
TERMS OF REFERENCE

RFQ NUMBER : DSBD EHWP 006 (2021/2022)

DATE OF ISSUE : 14TH OCTOBER 2021

CLOSING DATE AND TIME : 3RD NOVEMBER 2021

BID VALIDITY PERIOD : 120 DAYS

SUBMISSION ADDRESS:

Supply Chain Management

77 MEINTJIES STREET

3rd FLOOR, BLOCK G

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SUNNYSIDE

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2. DEFINITION OF TERMS

#	TERM	DEFINITION
2.1	Psycho-Social	The combined influence that Psychological factors (internal/mental being) and the surrounding social environment (external demands) have on their physical and mental wellness and their ability to function.
2.2	Immediate Family	Married – Spouse and Children Unmarried – Universal Partner and Children
2.3	Clinical Social Worker	A professional who provides mental health services for the prevention, diagnosis, and treatment of mental, behavioural, and emotional disorders in individuals, families, and groups. Their goal is to enhance and maintain their patients' physical, psychological, and social function.
2.4	Counselling	The provision of professional assistance and guidance in resolving personal or psychological problems.
2.5	Trauma Debriefing	A counselling method aimed at preventing the development of/ reducing the occurrence of certain anxiety disorder and Post Traumatic Stress Disorder (PTSD). Trauma Debriefing is used/ facilitated with people who have been exposed to traumatic event/s.
2.6	Clinical Psychologist	A mental Health professional who integrates science, theory and clinical knowledge for the purpose of understanding, preventing and relieving psychologically based distress or dysfunction and to promote wellbeing and personal development.
2.7	Educational Psychologist	Focuses mainly on human learning processes, form both cognitive and behavioral perspectives. Focus is also on individual differences in intelligence, cognitive development, affect, motivation, self-concept, self-regulation and their role in learning.
2.8	Counselling Psychologist	Specializes in Counseling, Career Development, supervision training, prevention, health, individual strengths, person-environment interactions, educational developments and intact personalities.

2.9	Specialist Psychiatrist	A Medical Doctor specializing in Psychiatry- the branch of medicine devoted to the diagnosis, prevention, study and treatment of mental disorders.
2.10	Universal Partner	A partner with which an employee agreed to put in common all his/her property. Not only what they then have, but also what they shall acquire.
2.11	eCare Services	An electronic information system that employees could access and interact to in relation to health and wellness information.

3. ABBREVIATIONS

ABBREVIATION	DESCRIPTION
BAC	Bid Adjudication Committee
B-BBEE	Broad-Based Black Economic Empowerment
BEC	Bid Evaluation Committee
CV	Curriculum Vitae
CSD	Central Supplier Database
DPSA	Department of Public Service and Administration
DBSD	Department of Small Business Development
DG	Director General
EHWP	Employee Health & Wellness Programme
EHWC	Employee Health and Wellness Committee
GCC	General Conditions of Contract (GCC)
HPCSA	Health Professions Council of South Africa
HPA	Health Professions Act, No 56 of 1974
PERSAL	Personnel and Salary System
PFMA	Public Finance Management Act, No 1 of 1999
POPI	Protection of Personal Information Act No 4 of 2013
SACSSP	South African Council for Social Service Professions
SARS	South African Revenue Services
SCM	Supply Chain Management
ToR	Terms of Reference
VAT	Value Added Tax

4. PURPOSE

- 4.1 The purpose of the bid is to invite proposals from service providers registered with either Health Professions Council of South Africa (HPCSA) and / or the South African Council for Social Service Professions (SACSSP) to render Employee Health and Wellness services to the DSBD employees and their immediate family members for a period of three (3) years.

