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### **REQUEST FOR QUOTATION (RFQ)**

#### **PROVISION OF EMPLOYEE WELLNESS PROGRAMME FOR A PERIOD OF THREE (3) YEARS**

<b>RFQ</b>	<b>RFQ/2021/22/01</b>
<b>RFQ ISSUE DATE</b>	<b>29 April 2021</b>
<b>BRIEFING SESSION</b>	<b>N/A</b>
<b>RFQ DESCRIPTION</b>	PROVISION OF EMPLOYEE WELLNESS PROGRAMME FOR A PERIOD OF THREE (3) YEARS
<b>CLOSING DATE &amp; TIME</b>	<b>06 May 2021 @ 11:00</b>
<b>LOCATION FOR SUBMISSIONS</b>	<a href="mailto:rfqs@inseta.org.za">rfqs@inseta.org.za</a>

**Bidders must submit responses via e-mail at: [rfq@inseta.org.za](mailto:rfq@inseta.org.za), before on the stipulated date and time. 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: \_\_\_\_\_

**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. S.J. Kruger (Business), Ms. Z. Motsa (Business), Mr. R.P. Motlhabane (Labour), 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**

## **DETAILED SPECIFICATION**

### **PROVISION OF EMPLOYEE WELLNESS PROGRAMME FOR A PERIOD OF THREE (3) YEARS**

#### **1. INSETA OVERVIEW**

- 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.

#### **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 service provider who specialize in Employee Wellbeing 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 employees
- 3.3 is important for the sustainable growth and development of the company as well as the continuous strive for success and excellence.
- 3.4 INSETA wants to foster a happy, positive and productive working environment that
- 3.5 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.
- 3.6 Wellness is defined as a state of being healthy and this includes mental, physical, legal, financial and medical well-being as well as work-life-balance.
- 3.7 To this end the general wellness of employees has proved to directly impact on productivity, efficiency, performance, staff absenteeism, the retention of staff; to name just a few.
- 3.8 INSETA acknowledges the importance of a wellness programme which helps reduce absenteeism caused by illnesses.
- 3.9 The Wellness Programme will provide INSETA employees **and their immediate family members** with support and guidance when they have to deal with life's challenges and
- 3.10 opportunities.
- 3.11 Above all this is an opportunity to know how to solve a wide range of personal and job-related problems.

### 4. SCOPE OF DELIVERABLES

- 4.1 INSETA wants to appoint a service provider to provide a Wellness Programme that
- 4.2 encompasses the following services but not limited to
- 4.3 Stress : Work-related, personal;
- 4.4 COVID related interventions
- 4.5 Financial : Money management, debt;
- 4.6 Legal: legal matters, maintenance, child custody, divorce law;
- 4.7 Relationships: spouses, family work, friends, partners;
- 4.8 Substance abuse : alcohol, drugs;
- 4.9 Family matters : child care, care for the elderly, education, benefits;
- 4.10 Health issues : e.g. BMI tests, illness, HIV and AIDS, Pandemics & Disaster Management Assistance etc;
- 4.11 Work : stress management, career matters, maternity, harassment, dealing with your boss, managing others;
- 4.12 Bereavement : grief, loss
- 4.13 Telephonic and/or face to face consultation

- 4.14 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.
- 4.15 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.
- 4.16 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, doptive parents, grand parents, child and adopted child.
- 4.17 The bidder proposal must also included services related to Ad-hoc critical management; crisis management briefing, traumatic stress debriefing; and grief counselling

## 5. CONFIDENTIALITY

- 5.1 INSETA understands the nature and requirements of a Wellness Programme. It therefore seek s to appoint a
- 5.2 provider who respects and abides by the principle of confidentiality as it relates to well ness matters
- 5.3 between the provider and INSETA employees in accordance with POPI Act 4 of 2013 (came to effect 1 July 2020). This matter will be included in the contact

## 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. The
- 7.1.3 INSETA and the Service Provider will develop policies and procedures for the archiving of data including
- 7.1.4 format and media as well as standards on destroying material and data. While in the p ossession of the
- 7.1.5 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 to 10) 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. CONTRACTUAL OBLIGATION

- 11.1 Monthly costs for +/- 100 employees
- 11.2 The service provider's quotation must also provide sufficient detail in terms of various cost items such as total "man" hours and rates. **(the total cost must be clearly stipulated)**
- 11.3 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. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 12.1 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.
- 12.2 The Contract site is at **INSETA (as and when required)**.

## 13. WORKMEN AND SUPERVISION ON SITE

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

## 14. PREQUALIFICATION CRITERIA (Phase 1)

- 14.1 Proof of registration on CSD (Central Supplier Database)
- 14.2 Valid BBEEE Certificate or Sworn Affidavit as a BBEEE Level 1 or Level 2 contributor (EME or QSE on closing date of the bid) – **no Generic companies will be accepted.**

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

## 15. MANDATORY REQUIREMENTS (Phase 2)

- 15.1 Bidder must submit proof of registration with the Employee Assistance Professionals Association of SA (EAPA-SA) in the form of a valid membership certificate.

**15.2** Bidder must submit proof of registration of key staff with the Health Professional Council of SA (HPCSA) in the form of a valid certificate.

