

REQUEST FOR QUOTATION (RFQ)
**PROVISION OF EMPLOYEE WELLNESS PROGRAMME SERVICES FOR A PERIOD OF THREE (3)
YEARS (AS AND WHEN REQUIRED)**

RFQ	RFQ/2021/22/93
RFQ ISSUE DATE	09 SEPTEMBER 2021
BRIEFING SESSION	N/A
RFQ DESCRIPTION	PROVISION OF EMPLOYEE WELLNESS PROGRAMME FOR A PERIOD OF THREE (3) YEARS (AS AND WHEN REQUIRED)
CLOSING DATE & TIME	16 SEPTEMBER 2021 @ 11:00
LOCATION FOR SUBMISSIONS	rfqs@inseta.org.za

Bidders must submit responses via e-mail at: rfqs@inseta.org.za or hand delivered to 37 Empire Road, Parktown, Johannesburg. For any queries or questions, please use above mentioned email address.

The INSETA requests your quotation on the services listed above. Please furnish us with all the information as requested and return your quotation on the date and time stipulated above. **Late and incomplete submissions will invalidate the quote submitted.**

SUPPLIER NAME: _____

POSTAL ADDRESS: _____

TELEPHONE NO: _____

FAX NO: _____

E MAIL ADDRESS: _____

CONTACT PERSON: _____

CELL NO: _____

SIGNATURE OF BIDDER: _____

1. BACKGROUND

- 1.1** The Insurance Sector Education and Training Authority (INSETA) is a public entity listed in schedule 3A of the PFMA and was established in March 2000. The INSETA must, in accordance with any prescribed requirements to perform in accordance with the Skills Development Act (SDA), the Skills Development Levies Act (SDLA), the Public Finance Management Act (PFMA), any other relevant legislation and the Constitution.
- 1.2** INSETA seeks to appoint a service provider to provide employee wellness programme services for a period of 3 years to +- 100 INSETA employees on an as and when required basis.

2. DEFINITIONS

- 2.1** DHET- Department of Higher Education and Training
- 2.2** AGSA – Auditor General South Africa
- 2.3** SDF – Skills Development Facilitator
- 2.4** SLA – Service Level Agreement
- 2.5** CRM – Customer Relationship Management
- 2.6** ETQA – Education Training and Quality Assurance
- 2.7** INSETA – Insurance Sector Education and Training Authority
- 2.8** EAPA-SA - Employee Assistance Professionals Association of SA
- 2.9** HPCSA - Health Professional Council
- 2.10** EME – Emerging Micro Enterprise
- 2.11** QSE – Qualifying Small Enterprise

3. BACKGROUND AND SITUATIONAL ANALYSIS

The purpose of these terms of reference is to request a service provider who specializes in Employee Wellness services to submit proposals to the INSETA.

- 3.1 INSETA appoints and develops talent, with diverse backgrounds, cares for the growth, development and well-being of staff.
- 3.2 INSETA understands that the emotional, physical and psychological well-being of its employees is important for the sustainable growth and development of the company as well as the continuous strive for success and excellence.
- 3.3 INSETA wants to foster a happy, positive and productive working environment that promotes care and concern for staff as well as personal success while respecting the diversified needs of employees to cope with work, family and personal lives.
- 3.4 Wellness is defined as a state of being healthy and this include mental, physical, legal, financial and medical well-being as well as work-life-balance.
- 3.5 To this end the general wellness of employees has prove to directly impact on productivity, efficiency, performance, staff absenteeism, the retention of staff; to name just a few.
- 3.6 INSETA acknowledges the importance of a wellness programme which helps reduce absenteeism caused by illnesses.
- 3.7 The Wellness Programme will provide INSETA employees **and their immediate family members** (as defined in the INSETA HR Policies) with support and guidance when they have to deal with life's challenges and opportunities.
- 3.8 Above all this is an opportunity to know how to solve a wide range of personal and job-related problems.