5. BACKGROUND

- 5.1 **The DSBD** is a Government department currently with 209 employees which is not fixed. Employment relationships are governed by the provisions of the Public Service Act, 1994 (as amended) and the Public Service Regulations as administered by the Department of Public Service and Administration (DPSA).
- 5.2 Within the HRM unit, is the Employee Health and Wellness Programme (EHWP) whose vision is to (1) identify and facilitate the removal of impediments to a healthy workforce, (2) improve the employees' quality of work life as well as to (3) create an environment that facilitates a holistic approach to the growth and wellness of **the DSBD** employees. The core objective of the EHWP is, therefore, to promote the holistic wellbeing of **the DSBD** employees in relation to the working environment.
- 5.3 Furthermore, **the DSBD** seeks to synchronise employee well-being and organisational needs to ensure that employees are motivated to perform on the objectives of **the DSBD**. In order to perform this function, EHWP is to provide **the DSBD** employees with psycho-social counselling in order to cope with daily challenges and to improve the quality of their lives. Added to the counselling programme is the eCare services, which is an electronic information system that enables employees to access and interact in relation to health and wellness information.
- 5.4 In view of the above, the successful service provider must (1) provide EHWP services to a total of about 209 employees (permanent employees, interns, and contract employees); (2) Face-to-face counselling services to **the DSBD** employees as well as immediate family members; and (3) The eCare programme only to **the DSBD** employees (System must be compatible with **the DSBD** ICT infrastructure. Specifications on **the DSBD** ICT infrastructure is available on request).

6. PRINCIPLES

- 6.1 The Employee Health and Wellness Programme is underpinned by the following principles:

- a) **Only registered professionals** {i.e., registered with either Health Professions Council of South Africa (HPCSA) and / or the South African Council for Social Service Professions (SACSSP)} will be allowed to provide therapeutic interventions. This includes psychologists, registered counsellors and social workers with 3 to 5-year experience in counseling
- b) As far as possible the generic principles of respect for autonomy, non-maleficence, beneficence, and distributive justice will guide the actions of all professionals providing the counselling service.
- c) Employees utilising the Wellness Programme are assured of Confidentiality, except in cases of risk to self and others or in terms of legislation. The Service Provider must ensure compliance to the Protection of Personal Information Act (POPI) Act no 4 of 2013 and the Health Professions Act (HPA), act no 56 of 1974.
- d) The programme focuses on all levels of employment and responds to the needs of designated employees (e.g., people with disabilities and women) maintaining a performance focus.
- e) *Coherence of models*: the service delivery models should offer the same package of professional service to **the DSBD** employees and their immediate family members.
- f) *Voluntary Participation*: Employees and their immediate family members' participation in the programme is voluntary.

7. SCOPE OF WORK

7.1 Applicability of scope

- 7.1.1 The Programme shall be open to all employees and members of their immediate families, and available and accessible irrespective of their geographical area (location), where they may be, due to official duties, through:
- 7.1.2 The Programme shall allow for **Self-referral** (i.e., where the employee seeks professional help on their own) or **Informal referral** (i.e., where a supervisor, friend or co-worker recommends EHWP).
- 7.1.3 Programme shall allow for **Formal referral** based on job performance and recommendation by a supervisor.

NB: The Service Provider is required to as far as possible, utilise Counsellors who are available in at least the two major centres (Pretoria and Cape Town) and in close proximity of the relevant DSBD offices.

7.2 Services to be provided

7.2.1 The Service Provider is expected to design, implement, and manage the Employee Health and Wellness Programme with the following deliverables:

7.2.1.1 Develop a workplace psycho-social counselling and eCare programme.

7.2.1.2 Provide a counselling service in all 11 official languages and also in sign language.

7.2.1.3 Develop and implement a marketing strategy to advertise and market the programme in consultation with **the DSBD's** Communications & Marketing unit and with the EHWP.

7.2.1.4 Provide a toll-free number for employees to phone and must be accessible 24/7/365 with a call-back service.

7.2.1.5 Provide a client utilisation report and also report on trends and recommendations on a monthly, quarterly, biannually, and annual basis; and,

7.2.1.6 Implement quarterly workshops based on the trends and issues emanating from the counselling and eCare services.

7.2.1.7 In conjunction with the EHWP manager, identify and implement Health and Wellness activities / events as per the National Health Calendar.

7.2.2 Counselling

7.2.2.1 Provide a generic counselling service in all the official languages, including deaf people.

7.2.2.2 Provide trauma debriefing within 48 hours (individual and/or group) of an incident; Provide trauma management services.

7.2.2.3 Render a telephonic as well as face-to-face counseling service to employees and immediate family members in both Pretoria and Cape Town offices

7.2.2.4 Telephonic counselling should be unlimited. Physical visit to be conducted by the DSBD to the service provider work premises, to ascertain (to conduct due diligence) availability of the call center and

7.2.2.5 Provide monthly Telephone Management System should be in place to track calls and employees who consulted and provide call track ration – i.e., how long does employees hold to get an answer.

