



SCM /Tender Ref #:	DPME 17/2022- 2023
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Request for proposals for:	Employee Health & Wellness Services for the Department of Planning Monitoring and Evaluation for the period of 3 years (36 months)
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Bid closing date and time as well as the date and time of compulsory briefing session as indicated on the attached SBD1. Quotations / proposals received after the closing date and time indicated on SBD 1 will not be accepted.

Bidders must provide one original and 4 (four) copies of proposals submitted.

Only 1 (one) original price proposal and SBDs are required.

Estimated project start date:	Expected project duration (Months)
1 July 2023	36

1. BID INFORMATION refer to Annexure A

Information and guidelines on the format and delivery of bids are contained in the attached bid documents. Please take note of the closing date and date of compulsory briefing session.

2. PROPOSAL FORMAT

A detailed proposal in response to this ToR must be submitted. The proposal should contain all the information required to evaluate the bid against the requirements stipulated in this terms of reference. The following must be attached to the proposal as annexures:

- **Annexure B1:** Proposed team (Must use attached Excel template).
- **Annexure B2: Contactable references**
- **Annexure B3:** Pricing information. Price proposals must include VAT and should be fully inclusive to deliver the all outputs indicated in the terms of reference (Must use attached Excel template).
- The published terms of reference (this document, including Annexure A to this document).
- All other forms / certificates required (see bid documents).

3. CONDITIONS OF BID

Detailed conditions applicable to all bids are contained in the bid documents accompanying this Terms of Reference. Only suppliers that meet all the requirements stipulated in the terms of reference and bid documents will be considered.

No late bids will be accepted. Only bids from service providers that attended the compulsory briefing session will be considered. Bids must be valid for a minimum period of 120 days after the closing date.

ENQUIRIES	Technical	SCM
Name:	Ms. Mmatshupo Motlhabane	Mr Aubrey Ramalobela
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4. BACKGROUND

Annexure A contains a detailed description of the requirements for this project, including:

- Background / context
- Problem statement / purpose
- Objectives and scope of project
- Deliverables and time frames

5. EXPERIENCE / SKILLS / PAST PERFORMANCE

The attached spreadsheet must be used to summarise qualifications, skills and experience and to cost the proposal.

5.1. Qualifications and Experience required

- The company must have a minimum of 3 years' experience in rendering Employee Health and Wellness services for organisations (+/- 500) employees.
- Three (3) contactable references from the previous/current (Excluding DPME) organisations must be provided where wellness services are/were rendered for approximately 500 employees. See annexure 2 for format of references in addition a letter signed by the reference.
- The company must provide evidence that they have appropriately qualified Doctors, Social Workers, Nurses, Psychologists, Lawyers, motivational speakers, life coaches and Financial advisors, registered with relevant professional bodies (**Attach evidence; qualifications and proof of registration with professional bodies where applicable**).

Roles*	Qualifications	Experience
Medical Doctor/s	Minimum: Medical Doctors-MBChB or equivalent. Registered as a Medical Practitioner with HPCSA	Minimum: 5 years' experience in the related fields.
Social Worker/s	Minimum: A Degree in Social Work. Registered with the SACSSP.	Minimum: 7 years total work experience of which 3 years must be in the indicated sector.
Psychologist/s	Minimum (Master degree in Psychology) Registered with HPCSA (e.g. Clinical, counselling, education, industrial, research psychologist)	Minimum: 8 years relevant experience.
Lawyer/s	Minimum LLB or equivalent qualification. Admission as an Attorney /Advocate.	Minimum: 5 years post qualifications, litigation /Advisory experience.
Nurse/s	Minimum Basic R425 qualification that allows registered with SANC	Minimum: 5 years' experience as a professional nurse with SANC in general nursing.
Motivational speaker	Minimum: Life coaching certificate	Minimum: 5 years' work experience in the indicated sector Motivational speaker
Life coach/s	Life coaching certificate	Minimum: 5 years' work experience in the indicated sector Life coach
Financial advisor/s	Finance Diploma/Degree	Minimum: 5 years' work experience in the indicated sector (financial advice)

* One team member can have more than one of the roles indicated.

