9 E-Care services online support services through intranet or internet.
- 5.1.10 Training of peer educators in promoting holistic wellness.
- 5.1.11 Marketing and Promotion of Employee Wellness Services.
- 5.1.12 Support and advise employees with chronic illness, occupational injuries and diseases, mental illness, and disability and ensure that the working environment is conducive and accommodating.
 - Coordination of 2 wellness days and 4 training interventions per year.

5.2 General Requirements:

- 5.2.1 The service provider must be an Employer Assistance Professionals Association of SA (EAP-SA) member.
- 5.2.2 The service provider must be multilingual, confidential, and have unlimited access to 24-hour, 7-day-a-week call centre support services.
- 5.2.3 A maximum of 8 personal counselling sessions per person per condition per year, per family member residing with the employee, close to his or her residence or place of work.
- 5.2.4 Critical incident management service that offers prompt and professional individual and group trauma debriefing and counselling services to employees exposed to trauma incidents. Critical incident management services must be provided within 12 to 48 hours of the incident.
- 5.2.5 Briefing and training of managers on wellness-related issues.
- 5.2.6 Implementing and promoting the Employee Wellness Customer-designed program to ensure all employees know what services they will receive from the wellness provider. **This will include the following:**

5.2.6.1 Consultancy to provide proper communication materials (brochures, booklet, and wallet cards)

- Organizational consultancy to ensure the effective implementation of the EWP.

5.3. Technical Specifications

5.3.1 Implementation

Sessions will be implemented at Agrément South Africa Offices to introduce the services to the employees of Agrément South Africa. The implementation session will be a complete marketing role that will create awareness about the process.

▪ Information

Timeous request for relevant information, including contact details, employee details, and their immediate dependants.

▪ Co-ordination

Annual set up for information sessions in consultation with ASA Corporate Services.

▪ Content of Implementation Sessions

The designated trainer will inform employees of:

- Appointed EW service provider.
- Services
- Procedures Confidentiality
- Toll-Free Number
- Eligibility
- Confidentiality
- Contact person.
- Accessibility

▪ Direct services roles and responsibilities

Only professional, qualified, registered clinicians and specialists will render services. Direct, confidential, and unlimited access to a 24-hour Life Management Service, comprised of Legal, Financial, and Family Care Services.

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5.3.6 Feedback

Submit a report to Agrément South Africa of any concerns or issues raised during the implementation process.

4.1.1 HIV and Aids Services

4.1.2 Annual VCT campaign

4.1.3 Pre and Post counseling

4.1.4 Support and referral

6. SUBMISSION OF PROPOSALS AND EVALUATION CRITERIA

4.2 Submission of procurement documents.

6.1.1 National Treasury's Central Supplier Database (CSD) report. It must be noted that no contract with a service provider will be entered if such a service provider is not registered on the CSD,

12.1.1 Completed and signed standard bidding documents, **SBD 4 and 6.1 forms.**

12.1.2 Signed General Conditions of Contract

12.2 Mandatory documents/ information:

6.2.1 Completed price schedule.

12.2.1 A valid Proof of registration with Employee Assistance Professional Association of South Africa (EAP-SA)

Please stipulate the following information regarding registration with Employee Assistance Professional Association of South Africa (EAP-SA) :

Questions:	Yes	No
1. Are you registered with the EAP-SA?		
Tick(X) on the applicable box. Please attach proof of Registration or a valid certificate for EAPA-SA.		

NB: Failure to meet the mandatory requirements on 6.2 above will disqualify the bidder.

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12.3 Evaluation

The test for the Technical and Functional threshold will include the following:

Technical Evaluation Criteria	Points Weightings
Method Statement and Approach	10
Company Profile & Reference Letters	15
Reference Letters	30
Qualification of the Project Leader	15
Experience and Qualifications of the Team	30
Total Weighting:	100
Minimum qualifying score required:	60

6.3.1 Phase 1: Technical Specification and Functionality Evaluation

The bids shall first be evaluated for functionality. A **minimum score of 60%** must be obtained on functionality before a proposal is considered for further evaluation. Details of the functionality scoring and how the points shall be allocated are as follows:

- Method Statement and approach**

Submit the method statement that is in line with the scope of work.