7.2.2.6 Face-to-face counselling should be at a maximum of six (6) sessions per problem per employee/family member and referral to a relevant specialist thereafter.

7.2.2.7 All face-to-face referrals shall be approved by the Wellness Manager to ensure that all internal arrangements pertaining to attendance of sessions and leave is addressed before hand.

7.2.2.8 Provide management consultations, interventions, and coaching; and

7.2.2.9 Provide management support in relation to formal referrals.

7.2.3 eCare

- 7.2.3.1 In consultation with the Chief Information Officer, provide an interactive web-based site with recent and relevant research on health and wellness issues for employees to interact with.
- 7.2.3.2 On the 11th of every month, provide an eCare newsletter relating to health and wellness.
- 7.2.3.3 On a monthly basis, provide a total of 209 hard copies of articles on health promotion and education (this should include a combination of A4 and A3 paper / poster size) as well as monthly electronical articles, as per the National Health Calendar or, as per the need of the DSBD.
- 7.2.3.4 Register, individualise and provide a status report to employees who profile themselves on the eCare platform.
- 7.2.3.5 Send profiled employees health updates as well as updates to track their progress; and
- 7.2.3.6 Provide access for employees to interact with a general practitioner, fitness instructor and dietician.

7.2.4 Life Management Services

- 7.2.4.1 Render a legal advisory service and not in conflict with the organisation.
- 7.2.4.2 Provide personal financial counselling; and
- 7.2.4.3 Render an information and directory service.
- 7.2.4.4 Assist employees with the South African Revenue Service (SARS) tax return support services.

7.2.5 Reporting

- 7.2.5.1 Provide quarterly, biannual, and annual reports and present such to all management fora in the DSBD
- 7.2.5.2 Reporting must be integrated of all the services rendered.
- 7.2.5.3 Reports to include trends as well as recommendations.
- 7.2.5.4 Conduct a customer satisfaction survey on an annual basis, on the services rendered.

7.2.6 Training and development

- 7.2.6.1 Provide facilitation/presentation for a quarterly 4-hour workshop based on the trends emanating from the counselling service or as per the needs identified through other programmes within **the DSBD**.
- 7.2.6.2 Workshops must include education on life skills so that employees could develop and enhance their coping skills.

7.2.7 Group interventions (on a needs basis)

7.2.7.1 Provide group interventions on a need basis.

7.2.7.2 Group interventions, unlike trauma debriefing, should focus on intervention, group support and team development / cohesion and sustenance, including inter and intrapersonal skills development: and

7.2.7.3 Group interventions should include assessment, group facilitation and recommendations.

7.2.7.4 Employee morale boosting services – this should include workshops aimed at inspiring / reviving employees' work spirit to enhance job productivity.

7.2.8 Advertising and marketing

7.2.8.1 Develop and implement a marketing and communication strategy and plan for employees, management, supervisors, and the labour unions in the form of awareness programmes; electronic mail/media; pamphlets; brochures; leaflets; posters; exhibitions and provide an annual program of planned wellness activities and the related costs. Conduct communication session with **the DSBD** staff and Line Managers, introducing EHWP and benefits for outsourced services.

7.2.8.2 Conduct presentations on the EHW services at the monthly induction programme or as per the need of the DSBD.

7.2.8.3 In consultation with the DSBD's Communications & Marketing unit, develop and implement a marketing and communications plan at inception, annually and for when the utilisation rate is low.

7.2.8.4 At inception of the project and thereafter annually, provide marketing material to market the EHW services.

7.2.8.5 Monitor and evaluate marketing trends: and

7.2.8.6 Provide health promotion and education pamphlets/ material to be distributed through the Exhibition table and notice boards.

7.2.9 Project management to ensure success

7.2.9.1 Develop and submit a project charter to the manager EHW.

7.2.9.2 Develop a monitoring and evaluation system.

7.2.9.3 Invoices for services rendered must be submitted monthly before the 7th of every month to Supply Chain Management for the attention of Mr Lebogang Papale at lpapale@dsbd.gov.za. Payment will be made within 30 days of submission of the invoice.

7.2.9.4 Provide a professional 24/7/365 toll-free number so that employees could be directed to a counsellor and render a call-back service.

