

**RFQ REQUEST FOR QUOTATION**

<b>RFQ</b>	<b>RFQ/INS/2024/2025/0071</b>
<b>RFQ ISSUE DATE</b>	<b>18 OCTOBER 2024</b>
<b>RFQ DESCRIPTION</b>	<b>APPOINTMENT OF A SUITABLY QUALIFIED AND EXPERIENCED SERVICE PROVIDER TO PROVIDE AN EMPLOYEE WELLNESS PROGRAMME FOR A PERIOD OF THREE (3) YEARS.</b>
<b>CLOSING DATE &amp; TIME</b>	<b>23 OCTOBER 2024 – AT 11:00 – Late submission will not be considered</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: [rfqs@inseta.org.za](mailto:rfqs@inseta.org.za)**

**For any queries or questions, please use the 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: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

CELL NUMBER: \_\_\_\_\_

BIDDER SIGNATURE: \_\_\_\_\_

## 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, perform in line 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. OBJECTIVES

- 2.1. INSETA seeks to appoint a service provider for the provision of an Employee Wellness Programme for a **period of three (3) years to +- 130 INSETA employees.**
- 2.2. The objective of this RFQ is to request for quotation to appoint a competent Service Provider for the appointment of a suitably qualified and experienced service provider to provide an employee assistance program for a period of three (3) years.
- 2.3. INSETA aims 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.
- 2.4. 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.
- 2.5. The service provider must provide support and advice according to their areas of expertise to enhance the following:
- 2.5.1. To increase productivity, morale, and teamwork and strengthen the relationships between management, employees, and the organization by providing a sustainable and confidential employee wellness service to all INSETA employees.
  - 2.5.2. To provide management with a practical resource to aid in the supporting of employees with personal and work-related problems to enhance an employee's performance.
  - 2.5.3. To establish and maintain a support system through which employees can be identified, motivated, and referred for assistance.
  - 2.5.4. To promote work-life balance and maintain a healthy workforce



### 3. SCOPE OF WORK

- 3.1** The service provider's proposal must make provision for +- 130 staff members including the added support benefit to staff members' immediate families (at no additional costs). The service provider notes employee family members are defined as spouse or life partners, biological parents, adoptive parents, grandparents, children, and adopted children.
- 3.2** The scope of services is a comprehensive Employee Wellness Programme consisting of the following core elements but not limited to:
- 3.2.1 Employee Wellness Services:** includes counseling services, trauma counseling debriefing to employees and immediate family which includes prevention interventions, treatment care, support, and referral to appropriate external resources for additional support.
- 3.2.2 Health and productivity management** includes chronic disease management, incapacity due to ill health and non-performance, health promotion, awareness and education; and increasing employee productivity levels.
- 3.2.3 Wellness Management:** includes but is not limited to work-life balance interventions such as stress management, financial fitness, relationship building, and coaching amongst others.
- 3.2.4 Wellness Program:** entails personalised experience that supports employees across areas of mental, physical, and wellness assessments and consultations both personal and professional.
- 3.3** The provision of a registered Medical Practitioner to be placed in INSETA Offices once a month or as and when required.
- 3.4** Temporary incapacity assessments (as and when required)

## 4. DELIVERABLES

The service provider shall provide the INSETA with an Employee Wellness Programme for a period of three (3) years and the following deliverables are expected:

- 4.1 Provide 24-hour access (telephonic/email/ social media forums, etc) with suitably qualified professionals available to INSETA employees 24/7/365. The turnaround time for normal case response should be no more than 48 hours from the request for assistance and critical incidents should be no more than 24 hours from the request for assistance. Psycho-social Counselling face-to-face sessions (off-site)/virtually).
- 4.2 Psychological and clinical counseling and awareness talks aligned to themes by professionals within the related area of discussion (e.g., breast cancer, women's month, mental wellness month, men's health month, etc) when needed (make allowance for a minimum of 4 talks per year).
- 4.3 Employee wellness special events and publications or interventions: world calendar specific programs (Aids Day / Cancer Day / Women's Day) in-line with celebrated themes of health screening e.g Voluntary Counseling and Testing (VCT) HIV/Aids test, Eye Test, Eating Plan, Prostate Cancer Test, Breast Cancer Test, Ear Test, Pap Smear Test, Hypertension (BP Monitoring).
- 4.4 Employee wellness awareness events must be implemented through various channels i.e. posters, newsletters, webinars, digital platforms, and face-to-face events in conjunction with marketing and HR departments.
- 4.5 Provide program support for Managers/Executives on:
  - Coaching Managers on how to deal with employee challenges e.g. (Non-performance, relationship management, conflict management), etc.
  - Training of Managers on EWP case referral and management:
  - Management support services through management systems on Absenteeism and leave management.
  - Management referral service
  - People performance management.
- 4.6 Conduct temporary incapacity assessments ( as and when required)
- 4.7 Provide support for workplace violence/sexual harassment and other work-related conflicts, trauma debriefing, counseling, and bereavement support.