Item	Criterion	Maximum
<b>Technical Proposal</b>	<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"> <li>• <b>Section 4</b> (scope of work and deliverables) in the bid document. = <b>10 points</b></li> <li>• <b>Section 5</b> (Confidentiality) = <b>10 points</b></li> <li>• <b>Section 6</b> (Development Of Employee Wellness Requirements) = <b>10 points</b></li> <li>• <b>Section 7</b> (Document Management, Reporting And Audit Trail) = <b>10 points</b></li> <li>• <b>Section 8</b> (Communication/ Delivery Channels) = <b>10 points</b></li> <li>• <b>Section 9</b> (Eligibility) = <b>10 points</b></li> <li>• <b>Section 10</b> (Account Management) = <b>10 points</b></li> </ul> <p><b>Non-compliance with any and all of the above = 0</b></p>	<b>70</b>
<b>TOTAL</b>		<b>70</b>

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

## **16. EVALUATION CRITERIA (Phase 3)**

**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 Technical Evaluation (Phase 3a)**

- 16.2.1 Bidders must comply fully with the below mentioned table **70 points (0 means non-compliance – full marks mean 100% compliance)**
- 16.2.2 should the bidder/s not meet all the **required points**, they will be disqualified and will **not qualify for further evaluation (Phase 3b)**



***Note: All bidders who do not score the total score of 70 against the items listed above will be disqualified.***

- 16.2.3 Bidders must comply with the minimum of **70 points out of a 100 maximum points.**
- 16.2.4 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 4)**





**Phase 3b**

Item	Criterion	Maximum points
Company profile & Reference letters	<p><b>Bidder to submit a company profile reflecting a list of clients where EAP services are currently or previously provided highly the below mentioned elements = 40 points</b></p> <ul style="list-style-type: none"> <li>• Description of the Company</li> <li>• Company Services</li> <li>• Company Contact details</li> <li>• EAP Experience</li> </ul> <p><b>And;</b></p> <p><b>Bidder must submit letters from clients in the clients' letterhead where the company previously provided services or is currently providing services where EAP services were provided. The following should be reflected on the reference letters not older than 5 years:</b></p> <ul style="list-style-type: none"> <li>• Name of Client</li> <li>• Contactable trade reference should be senior personnel/executive authority.</li> <li>• Services</li> <li>• Start date (Month/Year)</li> <li>• Completion date (Month/Year)</li> <li>• Description of actual services provided</li> <li>• Value of the contract</li> <li>• Number of client staff (<i>minimum 100</i>)</li> </ul> <p><b>Letters:</b></p> <ul style="list-style-type: none"> <li>• 1- 3 reference letters = <b>30 points</b></li> <li>• 4 – 6 letters = <b>40 points</b></li> <li>• above 6 letters = <b>60 points</b></li> </ul> <p><b>Non-compliance with the minimum points = 0 points</b></p>	100
<b>Total</b>		<b>100</b>

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

6.2.1 Bidders are required to pass the minimum threshold of **10 points** on the functional criteria to be considered for the final phase which is price and BBEE.

6.2.2 Bidders who score less than **10 points** will **not** be considered for the final phase, and thus be disqualified.

## 17 ADJUDICATION USING A POINT SYSTEM

**17.1** The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder

**17.2** Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.

**17.3** In the event that two or more bids have scored equal points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.

**17.4** However, when functionality is part of the evaluation process and two or more bids have scored equal points for B-BBEE, the successful bid must be the one scoring the highest score for functionality

**17.5** Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

## 18 POINTS AWARDED FOR PRICE

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

## 19 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

- 19.1 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.
- 19.2 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.
- 19.3 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 19.4 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 19.5 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.
- 19.6 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.
- 19.7 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.

## 20. 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 a RFQ, between the closing date and the date of the award of the business.

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

## 21. CONDITIONS TO BE OBSERVED WHEN RFQING

INSETA does not bind itself to accept the lowest or any RFQ, 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 RFQ. INSETA reserves the right to accept a separate RFQ or separate RFQs for any one or more of the sections of a specification. The corporation also reserves the right to withdraw the RFQ at any stage.

No RFQ shall be deemed to have been accepted unless and until a formal contract / letter of intent is prepared and executed. Quotation shall remain open for acceptance by the Corporation for a period of **90 days** from the closing date of the RFQ Enquiry.

**INSETA reserves the right to:**

- 21.1** Not evaluate and award RFQs that do not comply strictly with this RFQ document.
- 21.2** Make a selection solely on the information received in the RFQs and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the evaluation of this RFQ.
- 21.3** 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 RFQ shall be sought, offered or permitted.
- 21.4** Award a contract to one or more bidder(s).
- 21.5** Accept any RFQ in part or full at its own discretion.
- 21.6** Cancel this RFQ or any part thereof at any time as prescribed in the PPPFA regulation.
- 21.7** Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the greatest benefit to the Corporation and not necessarily on the basis of the lowest costs.

## 22. Cost of Bidding

The bidder shall bear all costs and expenses associated with preparation and submission of its RFQ or RFQ, 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.

**END OF RFQ DOCUMENT**

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**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 submission as nonresponsive.**