4. SCOPE OF DELIVERABLES

INSETA wants to appoint a service provider to provide a Wellness Programme that encompasses the following services, but not limited to;

- 4.1 Stress : Work-related, personal;
- 4.2 COVID related interventions
- 4.3 Financial : Money management, debt;
- 4.4 Legal: legal matters, maintenance, child custody, divorce law;
- 4.5 Relationships: spouses, family work, friends, partners;
- 4.6 Substance abuse : alcohol, drugs;
- 4.7 Family matters : child care, care for the elderly, education, benefits;
- 4.8 Health issues : e.g. BMI tests, illness, HIV and AIDS, Pandemics & Disaster Management Assistance etc;
- 4.9 Work : stress management, career matters, maternity, harassment, dealing with your boss, managing others;
- 4.10 Bereavement : grief, loss
- 4.11 Telephonic and/or face to face consultation

Working together for a skilled tomorrow

- 4.12** Employee wellness special events & publications or interventions: world calendar specific programmes (Aids day / cancer day / womens day) in-line with celebrated themes health screening e.g HIV Aids test, eye test, eating plan, prostate cancer test, breast cancer test, ear test, pap smear test etc.
- 4.13** Employee wellness awareness events must be implemented through various channels i.e posters, newsletters, webinars, digital platforms, face to face events in conjunction with marketing and HR departments.
- 4.14** The service provider proposal needs to make provision for +- a **100** staff members including the added support benefit to staff members immediate families (*at no additional costs*). Bidders to note employee family members are defined as spouse or life partner and employees parents, adoptive parents, grand parents, child and adopted child.
- 4.15** The bidder proposal must also included services related to Ad-hoc critical management; crisis management briefing, traumatic stress debriefing; and grief counselling
- 4.16** Bidder must provide services that seek to attend to annual events (interactive sessions that will attend to social matters in the work place for management, specialist and general staff of INSETA, matters such as:
- 4.16.1 Workplace Bullying
 - 4.16.2 Diversity Management
 - 4.16.3 Sexual Harassment
 - 4.16.4 Team Coaching

5. CONFIDENTIALITY

INSETA understands the nature and requirements of a Wellness Programme.

- 5.1** Therefore, seeks to appoint a provider who respects and abides by the principle of confidentiality as it relates to wellness matters between the provider and INSETA employees in accordance with POPI Act 4 of 2013. This matter will be included in the contract.

6. DEVELOPMENT OF EMPLOYEE WELLNESS REQUIREMENTS

- 6.1** As part of the requirements, the appointed service provider will be expected to provide regular updates on relevant regulations aligned to Employee Wellness Programmes.

7. DOCUMENT MANAGEMENT, REPORTING AND AUDIT TRAIL

7.1 Document Management:

The Service Provider will be required to:

- 7.1.1 Maintain an adequate backup of all project related documentation.
- 7.1.2 Make provision for all electronical stored data, hard copy originals and microfilm/fice and other media deemed property of the INSETA and must be returned to INSETA in a retrievable form at the termination of the contract.

Working together for a skilled tomorrow

7.1.3 The INSETA and the service provider will develop policies and procedures for the archiving of data including format and media as well as standards on destroying material and data. While in the possession of the service provider, all such material must be stored off-site in a secure room, vault or container.

7.2 REPORTING

Notwithstanding the expectation of confidentiality, the service provider must provide monthly and quarterly reports on the following:

- 7.2.1 The nature of consultation
- 7.2.2 The number of consultations
- 7.2.3 Related costs of consultations
- 7.2.4 Any other relevant and significant information as so deemed by the INSETA.

7.3 AUDIT TRAIL

- 7.3.1 The Service Provider will be required to maintain adequate audit trails of any and all written
- 7.3.2 Communication, minutes of meetings and financial records pertaining to the engagement with the INSETA.

8. COMMUNICATION/ DELIVERY CHANNELS

The service provider will be expected to offer the following communication channels as approved by HR, but not limited to: *(the successful bidder will provide the bidder with the INSETA Corporate Identity Manual)*

- 8.1 24/7 365 Call centre facility, the service must be available in all official languages
- 8.2 Face to face services *(eight to ten (8 to10) counselling sessions per issue per year)* by qualified professionals *(psychologists, social workers etc)* on the national or local network.
- 8.3 The type of professional or support required will be determined by the nature of the problem at hand.
- 8.4 Electronic services such as online counselling via email, IM (instant messaging/chat), Zoom, Microsoft Teams and any other digital platforms facility and online discussion forum.
- 8.5 Other means of communication and consultation strategies, including but not limited to the bidder engaging and reporting to the INSETA Management Team, Steering Committees and Executives, as and when required.