** Score will be combined for all experts – All experts must meet minimum criteria stipulated above to receive a score of 3.

Initials of specification committee members: _____

5.2 Proposal

5.2.1 The scope of the proposal must be aligned to the Employee Health and Wellness Strategic Framework for the Public Service in four areas namely HIV & AIDS and TB Management, Health and Productivity Management, SHERQ Management (Safety, Health, Environment, Risk, Quality) and Wellness Management. In terms of management of absenteeism, the service provider to align their consultancy services to the provisions of PILIR (policy on incapacity leave and ill-health retirement).

5.2.2 Bidder's proposal must demonstrate how they are going to render the service to the Department.

5.3. Confirmation of experience, qualification and availability

The following must be submitted for each of the proposed team members:

- Written confirmation of availability (signed by the proposed team member) for the expected duration of the project and an undertaking to render the services and perform the deliverables outlined in Annexure A.
- Detailed CV indicating qualifications, previous experience as well as letters of reference (references must be contactable).
- Copies of qualifications.

DPME reserves the right to verify all qualifications through the South African Qualifications Authority and to verify experience indicated on CVs with third parties.

5.4. Past performance

The past performance of bidders in executing similar projects will be evaluated using the references supplied by bidders as well as any other information available to the panel. Below satisfactory performance on a particular project may only be considered if such performance was communicated to the bidder by the contracting party and the bidder was given a reasonable opportunity to correct any deficiencies highlighted by the contracting party.

5.5. Project management

The bid proposal submitted by the bidder must include a detailed **project plan**. The start of the project will depend on the DPME procurement process.

6. COSTING METHODOLOGY

Prices must be inclusive of VAT (if VAT registered) and must include all costs to fully execute all deliverables indicated in this ToR. No variation in contract price will be permitted. Bidders are required to populate their costing using the attached **Annexure B3**.

7. EVALUATION OF BIDS

7.1. Administrative requirements

Annexures B1 to B3 **must** be completed using Microsoft Excel or compatible software. Annexures completed by hand (in writing) will not be accepted and such bids will be regarded as administratively non-compliant.

Only bids / quotes that comply with all administrative requirements and that submitted all required bid documents (acceptable bids) will be considered during the functional evaluation phase. Only acceptable bids / quotes will be scored by the Bid Evaluation Committee against the functional criteria indicated in this Terms of Reference.

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7.2. Scoring of bids (functional criteria)

The following weighting and scoring system will be applied to the evaluation of all functional criteria:

Weight allocation	Scoring system
1 – Value adding requirement (minimum score of 2)	1 – Does not comply with the requirements
3 – Important requirement (minimum score of 6 or 9)	2 – Partial compliance with requirements
5 – Essential requirement / integral part of project (minimum score of 15)	3 – Full compliance with requirements
	4 – Exceeds requirements

Score per criteria: The final score obtained by a bidder for each criteria will be calculated by multiplying the weight and the score indicated by each Bid Evaluation Panel member and then by averaging the scores of all panel members. The average score per criteria is expressed as a number.

The **overall score** obtained by a bidder (expressed as a percentage) will be calculated as follows:

$$\text{Overall Score (\%)} = \frac{\text{Sum of average scores for all criteria}}{\text{Sum of weights} \times 4} \times 100$$

7.3. Functional evaluation Part 1 – Quantitative criteria

Part 1: Minimum functional requirements: Only bids that scored at least the minimum score for each criteria will proceed to functional evaluation part 2. In cases where bidders submitted insufficient evidence or where evidence is ambiguous, bidders may be requested to provide additional evidence and may be re-scored based on this information. Additional information submitted may only be used as evidence to substantiate what is already contained in the proposal. The costing and content of proposals may not be amended.