Questions:	Yes	No	Weighting
1. Do you have a method statement in line with the scope of work?			10
Tick the appropriate box below to indicate if you have the mentioned documents. Attach a copy of a method statement as per the scope of work. The methodology must have the following. • Clear timelines • Order of project activity • Project time frames			
a) Bidder failed to address all the points			=0 points
b) Bidder addressed 1 out of 3			=1 point
c) Bidder addressed 2 out of 3			=3 points

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d) Bidder addressed 3 out of 3		=5 points
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6 Company profile

Please stipulate the following information regarding the company profile:

Questions:	Yes	No	Weighting
1. Do you have an adequate updated company profile?			15
Tick the appropriate box below to indicate your years of experience in a respected field. Attach a brief company profile clearly indicating a minimum 5 years' experience in providing Employee Wellness Programme to clients.			
a) Less than 5 years' experience in providing Employee Wellness Programme			=0 points
b) 5 to 7 years of experience in providing Employee Wellness Programme			=3 points
c) More than 7 years of experience in providing Employee Wellness Programme			=5 points

7 Reference Letters

Questions:	Yes	No	Weighting
1. Do you have reference letters?			30
Tick(X) the appropriate box that is applicable. Attach at least 3 copies of reference letters of previous work or projects of a similar nature completed in the past 5 years. The reference letters from the clients must include the following: • Duration (start and end date). • company name. • company letterhead. • contact person. • contact telephone numbers. • Services description N/B: Reference Letters without the above inclusions will be automatically disqualified.			
(a) Less than 3 reference letters submitted			=0 point

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(b) 3 reference letters submitted		= 3 points
(c) 4 to 5 Reference letters submitted		= 4 points
(d) 6 and above reference letters submitted		= 5 points

8 Qualifications of the Project Leader

Please submit a copy of the qualifications of the Project Leader.

Questions:	Yes	No	Weighting
1. Do you have a project Leader with Qualifications as stipulated below?			15
Tick(X) the appropriate box that is applicable. Service providers must demonstrate that the project leader responsible for the EWHP service has the relevant qualifications. Attach a certified copy(s) of qualifications not older than 6 months			Score
(a) No formal Qualifications			=0 points
(b) National Diploma in Health Education/Psychology/Counselling/Social Work/Health and Wellness or related field			=1 points
(c) BTech degree in Health Education/Psychology/Counselling/Social Work/Health and Wellness or related field			=3 points
(d) Honours & master's degree in Health Education/Psychology/Counselling/Social Work/Health and Wellness or related field			=5 points

9 Experience, Qualifications and Registrations of the team.

Please submit CVs, qualifications, and Registrations with the relevant professional bodies.

Questions:	Yes	No	Weighting
1. Do you have the CVs, qualifications, and registrations of key personnel as stated below?			30
Tick(X) the appropriate box that is applicable. Submit CVs of key personnel indicating or demonstrating the number of years they have in providing similar services. In order to score points, the bidder must also attach certified copies of the qualifications and proof that the proposed personnel detailed below are registered with a relevant professional body.			
Professional Nurse - Attach Curriculum Vitae indicating a minimum of five (5) years' experience as a Professional Nurse.	Max Score		5

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- Attach Copies of relevant Qualifications (Certified copies of qualifications must not be older than 6 months). - The Professional Nurse must be registered with HPCSA / South African Nursing Council or relevant (Attach proof).		
a) Less than 5 years' experience		= 0 points
b) 5-6 years of experience		= 2 points
c) 7-8 years of experience		= 3 points
d) More than 8 years of experience		= 5 points
• Psychologist - Attach Curriculum Vitae indicating a minimum of five (5) years' experience as a Psychologist. - Attach Copies of relevant Qualifications (Certified copies of qualifications must not be older than 6 months). - The Psychologist must be registered with HPCSA / Psychological Society of South Africa or relevant (Attach proof).	Max Score	5
a) Less than 5 years' experience		= 0 points
b) 5-6 years of experience		= 2 points
c) 7-8 years of experience		= 3 points
d) More than 8 years of experience		= 5 points
• Occupational Therapist - Attach Curriculum Vitae indicating five (5) years' experience as an Occupational Therapist. - Attach Copies of relevant Qualifications (Certified copies of qualifications must not be older than 6 months). - The Occupational Therapist must be registered with the HPCSA /Occupational Therapy Association of South Africa or relevant (Attach proof).	Max score	5
a) Less than 5 years' experience		= 0 points
b) 5-6 years of experience		= 2 points
c) 7-8 years of experience		= 3 points
d) More than 8 years of experience		= 5 points