7.2.9.5 The DSBD project team to be informed of the content of the monthly eCare newsletter upfront.

8. OBLIGATION OF THE DSBD

8.1 The DSBD will be responsible for the following logistical arrangements:

8.1.1 Meeting/ Consultation /Counselling rooms if required.

8.1.2 Co-ordination of respondents / role players for group intervention, including provision of transport to consult with a counselor when necessary.

8.1.3 Marketing of the project.

8.1.4 Co-ordinate participation in the survey as well as project meetings.

8.1.5 Coordinate presentations and workshops as well as venues.

8.1.6 Provision of all reports and data relevant to the project; and

8.1.7 Effect payment for service rendered within thirty (30) days after invoicing.

9. Financial Viability

9.1 It is expected that the service provider shall provide audited/certified financial statements and/or bank statements on an annual basis as support and evidence of their financial sustainability for the duration of the contract.

9.2 The DSBD will use the per capita financial model, whereby monthly payment is made to the service provider, irrespective of whether the services used by employees and or immediate family members or not.

	Costing per main element of the proposed programme: (This pricing should be in line with SBD 3.3)			
	NB: please note that consultancy fees must be in line with the DPSA approved rates for consultants			
NR	ACTIVITY	PAX / NR OF EVENTS	COSTING EXCLUDING VAT	COSTING INCLUDING VAT
1	Clinical and Professional Support Life Services for employees (24/7/365 via standard toll-free line–Unlimited access) Confidential Telephonic Counselling	As per need to a total of 209 employees and their immediate family members	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 1(209 employees)				
2	Life Management Services Financial Advice Legal Advice Family Care Support	Per need, to 209 employees and their immediate family members	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 2 (209 employees)				
3	Telephonic Health & Medical Support Services - COVID-19 Support - Health Coaching & Health Risk Management - HIV/AIDS Counselling and Support - Referral To Existing Company Services Such as Medical Aid/On-site Clinics	As per clients need	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 3 (209 employees)				

	Costing per main element of the proposed programme: (This pricing should be in line with SBD 3.3)			
	NB: please note that consultancy fees must be in line with the DPSA approved rates for consultants			
NR	ACTIVITY	PAX / NR OF EVENTS	COSTING EXCLUDING VAT	COSTING INCLUDING VAT
4	Musculoskeletal Health Management - Telephone Assessment & Guided Self-Management Comprehensive Absence Management - First Day Absence Reporting and Management *Data Analysis, Absence Referrals and Management, Sick Note Verification	As per clients need	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 4 (209 employees)				
5	Onsite Group Trauma and Crisis Intervention	3 onsite / online trauma interventions per year	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 5 (209 employees)				
6	Managerial Consultancy and Referral Services - Comprehensive briefing and training for managers/supervisors/team leaders - and HR specialists - Managerial Referral - Custodian Referral	As per clients need	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 6 (209 employees)				

	Costing per main element of the proposed programme: (This pricing should be in line with SBD 3.3)			
	NB: please note that consultancy fees must be in line with the DPSA approved rates for consultants			
NR	ACTIVITY	PAX / NR OF EVENTS	COSTING EXCLUDING VAT	COSTING INCLUDING VAT
7	Marketing and Communication Digital Collateral (APP) and Printed Collateral (Poster, Brochures, Wallet Cards), USSD Communication Services.	Continuous - Weekly, bi-weekly	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 7 (209 employees)				
8	Face to Face Counselling / Individual Support Interventions Short-term, problem focused and solution orientated counselling Services available in all 11 South African official languages	Indicate costing per unit R _____/per employee	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 8 (209 employees)				
9	Online Health and Wellness Programme Health Education and Promotion – observance of National Department of Health - Health Calendar	Indicate cost per unit here (per health calendar observance dates)	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 9 (209 employees)				

	Costing per main element of the proposed programme: (This pricing should be in line with SBD 3.3)			
	NB: please note that consultancy fees must be in line with the DPSA approved rates for consultants			
NR	ACTIVITY	PAX / NR OF EVENTS	COSTING EXCLUDING VAT	COSTING INCLUDING VAT
10	Training and Development Employee Quarterly Training – Life Skills empowerment (Virtual topic talks)	Indicate costing per training session unit (hrs/ consultant) 4 training sessions per year for 2 hours	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 10 (209 employees)				
11	Group interventions - Conflict resolution / emotional impact / debriefing sessions – Team development and sustenance (DSBD Units / branches) - Intrapersonal and interpersonal relationships/ skills empowerment - Emotional intelligence - Effective Communication Skills.	6 group sessions per year - maximum duration of 2 hours per session.	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 11 (209 employees)				
12	Reporting Quarterly Reporting Annual Reporting	4 quarterly reports per year for 3 years (2 reports for the first year – already on 3 rd quarter of current financial year) One annual report – for 3 years	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 12 (209 employees)				