Functional Evaluation Criteria				Weight	Min Score
1.1	Medical Doctor/s	Minimum: Medical Doctors- MBChB or equivalent. Registered as a Medical Practitioner with HPCSA	Minimum: 5 years' experience in the related fields.	3	9
1.2	Social Worker/s	Minimum: A Degree in Social Work. Registered with the SACSSP.	Minimum: 7 years total work experience of which 3 years must be in the indicated sector.	3	9
1.3	Psychologist/s	Minimum (Master degree in Psychology) Registered with HPCSA (e.g. Clinical, counselling, education, industrial, research psychologist)	Minimum: 8 years relevant experience.	3	9
1.4	Lawyer/s	Minimum LLB or equivalent qualification.	Minimum: 5 years post qualifications,	3	9

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		Admission as an Attorney /Advocate.	litigation /Advisory experience.		
1.5	Nurse/s	Minimum Basic R425 qualification that allows registered with SANC	Minimum: 5 years' experience as a professional nurse with SANC in general nursing.	3	9
1.6	Motivational speaker	Minimum: Life coaching certificate	Minimum: 5 years' work experience in the indicated sector Motivational speaker	3	9
1.7	Life coach/s	Life coaching certificate	Minimum: 5 years' work experience in the indicated sector Life coach	3	9
1.8	Financial advisor/s	Finance Diploma/Degree	Minimum: 5 years' work experience in the indicated sector (financial advice)	3	9

*** Combines score for all experts – All experts must meet minimum criteria stipulated above to receive a score of 3.*

7.4. Functional evaluation Part 2 – Qualitative criteria

The functional evaluation criteria indicated below will be applied during Part 2 of functional evaluation to all bids that met the minimum requirements stipulated under Functional evaluation Part 1. During part 2 the Bid Evaluation Committee may:

- Evaluate and score bids based on the bid documents and proposals submitted; or
- Provisionally evaluate and score bidders based on proposals submitted and then invite bidders that met all requirements under Part 1 and a provisional overall score of at least 60% for both functional evaluation parts 1 and 2, to present their bids.

The final evaluation and scoring of bids will be based on the proposals submitted, as well as on information provided by bidders during bid presentations (if applicable). Presentations can be used to summarise and clarify bids and may not substantially depart from the proposals submitted.

If a bidder is unable to attend a bid presentation on the date requested by the Bid Evaluation Committee, then the bidder must be afforded another opportunity within 5 working days. If a bidder is for a second time unable to attend a bid presentation, then the bid must be evaluated based on the bid documents and proposals submitted only.

Part 2: Minimum functional requirements: Only bids that obtained the minimum score for each criteria as well as an overall score of at least 75% for both functional evaluation parts 1 and 2, will proceed to Price/PPPFA evaluation.

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Functional Evaluation Criteria		Weight	Min. Score
2.1	<p>Company must provide proof that they have minimum of 3 years' experience in rendering EHW services for approximately 500 employees (attach contactable reference/s letters from 3 current or previous clients) (par 5.1.)</p> <p>1 = Company does not meet the minimum requirements 2 = Company partially meets the minimum requirements. 3 = Company meets all the minimum requirements 4 = Company exceeds the minimum requirements</p>	3	9
2.2	<p>1. The company is able to provide the minimum requirements as per Annexure A table 1 of deliverables and time frames</p> <p>1 = Company does not meet the minimum requirements 2 = Company partially meets the minimum requirements. 3 = Company meets all the minimum requirements 4 = Company exceeds all the minimum requirements</p>	3	9
2.3	<p>The company must provide evidence that they have a 24/7 toll free call centre facility (par 4 of Annexure A) Site visit will be conducted</p> <p>1 = Company does not meet the minimum requirements 2 = Company partially meets the minimum requirements. 3 = Company meets all the minimum requirements.</p>	3	9
2.4	<p>Understanding the brief. The proposal by the service provider: (par 3 of Annexure A)</p> <p>1 = Did not address the purpose and objectives of the project. 2 = Proposal shows minimal understanding of the service and partially addresses the purpose and objectives of the project. 3 = Proposal shows good understanding of the service and fully addresses the purpose and objectives of the project. 4 = Proposal shows exceptional understanding of the service, the purpose and objectives of the project responded innovatively and proposal offered added value to the project.</p>	3	9