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• Legal Advisor - Attach Curriculum Vitae indicating five (5) years' experience as a Legal Advisor. - Attach Copies of relevant Qualifications (Certified copies of qualifications must not be older than 6 months). - The Legal Advisor must be registered with the Legal Practice Council/ SASLAW or relevant (Attach proof).	Max score	5
a) Less than 5 years' experience		= 0 points
b) 5-6 years of experience		= 2 points
c) 7-8 years of experience		= 3 points
d) More than 8 years of experience		= 5 points
• Financial Advisor - Attach Curriculum Vitae indicating five (5) years' experience as a Financial Advisor. - Attach Copies of relevant Qualifications (Certified copies of qualifications must not be older than 6 months). - The Financial Advisor must be registered with the Chartered Institute for Securities and Investments/ Financial Planning Association / National Association of Personal Financial Advisors or relevant (Attach proof).	Max score	5
a) Less than 5 years' experience		= 0 points
b) 5-6 years of experience		= 2 points
c) 7-8 years of experience		= 3 points
d) More than 8 years of experience		= 5 points
• Safety Officer - Attach Curriculum Vitae indicating five (5) years' experience as a Safety Officer. - Attach copies of relevant Qualifications (Certified copies of qualifications must not be older than 6 months). - The Safety Officer must be registered with the South African Institute of Occupational Safety and Health or relevant (Attach Proof).	Max score	5
a) Less than 5 years of experience		= 0 points
b) 5-6 years of experience		= 2 points
c) 7-8 years of experience		= 3 points

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d) More than 8 years of experience		= 5 points
Total Scoring	100	
Minimum Threshold	60	

The following formula will be used to convert the points scored against the weight:

$$Ps = \left(\frac{So}{Ms} \right) \times \text{weighting percentage for the section under consideration}$$

Where:

Ps = Percentage scored for functionality by bid under consideration

So = Total score of a bid under consideration

Ms = Maximum possible score

Service providers will be expected to achieve a minimum threshold score of **60%** in order to proceed to Phase 2.

15.1 Calculation of points

6.4.1 Please note for acquisitions below or equal to R50 Million, ASA evaluates these in terms of the 80/20 preference point system where: 80 points are allocated for price and 20 points will be awarded based on the specific goals.

Points for price will be calculated for all shortlisted service providers in accordance with the following formula:

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

Where:

Ps = Points scored for the price of the quotation under consideration

Pt = Price of the quotation under consideration

Pmin = Price of lowest acceptable quotation

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Preference points for the specific goals will be allocated as follows:

NO.	SPECIFIC GOALS ALLOCATED POINTS	PREFERENCE POINTS ALLOCATION	SUPPORTING EVIDENCE TO BE SUBMITTED
1.	SMMEs	10 points	A B-BBEE certificate / affidavit as supporting evidence
2.	>50% Black female ownership	5 points	- CSD report or, - Company registration certificate, as issued by the CIPC, clearly indicating the percentage shareholding of all owners
3.	>50% Black youth ownership	5 points	- CSD report, - Company registration certificate, as issued by the CIPC, clearly indicating the percentage shareholding of all owners, or - Identification Documentation of all owners

The final points will be calculated as follows:

CRITERIA	WEIGHTING POINTS
Price	80
Specific goal	20
TOTAL	100

ASA also reserves the right to investigate the bidder's financial position, previous contracts carried out, availability of skills or knowledge, existing workload, etc.

A recommendation for the award will then be formulated for approval by the relevant delegated authority.

16. TERMS OF CONTRACT AND SERVICE LEVEL AGREEMENT

Before the bid is awarded, the successful bidder must enter into a Service Level Agreement (SLA) with Agrément South Africa (ASA). The SLA shall form the contractual basis for delivering the service and how performance shall be measured. Contract extensions are at the sole discretion of ASA

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4 PRICE SCHEDULE

Item no	Item Description	Quantity	Frequency	Unit Of Measure	Rate	Total Price for 3 Years
01	Employee Wellness Programme (for 50 Employees)	3	Yearly	Sum	R	R
02	Training Interventions	12	Quarterly	Sum	R	R
03	Coordination of wellness days	6	Bi-annually	Sum	R	R
04	Implementation	1	Once-off	Sum	R	R
TOTAL AMOUNT (EXCL VAT)						
15% VAT						
TOTAL AMOUNT (ALL INCLUSIVE)						

NB: Your Rates must be inclusive of all costs

5 COPYRIGHT AND INTELLECTUAL PROPERTY RIGHTS.

9.1 Considering the fees paid, the service provider expressly assigns any copyright to ASA from the works the consultant produces while executing this contract. The consultant may not use, reproduce, or otherwise disseminate or authorize others to use, reproduce, or disseminate such works without prior consent from ASA.

10 . FINAL APPROVAL

10.1 ASA reserves the right not to accept the lowest bid. ASA also reserves the right to reject any proposals and/or not appoint any service provider.