- 4.8** Provide services related to Ad-hoc critical management; crisis management briefing, traumatic stress debriefing; and grief counseling
- 4.9** Provide support on the Health and Productivity Management Program:
- Life-threatening disease awareness and management including other related chronic diseases.
  - Substances abuse awareness and education (alcohol, drugs, and prescription medication) and other addictive behaviors such as gambling, pornography, etc.
- 4.10** Provide support and content for ad-hoc Work-Life Balance Programmes and Preventatives and:

Life skills program that includes:

- Financial well-being consultations
- Stress management.
- Health and fitness education.
- Lifestyle management.
- Trauma counselling.
- Critical Incident Stress Management

Availability and accessibility:

- Lifestyle, medical, and preventative health counseling
- Annual health/wellness plan
- Online monthly wellness articles
- Monthly awareness posters including a Health calendar
- Quarterly Employee awareness sessions
- Management and employee orientation sessions
- Group crisis intervention

**4.11** Reporting

- Monthly reporting including statistical analysis, interpretation, and recommendations.
- Quarterly statistics reports including statistical analysis, interpretation, and recommendations.
- Bi -annually report on all health statuses of the organisation and recommendations

- Monthly, quarterly, and annual reports on employee utilisation rate, and areas of concern/improvement.

**4.12** Quality of project delivery

- The appointed service provider shall deliver of quality work, within agreed timelines for all deliverables.
- The appointed service provider will take the responsibility to ensure that all work conforms to the highest professional standards.

**5. CONTRACT DURATION**

- 5.1.** The contract will be for a period of three (3) years.

**6. EVALUATIONS: ADMINISTRATION CRITERIA (Phase 1)**

- 6.1.** Bidder must submit proof of registration on CSD (Central Supplier Database).
- 6.2.** Bidder must submit fully completed and signed bid documents:
- 6.2.1. Standard Bidding Document (SBD 4) Bidder's Disclosure.
- 6.2.2. SBD 6.1 Preference Points Claim form.
- 6.2.3. Signed Request for Quotation (RFQ) form.
- 6.3.** General Conditions of Contract (GCC) initiated on each page.

**7. MANDATORY CRITERIA (Phase 2)**

- 7.1.** Valid proof of registration with the **Employee Assistance Professionals Association of South Africa (EAPA – SA)**.
- 7.2.** Key personnel must submit a valid proof of registration with the **Health Professional Council of South Africa (HPCSA)**
- 7.3.** The bidder must submit a minimum of **three (3) contactable reference letters** indicating proof of providing Employee Wellness Programme services in the **past five (5) years**. The reference letters must be signed on the client's letterhead, contactable number, email, or cell, and dated.

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

## PRICE CONSIDERATION (Phase 3)

### PRICING SCHEDULE

- 7.1. The service provider must ensure that the price quotations are inclusive of all applicable taxes (Including VAT). Costing must comprise all the relevant services proposed in the bidder submission.
- 7.2. Quotations on company letterhead aligned with the items listed below.

No.	Description	Cost Year 1	Cost Year 2 – escalation price of 5%	Cost Year 2 – escalation price of 5%
1.	Clinical and Professional Support Life Services for employees and households (24/7/365 via standard toll-free line)			
2.	Life Management Services			
3.	Telephonic Health & Medical Support Services			
4.	Musculoskeletal Health Management			
5.	Comprehensive Absence Management			
6.	Face to Face or Virtual Video Counselling			
7.	Onsite Group Trauma and Crisis Intervention			

No.	Description	Cost Year 1	Cost Year 2 – escalation price of 5%	Cost Year 2 – escalation price of 5%
8.	Online Health & well-being Programme			
9.	Training (Workplace bullying, sexual harassment, diversity management, team coaching)			
10.	Account Manager			
11.	Management Fee			
<b>Total</b>				
<b>VAT</b>				
<b>Grand Total</b>				





## **8. ABSENCE OF OBLIGATION & CONFIDENTIALITY**

- 8.1. 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.
- 8.2. The Contract site is at INSETA (as and when required).

## **9. WORKMEN AND SUPERVISION ON-SITE**

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

## **10. CONTRACTUAL OBLIGATION**

The bidder will be required to comply with the following:

- 10.1. Signatory to SBD 7.2 contract form with the bidder's approved submission as annexure to the contract.
- 10.2. For each service required the bidder will be required to accept a purchase order.
- 10.3. Compliance with the general conditions of contract.
- 10.4. Bidders are required to fully comply with the relevant SCM Legislative Framework as well as applicable applications of regulatory prescripts.
- 10.5. In the case of the service provider using sub-contractors, the former will be responsible for ensuring the delivery of services from any such sub-contractors and for making any payments to such sub-contractors.
- 10.6. The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (upon parties contracting).
- 10.7. Bidder must adhere to the Protection of Personal Information (POPI) Act.