9. ELIGIBILITY

- 9.1 This assistance/ programme will be rendered to all INSETA staff members and their immediate families. All eligible employees, managers, and their dependants can access support (*child or adopted child ,spouse or life partner; parent, adopted parent, grandchild, grandparent, or brother or sister*)

10. ACCOUNT MANAGEMENT

- 10.1 The service provider will be reporting to the Human Resource Manager at INSETA regard account management.
- 10.2 A sound relationship between the service provider and INSETA is seen as key to the success of this programme.
- 10.3 Effective and efficient communication sessions which includes amongst other launch,orientation and promoting of the programme, service information collateral (*e.g. promotional items, cards, posters etc*)

11. TIMEFRAMES

- 11.1. The duration of the contract will be for period of 3 years (*as and when required*).

12. CONTRACTUAL OBLIGATION

- 12.1. The contract will be capped at **R 1 000 000,00 including VAT** for services as and when required.
- 12.2. The bidder will be required to sign a Service Level Agreement (SLA) with the bidders' approved submission as annexure to the contract.
- 12.3. For each service required, the bidder will be required to accept a purchase order.
- 12.4. Upon purchase order for services required, the bidder will be required to submit proof of tax compliance as well as BBBEE certificate accredited by SANAS, or DTI sworn Affidavit.
- 12.5. The service provider's quotation must also provide sufficient detail in terms of various cost items such as total "man" hours and daily rates for the project team.
- 12.6. In the case of the service provider using sub-contractors, the former will be responsible for ensuring delivery of services from any such sub-contractors and for making any payments to such sub-contractors.
- 12.7. Bidder must adhere to Protection of Personal Information (POPI) Act throughout the duration of the contract.

Working together for a skilled tomorrow

13. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 13.1.** No legal or other obligation shall arise between the service provider and INSETA unless/until both parties have signed a formal contract or Service Level Agreement in place.
- 13.2.** The Contract site is at **INSETA (as and when required)**.

14. WORKMEN AND SUPERVISION ON SITE

- 14.1.** The service provider shall be held responsible for the conduct of his employees and the conduct of his sub-contractor's employees for the full duration of the contract.

15. PREQUALIFICATION CRITERIA (Phase 1)

- 15.1.** Proof of registration on CSD (**Central Supplier Database**)
- 15.2.** Bidder must provide proof (**BBBEE Certificate accredited by SANAS or DTI Sworn Affidavit**) and must be an EME, QSE and Generic (**only level 1 and 2 BBBEE contributor**) status will be considered.

Note: All bidders who do not comply with the items listed above will be disqualified.

16. EVALUATION CRITERIA (Phase 2)

- 16.1** Responses will be evaluated using a predetermined set of evaluation criteria. The evaluation criteria is designed to reflect the INSETA's requirements in terms of identifying a suitable service provider and ensure the selection process is transparent and affords all the bidders a fair opportunity for evaluation and selection.
- 16.2** Evaluation will be conducted in 2 phases, technical and functional criteria.

16.3 Technical Evaluation (Phase 2a)

16.3.1. Bidders must comply fully with the below mentioned table **70 points**

16.3.2. **Should the bidder/s not meet all the required points, they will be disqualified from further evaluation.**

Item	Criterion	Maximum
Technical Proposal	<p>Bidders must submit a detailed methodology outlining on how the bidder intends addressing the listed items list in:</p> <ul style="list-style-type: none"> • Section 4 (scope of work and deliverables) in the bid document. = 10 points • Section 5 (Confidentiality) = 10 points • Section 6 (Development Of Employee Wellness Requirements) = 10 points • Section 7 (Document Management, Reporting And Audit Trail) = 10 points • Section 8 (Communication/ Delivery Channels) = 10 points • Section 9 (Eligibility) = 10 points • Section 10 (Account Management) = 10 points <p>Non-compliance with any and all of the above = 0 points</p>	70
TOTAL		70

16.4. Functional Evaluation (Phase 2b)

- 16.4.1. Bidders must comply with the minimum of **70 points out of a 100 maximum points**.
 16.4.2. should the bidder/s not meet the minimum **required points**, they will be disqualified and will **not qualify for further evaluation in terms of Price & BEE Preference points system (Phase 3)**