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7.5. PPPFA: Price/Specific Goals

Only bids that meet the minimum administrative and functional requirements / specifications indicated in the ToR (qualifying bids) will be evaluated in terms of the Preferential Procurement Framework Act and related regulations – see attached bid documents. The evaluation method (80/20 or 90/10) and preference points allocation applicable to this bid are indicated in the attached SBD 6.1. Points to be allocated as follows:

The specific goals allocated in terms of the tender (MEANS OF VERIFICATION WILL BE: CSD BBBEE certificate/Affidavit/ID copy & Share certificate/ CIPC (CoR13)/ID Copy / Confirmation letters/CSD report-preferred address to be used for the award of points)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Points to applicable to 80/20 award >=More than <=Less than
Black ownership with at least 51 %	5	>51%=5 points <=51%=1 point
Black ownership with disabilities as defined by Employment Equity Act of 1998 (Attach certificate)	3	Yes = 3 points No = 0 point
Black women ownership with at least 30%	2	>30%=2 points <30%=0 point
Black youth ownership with at least 30% (at the date of closing of RFQ/RFP/Tender)	3	Yes = 3 points No = 0 point
Black military veteran ownership	2	Yes = 2 points No = 0 point
Suppliers situated in the local Municipality of the project/event (Local supplier from where the event is taking place -rural and semi urban areas	3	Yes = 3 points No = 0 point
Small, Medium & Micro Enterprises, makes a profit of less that 10 million a year	2	Yes = 2 points No = 0 point
TOTAL	20	

8. CONTRACT MANAGEMENT

The successful bidder will be required to enter into a service level agreement (SLA) with the Department of Planning, Monitoring and Evaluation. The National Treasury General Conditions of Contract (GCC) will form part of the SLA to be concluded between DPME and the successful bidder. A copy of the standard DPME SLA is available on the DPME tenders website. Bidders should familiarise themselves with the content of the standard template.

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9. SPECIAL CONDITIONS APPLICABLE TO THIS BID

The service provider must submit the following before the 10th of each month:

- 9.1. Monthly and quarterly reports on client usage and organizational health trends with recommendations on interventions to improve the health and wellbeing of DPME employees.
- 9.2. Detailed monthly invoices containing cost breakdown, VAT inclusive
- 9.3. All information related to this bid, or information provided to the service provider subsequent to the award of this bid, must be treated as confidential and may not be disclosed in any way to third parties without the explicit written consent of DPME.
- 9.4. All right, title and ownership of any Intellectual Property developed by or for the Service Provider or DPME independently and outside of execution/production of the Deliverables related to this bid, and provided during the course of this project ("Background IP") shall remain the sole property of the party providing the Background IP.
To the extent that the Service Provider utilises any of its Background IP in connection with the Deliverables, such Background IP shall remain the property of the Service Provider and DPME shall acquire no right or interest therein, save that, upon payment of the applicable consideration, the Service Provider shall grant DPME a non-exclusive, royalty-free, non-transferable licence to use such Background IP strictly for purposes of making beneficial use of the Deliverables into which such Background IP has been incorporated.
- 10. All Intellectual Property rights in Bespoke Deliverables are or will be vested in and owned by DPME unless specifically agreed otherwise in writing. The Service Provider agrees that it shall not, under any circumstances, question or dispute the rights and ownership of DPME in and to the Bespoke Deliverables. DPME shall grant the Service Provider a non-exclusive, royalty free, non-transferable licence to use the Bespoke Deliverables for the purpose of performing its obligations under this project.
- 11. The Service Provider may not publish or sell, in whole or in part, any Bespoke Deliverables emanating from this project without the explicit written consent of DPME.
- 12. The Copyright of any Bespoke Deliverables shall vest in DPME.
- 13. Bidders failing to attend the compulsory briefing session will be disqualified.

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