	Costing per main element of the proposed programme: (This pricing should be in line with SBD 3.3)			
	NB: please note that consultancy fees must be in line with the DPSA approved rates for consultants			
NR	ACTIVITY	PAX / NR OF EVENTS	COSTING EXCLUDING VAT	COSTING INCLUDING VAT
13	Programme Management Client support services team On-going awareness sessions Monthly Digital Drops	Ongoing, and as per client's needs	Year 1:	Year 1:
			Year 2:	Year 2:
			Year 3:	Year 3:
COSTING SUB-TOTAL FOR 13 (209 employees)				
Costing Grand Total Fee for 3 years on 209 employees excl. VAT				
Costing Grand Total Fee for 3 Years on 209 employees Incl. VAT				

10. PROSPECTIVE SERVICE PROVIDER RESPONSE TO THE REQUEST FOR PROPOSAL (RFP)

10.1 The prospective service provider must submit a written proposal that will include the following:

10.1.1 A detailed project plan, including methodology and approach as to how these services will be rendered. The detailed project plans must include:

10.1.1.1 How the counselling and eCare services will be conducted and how the project will be managed and by whom.

10.1.1.2 A database of all the professionals who will be offering the counselling services and an indication of their qualifications, knowledge, skills, and previous experience. Proof of qualifications of people to implement and manage the eCare programme.

10.1.1.3 What resources the organisation has to render these services effectively.

10.1.1.4 The organisation's previous experience in implement a psycho-social counselling and eCare service and its deliverables mentioned above.

10.1.1.5 Method of reporting on a monthly, quarterly, and annual basis and what the information can be used for; and

10.1.1.6 Available infrastructure in terms of capacity and systems to render these services.

10.1.1.7 Demonstrated knowledge of EHW including workplace HIV and AIDS programmes as well as web-site design and content management.

10.2 The service provider must include a list of at least seven (7) client organisations where similar services were provided and their contact numbers for reference purposes.

10.3 A response to each element in the evaluation matrix of not more than two (2) pages per element must be prepared and you may include annexures. Failure to address each element of the matrix will be perceived as non-compliance with the contract conditions and will thus invalidate your proposal.

10.4 The proposal should have one price as per the SBD 3.3.

11. EXPERIENCE AND QUALIFICATIONS

11.1 Prospective bidders must have a minimum of 5 years' relevant experience in the EHW field and should be able to demonstrate involvement in similar/relevant programmes.

11.2 The service provider must submit names of qualified counsellors who are either registered with the Health Professions Council of South Africa (HPCSA) as Clinical/Educational/Counselling Psychologists or with the South African Council for Social Service Professions (SACSSP) as Social Workers and who will be allocated to the DSBD eCare project for the duration of this contract.

11.3 Failure to comply with 7.1 and 7.2 will be perceived as non-compliance with the contract conditions and will invalidate the bid.

11.4 Only bidders who have experience with similar projects and have met the minimum requirements of the project will be considered in the evaluation process.

12. PROPOSALS

12.1 Bid documents may be couriered to the aforesaid address on or before the closing date and time. For hardcopy deliveries, arrangements **must** be made on time via email with Ms Rudzani Matodzi at rmatodzi@dsbd.gov.za

12.2 Bid documents will only be considered if received by DSBD before the closing date and time, regardless of the method used to send or deliver such documents to DSBD. Bids received after the closing date and time will be disqualified.

12.3 The following format must be adhered to when bid documents are submitted, be it arranged hand (i.e., as per appointment) delivery at 77 Meintjies Street, Block G, 3rd Floor, the dtic Campus or uploading on OneDrive link (**to be provided with the tender documents**):

12.3.1 Folder 1 or Annexure A: Standard Bidding Documents (SBD), i.e., SBD 4, SBD 6.1, SBD 8; and SBD 9; Certificate of Compliance (Industry Associations or Accreditation) where applicable.