Description	Criterion	Maximum points
Company profile & Reference letters	<p>Bidder to submit a company profile reflecting a list of clients where EAP services are currently or previously provided reflecting the below mentioned elements = 40 points</p> <ul style="list-style-type: none"> • Description of the Company • Company Services • Company Contact details (contactable email address) • EAP Experience (Duration of contract) • Number of client staff (minimum 100) <p>Letters:</p> <ul style="list-style-type: none"> • 1- 3 references = 30 points • 4 – 6 references = 40 points • above 6 references = 60 points <p>Non-compliance with the minimum points = 0 points</p>	60
Experience of Key Personnel	<ul style="list-style-type: none"> • Key personnel must submit proof of registration with the Employee Assistance Professionals Association of SA (EAPA-SA) in the form of a valid membership certificate, And, = 20 points • Key personnel must submit proof of registration of key staff with the Health Professional Council of SA (HPCSA) in the form of a Valid certificate. = 20 points <p>Non-compliance with all of the above = 0 points</p>	40
Total		100

Note: All bidders achieving less than the set threshold will be declared non-responsive.

17. PRICING SCHEDULE

No.	DETAILED DESCRIPTION	Year 1	Year 2	Year 3
1.	EAP Services	R	R	R
2.	Accounts Manager	R	R	R
3.	Employee Orientation (virtual)	R	R	R
4.	Training Sessions (workplace bullying, sexual harassment, diversity management and team coaching)	R	R	R
5.	Monthly Management fee	R	R	R
VAT at 15%				R
Total				R

18. ADJUDICATION USING A POINT SYSTEM

- 18.4.** The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 18.5.** Preference points shall be calculated after process has been brought to a comparative basistaking into account all factors of non-firm prices.
- 18.6.** In the event that two or more bids have scored equal points in terms of price and preference points for BBBEE, the successful bid must be the one scoring the highest number of preference points for BBBEE - in terms of PPPFA Regulation 2017 – Section 11 (1) & (2)
- 18.7.** However, when functionality is part of the evaluation process and two or more bids have scored equal points for BBBEE, the successful bid must be the one scoring the highest score for functionality.
- 18.8.** Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

19. POINTS AWARDED FOR PRICE AND BBBEE PREFERENCE POINT

The **80/20** preference point system

A maximum of **80** points is allocated for price on the following basis:

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

P_{\min}

Where:

P_s = Points scored for comparative price of bid under Consideration

P_t = Comparative price of bid under consideration

P_{\min} = Comparative price of lowest acceptable bid

Board Members: Mr. J.S. Ngubane (Chairperson), Ms. V. Pearson (Business), Ms. L. van der Merwe (Business), Ms. R.G. Govender (Business), Ms. P. Mendes (Business), Ms. Z. Motsa (Business), Mr. M. Soobramoney (Labour), Mr. J.J.M. Mabena (Labour), Ms. S.A. Anders (Labour), Mr. C.B. Botha (Labour), Ms. S.T. Dinyake (Labour),

Ms. F. Mabaso (Government), Mr. S.M. Mpuru (Community Organisation)

CEO: G. Mkhize

20. B-BBEE PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:

B-BBEE Status Level of contributor	Number of points 80/20 system
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

20.4. Bidders who qualify as EME's and QSE's in terms of the B-BBEE Act must submit a Sworn affidavit. Misrepresentation of information constitutes a criminal offence.

20.5. Bidders other than EME's or QSE's must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by SANAS.

20.6. Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

20.6.1. Consortium

- a) A consortium is an association of two or more individuals, companies, organisations or governments (or any combination of these entities) with the objective of participating in a common activity or pooling their resources for achieving a common goal.
- b) A consortium requires that each participant retains its separate legal status and the consortium's control over each participant is generally limited to activities involving the joint endeavour, particularly the division

of profits. A consortium is formed by contract, which delineates the rights and obligations of each member.