## **11. ADJUDICATION USING A POINT SYSTEM**

- 11.1.1. The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 11.1.2. Preference points shall be calculated after the process has been brought to a comparative

basis taking into account all factors of non-firm prices.

- 11.1.3. 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 Act 5 of 2000.
- 11.1.4. 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.
- 11.1.5. Should two or more bids be equal in all respects, the award shall be decided by the drawing  
of lots.

## **12. SPECIFIC GOALS/POINTS FOR THIS BID WILL BE AWARDED AS FOLLOWS:**

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.

**Note: Evidence to be submitted by Emerging Micro Enterprise (EME) and Qualifying Small Enterprise (QSE) – sworn affidavit (DTI or CIPC Template, Generic entities – SANAS accreditation)**

- 12.1.1 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender will be interpreted to mean that preference points for specific goals are not claimed.
- 12.1.2 The organ of the state reserves the right to require a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences,  
in any manner required by the organ of the state.
- 12.1.3 Bidders who qualify as EMEs and QSEs in terms of the B-BBEE Act must submit a Sworn affidavit. Misrepresentation of the information constitutes a criminal offense.
- 12.1.4 Bidders other than EMEs or QSEs must submit their original and valid B-BBEE status level  
verification certificate and BBBEE Scorecard, substantiating their B-BBEE rating and black ownership issued by SANAS.
- 12.1.5 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.

#### 12.1.6 Consortium

12.1.7 A consortium is an association of two or more individuals, companies, organisations, or governments (or any combination of these entities) to participate in a common activity or pool their resources for achieving a common goal.

12.1.7 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 endeavor, particularly the division of profits. A consortium is formed by contract, which delegates the rights and obligations of each member.

12.1.8 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 an RFQ/Bid process are such that the lead partner is identified, and the requirements are as follows:

#### 11.6.1.1 Lead Partner

11.6.1.1.1 All administrative documents (consortium agreement between the lead partner and the partner)

11.6.1.1.2 Technical requirements (which will show in the proposal and other requirements why the need for the consortium, which for all intent and purpose fulfills the requirements of the bid through a combination of skills)

#### 11.6.1.2 Partner

11.6.1.2.1 Proof of CSD registration

11.6.1.2.2 Tax Pin

11.6.1.2.3 BBBEE Sworn-Affidavit

11.6.1.2.4 SBD 4

11.6.2 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 specific goals 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.

11.6.3 Of importance is that in a consortium, each individual team members retain their identity.

#### 12.1.7 A joint venture

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

#### 12.1.8 Unincorporated joint venture:

11.8.1 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:

11.8.1.1 SBD 4

11.8.1.2 SBD 6

11.8.1.3 Tax pin

11.8.1.4 CSD registration

11.8.1.5 The JV agreement will direct which bank account of the two entities will be used.

11.8.1.6 Consolidated Joint BBBEE Certificate.

#### 12.1.9 Incorporated joint venture

11.9.1 This is 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 completed with the name of the entity/company, and the name of the joint venture, and the following will be required amongst others:

11.9.1.1 SBD 4

11.9.1.2 SBD 6

11.9.1.3 Tax pin

11.9.1.4 CSD registration

11.9.1.5 The JV agreement will direct which bank account of the two entities will be used.

11.9.1.6 Consolidated Joint BBBEE Certificate.

### 13. COMMUNICATION

**13.1.** 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 the 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 (3) days before the closing date.**

**14. CONDITIONS TO BE OBSERVED WHEN BIDDING**

**14.1.** 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 that 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 Bib shall remain open for acceptance by the organization for a period of 60 days from the closing date of the BID Enquiry. INSETA reserves the right to:

14.1.1. Not evaluate and award a bid that does not comply strictly with this BID document.

14.1.2. Make a selection solely on the information received in the Bid document and enter into negotiations with any one or more of the preferred bidders(s) based on the criteria specified in the terms of reference.

14.1.3. 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 BID shall be sought, offered, or permitted.

14.1.4. Cancel this BID at any time as prescribed in the PPPFA.

14.1.5. Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the cost-effectiveness and the principle of value for money not necessarily on the basis of the lowest costs.

**15. COST OF BIDDING**

**15.1.** The bidder shall bear all costs and expenses associated with the 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.

**16. NOTE TO BIDDERS**

**16.1.** Due diligence to be conducted by INSETA prior to the award of the contract – where applicable.

**END OF DOCUMENT**