12.3.2 Folder 2 or Annexure B: Pricing Schedule (SBD 1 and 3.3)

12.3.3 Folder 3 or Annexure C: Functional Proposal

12.4 For hand delivery, bidders are required to submit one (1) original plus a USB properly labelled as per 6.1 above.

12.5 All enquiries must be directed to SCM at dsbdtenders@dsbd.gov.za

12.6 FAILURE TO SUBMIT THE INFORMATION AS REQUESTED ABOVE WILL RESULT IN THE INVALIDATION OF A PROPOSAL.

13. EVALUATION CRITERIA AND PROCESS

13.1 The evaluation of bids will be conducted in four (4) separate phases as outlined below:

13.1.1 Phase 1: Preliminary Evaluation (Compliance Evaluation)

13.1.1.1 To be conducted by SCM to confirm compliance and completeness of documents, i.e., Tax compliance, complete SBD forms (SBD 1; SBD 4; SBD 6; SBD 8 and SBD 9) and other documentation that might have been required for the tender (e.g., certification of professional bodies).

13.1.1.2 DSBD may request clarification or further information regarding any aspect of the bid, e.g., update of the Tax Compliance status where a bidder is non-tax compliant on the closure of the tender or incomplete). The bidder must supply the requested

information **within 7 days (tax compliance) or within 3 days (Incomplete SBD Forms)** after the request has been made otherwise the bid will be disqualified.

13.1.1.3 Only those proposals whose compliance is in order will move to Phase 2

13.1.2 Phase 2: Functional Proposal

13.1.2.1 The second phase will be the evaluation to determine the capability of the service provider to deliver on the specified requirements. The following key score shall be applied for the evaluation on functionality. Only service providers that score 70% out of 80 points (56 points) and above on functionality will go through to Phase 3.

0	1.	2.	3.	4.	5.
Non responsive	Poor (significantly below requirements)	Inadequate (below requirements)	Good (meets requirements)	Very good (above requirements)	Excellent (significantly above requirements)

Functional Criteria	Weight	Key score (0-5)
1. EXPERIENCE	15	
Service provider must have a minimum of five (5) years' experience in EHW implementation (Proposal to include proof of delivering similar projects i.e.,		
10 years + = 5		
6 -9 years + = 4		
5 years + = 3		
2. REFERENCES	5	
Service provider must have a minimum of seven (7) references in EHW implementation Reference letters MUST include the following, main details:		
1. Recent contracts and periods in the last 3 years		
2. Value of contracts		
3. Contact person etc.		
4. Reference letters to be on Organisation's letterhead and signature		

Functional Criteria	Weight	Key score (0-5)
10 years+ = 5		
8 to 10 years = 4		
7 References = 3		
3. METHODOLOGY	60	
Proposed detailed delivery methodology in accordance with DSBD prescribed standards (service provider must include a proposed counselling and intervention programme, an implementation plan and detailed project plan and indicate the intended EHW management methodology in the proposal)		
a) Proposed methodology including proposed counselling and intervention programme, an implementation plan and detailed project plan and indicate the intended EHW management methodology in the proposal) that shows how the improvements will be realised	5	
b) Proposed methodology and proposed counselling and intervention programme, an implementation plan and project plan	4	
c) Proposed methodology with no plans and improvements	3	
4. COMPETENCY OF THE PROJECT MANAGER Extensive Project Management Skills (Provide CV of the proposed team with at least 5 years implementation experience)	20	
Project Management implementation experience		
10 years + = 5		
6 - 9 years = 4		
5 years = 3		
Total	100	

13.1.3 Phase 3: Presentations and Interviews

13.1.3.1 Bidders that score 70% out of 20 points (14 points) and above in the Phase 2 will be given an opportunity to make a PowerPoint presentation on their proposed project, duration, benefits, methodology and implementation plan as well as also outline key responsibilities etc.

13.1.3.2 The presentation must be aligned with the criteria as outlined below. The Bid Evaluation Committee (BEC) will interview bidders following the presentation should any clarity be required on the Proposal.