- c) In a consortium, only the lead bidder's credentials both in terms of financial and technical qualifications are considered. Therefore, the interpretation and application to a RFQ/Bid process is such that the lead partner is identified and the following requirements are required as follows:
- a) **Lead Partner**
- All administrative documents (consortium agreement between the lead partner and the partner)
 - Technical requirements (which will show in the proposal and other requirements why the need for the consortium, which for all intent and purpose fulfils the requirements of the bid through combination of skills)
- b) **Partner**
- Proof of CSD registration.
 - Tax Pin.
 - BBBEE Sworn-Affidavit.
 - SBD 4 Declaration of interest.
 - SBD 8 Past supply chain.
- d) It should be taken into cognisance that although the lead partner is the qualifying entity, the partner should prove that it can do business with state-owned entities, through CSD registration, proof that the taxes are compliant, its level of BBBEE status in order to align with the BBBEE status level required by the BID, declare interest and answer questions that it is not a disqualified entity with the National Treasury. The foregoing ensures compliance from an SCM process perspective that the consortium is in order.
- e) Of importance is that in a consortium, each individual team members retain their identities.

20.7. A joint venture

20.7.1. A joint venture is a business entity created by two or more parties, generally characterized by shared ownership, returns and risks and shared governance.

20.8. Unincorporated joint venture:

20.8.1. All SCM documents are filled in by the joint venture in the name of the joint venture, although the submission of administrative documents (partnership agreement between parties) will be completed in the name of the joint venture, and the following will be required from both parties, amongst others

- a) SBD 4.
- b) SBD 6.
- c) SBD 8.
- d) SBD 9.
- e) Tax pin
- f) CSD registration.
- g) The JV agreement will direct which bank account of the two entities will be used.
- h) Consolidated Joint BBBEE Certificate.

20.9. Incorporated joint venture

20.9.1. This aligned to a registered entity or company. A registered entity/ company with a consolidated BBBEE certificate and a bank account in the name of the Joint venture. The required compliance documents must be complete by the entity/ company the name of the joint venture, and the following will be required amongst others

- a) SBD 4.
- b) SBD 6.
- c) SBD 8.
- d) SBD 9.
- e) Tax pin
- f) CSD registration.
- g) The JV agreement will direct which bank account of the two entities will be used.
- h) Consolidated Joint BBBEE Certificate.

20.9.2. A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended Sub-contractor is an EME that has the capacity and the ability to execute the sub-contract.

20.9.3. A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capacity and the ability to execute the sub-contract.

21. COMMUNICATION

Respondents are warned that a response will be disqualified should any attempt be made by a bidder either directly or indirectly to canvass any officer(s) or employees of INSETA in respect of BID process, between the closing date and the date of the award of the business.

All enquiries relating to this BID should be emailed **three days before the closing date**.

22. CONDITIONS TO BE OBSERVED WHEN BIDDING

The organization does not bind itself to accept the lowest or any BID, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and delivery of his BID submission. The organization also reserves the right to withdraw or cancel the BID at any stage.

No BID shall be deemed to have been accepted unless and until a formal contract / letter of award is prepared and executed.

The competitive shall remain open for acceptance by the Organization for a period of **90 days** from the closing date of the BID Enquiry.

INSETA reserves the right to:

- 22.4. Not evaluate and award a bid that do not comply strictly with this BID document.
- 22.5. Make a selection solely on the information received in the Bid Document and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the terms of reference.
- 22.6. Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders. During the evaluation process, no change in the content of the BID shall be sought, offered or permitted.
- 22.7. Cancel this BID at any time as prescribed in the PPPFA regulation.
- 22.8. Should bidder(s) be selected for further negotiations, they will be chosen on the basis

of the cost effectiveness and the principal of value for money not necessarily on the basis of the lowest costs.

23. Cost of Bidding

23.4. The bidder shall bear all costs and expenses associated with preparation and submission of its BID submission and the INSETA shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection process.

24. Note to Bidders:

24.4. Due diligence to be conducted by INSETA prior to the award of the contract.

END OF TERMS OF RFQ DOCUMENT

Annexed to this document for completion and return with the document:

- Preference Points Claim Form (SBD 6.1), Declaration of Interest (SBD 4),
- Declaration of Bidder's Past Supply Chain Practices (SBD 8),
- Certificate of Independent Bid Determination (SBD 9)
- General Conditions of Contract (GCC)
- Bidders bank confirmation letter reflecting company registration number

Non – compliance in returning above mentioned documents, will deem the bid nonresponsive.