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11. PROCEDURE FOR SUBMISSION OF PROPOSALS

- 11.1 All proposals must be submitted electronically to procurement@agrement.co.za.
- 11.2 Respondents must use the RFQ number as the subject reference when submitting their bids.
- 11.3 All documents submitted electronically via e-mail must be clear and visible.
- 11.4 All proposals, documents, and late submissions after the due date will not be evaluated.

NB: NO HARD COPIES OR PHYSICAL SUBMISSIONS WILL BE ACCEPTED

12. VALIDITY PERIOD OF THE PROPOSAL

- 5.2 Each proposal shall be valid for **three (3) months**, calculated from the closing date.

13. APPOINTMENT OF SERVICE PROVIDER

- 13.1 The contract will be awarded to the bidder who scores the highest total points during the evaluation process, except where the law permits otherwise.
- 13.2 Appointment as a successful service provider shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. If the parties fail to reach such an agreement, ASA reserves the right to appoint an alternative supplier.
- 13.3 Awarding of contracts will be announced on the National Treasury website, and no-regret letters will be sent to unsuccessful bidders.

14. ENQUIRIES AND CONTACT WITH ASA

- 14.1 Any inquiry regarding this RFQ shall be submitted in writing to ASA at procurement@agrement.co.za with RFQ No: ASA 06/08/2024 "Request to procure a service provider to provide an Employee Wellness Programme (EWP) for a period of 36 months for Agrément South Africa" as a subject.
- 14.2 Any other contact with ASA personnel involved in this Quotation is not permitted during the RFQ process. The RFQ process is not required through existing service arrangements or as requested by ASA as part of the RFQ process.

5 MEDIUM OF COMMUNICATION

- 5.3 All documentation submitted in response to this RFQ must be in English.

16. COST OF PROPOSAL

- 5.3 Tenderers are expected to fully acquaint themselves with the conditions, requirements, and specifications of this RFP before submitting proposals. Each bidder assumes all risks for resource commitment and direct or indirect expenses of proposal preparation and participation throughout the RFP process. ASA is not directly or indirectly responsible for any costs incurred by tenderers.

17. CORRECTNESS OF RESPONSES

- 17.1 The bidder must confirm satisfaction regarding the correctness and validity of their proposal and that all prices and rates quoted cover all the work/items specified in the RFP. The prices and rates quoted must cover all obligations under any resulting contract.
- 17.2. The bidder accepts that any mistakes regarding prices and calculations will be at their own risk.

18. VERIFICATION OF DOCUMENTS

- 18.1 Bidders should check the numbers of the pages to satisfy themselves that none are missing or duplicated. ASA will accept no liability concerning anything arising from the fact that pages are missing or duplicated.
- 18.2 Only one electronic copy of the proposal must be submitted via email to procurement@agrement.co.za. If the bidder sends more than one proposal, the first submission shall take precedence should it have yet to be recalled/withdrawn in writing by the bidder.

19. ADDITIONAL TERMS AND CONDITIONS

- 19.1 A tenderer shall not assume that information and/or documents supplied to ASA, at any time before this request, are still available to ASA, and shall consequently not make any reference to such information document in its response to this request.
- 19.2 Copies of any affiliations, memberships, and/or accreditations that support your submission must be included in the tender.
- 19.3 An omission to disclose material information, a factual inaccuracy, and/or misrepresentation of fact may result in the disqualification of a tender or cancellation of any subsequent contract.
- 6.1 Please comply with all the terms and conditions in this document to ensure the proposal is valid.

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20. ASA RESERVES THE RIGHT TO;

- 20.1 Extend the closing date.
- 20.2 Verify any information contained in a proposal.
- 20.3 Request documentary proof regarding any tendering issue.
- 20.4 Appoint one or more service providers, separately or jointly (whether they submitted a joint proposal).
- 20.5 Award this RFQ as a whole or in part.
- 6.1 Cancel or withdraw this RFQ as a whole or in part.

21. DISCLAIMER

This document is only an RFQ is a request for proposals only and not an offer document. Answers to this RFQ must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submitting this proposal, tenderers shall be deemed satisfied with and accept all Terms & Conditions of this RFQ. ASA makes no representation, warranty, assurance, guarantee, or endorsement to the tenderer concerning the RFQ, whether its accuracy, completeness or otherwise. ASA shall have no liability towards the tenderer or any other party in connection.

22. POPIA

Protection of Personal Information - All bidders agree that personal information of persons related to or linked with bidders or respondents to this request for proposals may be required to fulfil the requirements for submitting a bid. All bidders agree that the ASA may collect, keep and process such information provided that the aforesaid uses shall be for purposes of evaluating the bid submitted. Where the information is sought to be used for other purposes, further and specific consent shall be obtained.