13.1.3.3 Presentations will be evaluated on the criteria below and will be rated on a scale of 1-5.

#	Functional Criteria	Weight
1	Effective Response to the Scope of the Work and Requirements	3
2	Methodology and approach	4
3	Demonstrate knowledge and experience in the EHW field as well as how the project will be implemented in the DSBD	5

13.1.4 Phase 4: Price and BEE Status Level of Contribution

13.1.4.1 Only bidders that score a combined **70% out of 100 points on Functionality i.e., 70 points and above** will be considered on this phase which will determine the bidder (s) to be recommended for approval by the delegated authority. The 80/20 Preference points system will be applied using the below formula to calculate price:

The following formula will be used to calculate the points for price: Criteria	Points
Price Evaluation $Ps\ 80 \left(1 - \frac{Pt - P\ min}{P\ min} \right)$	80

Where,

Ps = Points scored for comparative price of bid under consideration

Pt = Comparative price of bid under consideration

Pmin = Comparative price of lowest acceptable bid

13.1.4.2 In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points will be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table as set out in the Preference Points Claim Form (SBD 6).

B-BBEE Status Level of Contributor	Number of Points
1	20
2	18
3	16
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

14. CONDITIONS OF CONTRACT

14.1 Please note that the General Conditions of Contract (GCC) shall be applicable.

14.2 The bid must be signed by authorised official in your consultancy firm.

15. MONITORING AND EVALUATION

15.1 **The DSBD** and successful Bidder will set up systems and procedures for monitoring, and evaluation of the project.

16. RISK MANAGEMENT

16.1 The project will be implemented in line with the departmental budgetary constraints that may necessitate re-prioritization.

17. COMMUNICATION

18.1 Stakeholders and role players will be informed on the progress of the project on a monthly basis through submitted reports and attendance registers and possible presentation sessions conducted to relevant DSBD committees.

18. CONTACT DETAILS

18.1 Tender enquiries

18.1.1 The email address to which tender and/or related questions of clarity must be submitted is dsbdtenders@dsbd.gov.za

18.2 Technical Enquiries (Programme Manager):

Name: Dr Shirley Maabela

Telephone Number: 012 394 1635 / 082 658 9012

Email: SMaabela@dsbd.gov.za

ANNEXURE A

Please note this checklist must be completed and submitted together with the **Financial Proposal** (Envelope 2)

Document that must be submitted	Non-submission may result in disqualification?	
Invitation to Bid – SBD 1	YES/NO	Complete and sign the supplied pro forma document
Tax Status	YES/NO	i. Proof of Registration on the Central Supplier Database (Refer Section 4.1.5) ii. Vendor number iii. In the event where the Bidder submits a hard copy of the Tax Clearance Certificate, the CSD verification outcome will take precedence.
Pricing Schedule-SBD 3.3	YES/NO	Complete and sign the supplied pro forma document
Declaration of Interest – SBD 4	YES/NO	Complete and sign the supplied pro forma document
Preference Point Claim Form – SBD 6.1	YES/NO	Non-declaration and non-submission of the Sworn Affidavit and a valid BEE Certificate issued by a SANAS Accredited supplier will lead to a zero (0) score on BBEE
Declaration of Bidder's Past Supply Chain Management Practices – SBD 8	YES/NO	Complete and sign the supplied pro forma document
Certificate of Independent Bid Determination – SBD 9	YES	Complete and sign the supplied pro forma document
Registration on Central Supplier Database (CSD)	NO	The Service Provider must be registered on the CSD. If you are not registered proceed to complete the registration of your company prior to submitting your proposal. Visit https://secure.csd.gov.za/ to obtain your vendor number. Submit proof of registration.
Functional Proposal including Mandatory documents (Envelope 1)	YES	Submit a functional proposal in line with the Terms of Reference including the SBD documents above.
Pricing Schedule (Envelope 2)	YES	Submit full details of the pricing proposal

ANNEXURE B

The below checklist must be completed and submitted together with the **functional proposal (Envelope 1)**

CRITERIA	YES	NO	N/A
Did the service provider include the cover page with company name, address and contact person(s) and contact details?			
Did the service provider indicate company background i.e., history, strengths, experience, size, and client list?			
Did the service provider include Proof of accreditation certification?			
Did the service provider include CV, profile and relevant qualification(s) of the proposed Project Team Member (s)?			
Did the service provider provide include Three (3) references of organisations similar in magnitude and profile where Employee Health and Wellness (EHW) Programme was implemented by the Project Team Member (s)?			
Did the service provider include a detailed project plan in their proposal?			
Did the service provider include the experience of the Project Team Member (s)?			

ToR Approved

YES

☐

NO

☐

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NOMONDE MNUKWA
CHIEF DIRECTOR: CORPORATE MANAGEMENT
Date:

