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| TERMS OF REFERENCE  FOR  THE APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF EMPLOYMENT WELLNESS SERVICES TO ALL NDA EMPLOYEES OVER A PERIOD OF THREE (3) YEARS  BID NUMBER: NDA35/CS15/19 | |
| **BRIEFING SESSION**  **VENUE** | A COMPULSORY BRIEFING SESSION WILL BE HELD ON THE **5TH AUGUST 2019 @ 09H30 to 10h30**  NDA HEAD OFFICE, MAIN BOARDROOM |
| **CLOSING DATE**  **CLOSING TIME** | **20 AUGUST 2019**  **14H00** |
| **SUBMISSION OF DOCUMENTS** | All proposals must be delivered at the NDA Head Office on or before the closing date and time. The Head Office address is: **26 Wellington Road, Parktown, Johannesburg**, 2193. Submissions must be strictly submitted inside the tender box which is at the main entrance and accessible 24/7.  ***Service providers outside of Gauteng are advised to send their documents by courier. NDA will not take responsibility for documents sent via postal services.*** |
| **SUPPLIER ENVELOPES** | The supplier's envelope/s MUST clearly have the description of this Bid "**Provision of Employee Wellness services to all NDA employees”**  **A TWO-ENVELOPE system will be used for the submission of quotations:**  **Commercial Envelope**  This envelope must contain price quotations plus all the mandatory documents as listed in section 9.1 of this document.  **Technical Envelope**  This envelope must contain all info listed in section 3 & 5 of this document. |
| **LATE BIDS** | Bids received after the closing date and time will not be accepted for consideration and where practicable, will be returned unopened to the Bidder(s). Contact person for Commercial queries is: **Ms Khanyi Mngomezulu on 011 018-5518 / 0791269278** between 08h30 and 17h00 on weekdays. Queries can also be sent in writing to [tenders@nda.org.za](mailto:tenders@nda.org.za) |

Table of Contents

## OVERVIEW OF THE NDA

The National Development Agency (NDA) is a public entity listed under Schedule 3A of the Public Finance Management Act (PFMA). The NDA was established in terms of the National Development Agency Act No 108 of 1998 as amended.

## Our Mandate

The NDA has two objects as mandated by Section 3 of the National Development Agency Act (Act No 108 of 1998 as amended).

The primary object of the NDA is to contribute towards the eradication of poverty and its causes by granting funds to Civil Society Organisations (CSO’s) for the purposes of:

* + Carrying out projects and programmes aimed at meeting development needs of poor communities, and
  + Strengthening the institutional capacity of other CSOs involved in direct service provision to poor communities.

The secondary objects of the NDA are:

1. To promote:

* Consultation, dialogue and sharing of development experience between Civil Society Organizations and relevant organs of state.
* Debate on development policy.

1. To undertake research and publication aimed at providing the basis for development policy

## Our Mission

Facilitate sustainable development by strengthening civil society organisations involved in poverty eradication through enhanced grant funding and research.

## Our Vision

A society free from poverty.

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## Our values

## Integrity

* Dignity
* Empowerment
* Accountability & Responsibility
* Transparency
* Excellence

1. **PURPOSE OF THE REQUEST FOR BIDS**

The NDA seeks to appoint a credible, accredited and experienced service provider to submit a comprehensive proposal in respect of offering the Employee Wellness Programme (EWP) to 200 NDA staff members nationwide. The EWP service provider will provide a three sixty-five (365) day, 24/7 confidential service through the service of a qualified, experienced, multilingual counsellor, offering both telephonic and face-to-face counselling. The duration of the contract with the selected service provider will be for three (3) years. The proposed budget should include all services mentioned in section 4 herein below.

1. **SPECIFIC OBJECTIVES**

This programme must contribute to the following objectives:-

* 1. To provide a professional, confidential, personal support and information service to NDA employees, spouse/partner and their immediate families for a period of three (3) years.
  2. Assist employees in preventing and/or remedying personal and family problems that adversely affect their well-being or potentially resulting in poor work performance.
  3. Maintain and improve the general well-being of employees through activities designed for promoting healthy lifestyles.
  4. Promote efficiency in the workplace that increases the opportunity for employee well-being and enhanced work performance, and
  5. Provide immediate, short-term crisis intervention in the event of traumatic incidents.
  6. Submission of annual implementation plan for Life Skills Development Programme by February of each year and Wellness Day Events as outlined in section 4 below.
  7. Quarterly reports on progress providing information services rendered and statistics of assisted employees and recommendations thereof.

1. **REQUIREMENTS FROM PARTICIPATING SERVICE PROVIDERS**

The following criteria will be used to select a qualifying accredited service provider to participate in this programme:

**Interested Service Providers must:**

* 1. Be registered with a professional body EAPSA – Attach Proof (valid registration certificate)
  2. Have capacity to offer Employee Wellness Programme for all services outlined in the scope of work in Section 4 below.
  3. Have offices and/or networks in all 9 provinces of South Africa: Attach Proof (office addresses, Service Level Agreements with network partners and their accreditation).
  4. Have counselors that can speak local languages in the allocated provinces.
  5. Have a minimum of 5 years in providing EAP services. Attach Proof (Reference letters with contact details where services have been rendered).
  6. Must have professionally qualified senior staff (team leaders) to offer counselling to the NDA staff members: (e.g. Psychologists, Legal Advisors, and Financial Advisors) attach their CVs. All professionals to attach a certificate of registration/affiliation with the relevant professional body.

1. **SCOPE OF WORK**

The Service Provider is expected to provide employees of the NDA and their immediate families with professional assistance covering the following, but not limited to:

* **Stress Management** (identifying the causes of stress, bereavement, coping strategies);
* **Financial Management** (money management, budgeting, credit and debt management etc);
* **Legal** (maintenance, child custody, divorce, customary law);
* **Relationship Management** (Marital, family and relationship problems, co-workers, partners, abusive relationships, friends);
* **Anti-Substance Abuse** (alcohol, drugs, prescription medication) and other addictive behaviours such as gambling;
* **Psychological Support** (Emotional or behavioural disorders)
* **Health Related Support** (chronic illnesses e.g. HIV, AIDS, cancer, nutritional and dietary illnesses);
* **Work Related Support** (job burnout, poor work relationships, poor work performance, conflict resolution, career matters, harassment); and
* **Trauma** **Debriefing both individual and group** (accidents, hijacking, loss, armed robberies).
* **Life skills development programmes** (Stress Management Workshops, HIV Awareness, Conflict Management Workshops, Change Management and other Wellness Awareness programmes)
* **Arrange Wellness Days** (Comprehensive testing: Glucose, Cholesterol, Blood Pressure, BMI, HIV, Massages, Dietician services and other Wellness activities)

1. **PROPOSAL CONTENT**

**The proposal must include the following:**

* 1. A company profile with background of your organisation, aims and objectives, methodology/approach that will be used in the implementation of the Employee Wellness Programme (EWP), including past experience in conducting Employee Wellness Programme (EWP) and a list of staff members to implement the programme.
  2. A detailed work plan with activities and timeframes.
  3. A detailed estimated budget with breakdown for providing this programme.
  4. A separate detailed proposal for the annual wellness day costings per province and head office must be submitted.

1. **NDA EMPLOYEE COVERAGE FOR EWP**

(Service provider must have scalability as this is a three-year contract and number of employees reflected below might change over the years)

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| **OFFICE/ PROVINCE** | **ESTIMATED NUMBER OF EMPLOYEES FOR WELLNESS DAYS EVENTS** |
| 1. National Office (Gauteng) | 84 |
| 1. Limpopo Province | 15 |
| 1. Mpumalanga Province | 14 |
| 1. Free State Province | 11 |
| 1. North West Province | 12 |
| 1. Northern Cape Province | 11 |
| 1. Gauteng Province | 12 |
| 1. Eastern Cape Province | 15 |
| 1. KZN Province | 15 |
| 1. Western Cape Province | 12 |
| **TOTAL** | **200** |

1. **TECHNICAL EVALUATION**

**Technical Evaluation will be scored as follows:**

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| **DESCRIPTION** | **WEIGHT**  **100 Points in Total** |
| **ACCREDITATION**  Registration with a professional body EAPSA – Attach Proof. (clause 3.1) | **14** |
| **RELEVANT EXPERIENCE** - Evidence of previous Employee Wellness Programme (EWP) work undertaken in other organisations (clauses 3.2 to 3.4) | **44** |
| 1. Experience – in operation for a minimum of 5 years (Detailed Company Profile) | *5* |
| 1. Footprint in the 9 provinces: Submit evidence of physical addresses for offices/agreements with EWP professionals in the provinces | *9* |
| 1. A detailed annual Workplan with activities and time frames | *30* |
| **CAPACITY - Personnel (Submit CVs - *2 points,* Qualifications – *2 points*, and Certificates from professional bodies – *5 points*)** (clause 3.6) | **36** |
| 1. Psychologists | *9* |
| 1. Social Workers | *9* |
| 1. Legal Advisors | *9* |
| 1. Financial Advisors | *9* |
| **REFERENCES** (clause 3.5) | **6** |
| Three (3) contactable references for Employee Wellness Programme or Employee Assistance Programme done for other organisations | *6* |
| Submit three (3) reference letters. Reference letters must be on the referee’s letterhead, signed by a duly authorized person, provide details of the services provided, and contract duration. |  |
| **Total score** | **100 Points** |
| **Minimum qualifying score** | **70 Points** |

* 1. **Clarification of the above score system**
     1. **ACCREDITATION = Total of 14 points (3.1)**

Service providers must submit evidence of registration with EAPSA. The registration must be for the company and not individuals in the company. Failure to submit evidence of registration with EAPSA will result to a score of zero (0). Submission of the certification will obtain the full 14 points.

* + 1. **EXPERIENCE = Total of 5 points (3.2)**

A detailed company profile must be submitted. If the submitted plan does not provide all the listed requirements, a score of zero will be allocated.

* + 1. **FOOTPRINT = Total of 9 points (clause 3.3)**

Submit evidence of national footprint and/or Service Level Agreements with network partners and their accreditation. A total of 1 point per footprint in a province will be allocated and Zero (0) points will be allocated should there be no footprint.

* + 1. **WORK PLAN = Total of 30 points (clause 5.3)**

Submit a detailed annual work plan with activities and timeframes. A total of 15 points will be allocated to detailed activities, another 15 to outlines and timeframes. Failure to provide this detail will result to a score of zero per missing requirement.

* + 1. **CAPACITY = Total of 36 points (clause 3.6)**

For each category of the required professional a total of nine (9) points will be allocated as follows:

* Provide CVs, qualifications and certificates with the relevant professional bodies of staff that will be assigned to the NDA for professional support.
* For each category of required professional, a total of 2 points will be allocated for a detailed CV, another 2 points for a copy of their qualification (Undergraduate degree will be acceptable) and the final 5 points for a copy of the registration certificate with the relevant professional body. A score of zero (0) will be allocated for failure to submit, per requirement not met.
  + 1. **REFERENCES = Total of 6 points**

Submit three (3) reference letters. Reference letters must be on the referee’s letterhead, signed by a duly authorized person, provide details of the services provided, and contract duration. A total of 2 points will be allocated per reference letter submitted. A score of zero (0) for failure to submit references will be obtained.

1. **COMMERCIAL EVALUATION**
   1. Bids will be evaluated in accordance with the Preferential Procurement Regulations, 2017, using the 80/20 preference points system as prescribed in the Preferential Procurement Policy Framework Act (PPPFA, Act 5 of 2000). The lowest acceptable bid will score 80 points for price and maximum of 20 points will be awarded for attaining the Broad-Based Black Economic Empowerment (B-BBEE) status level of contribution.
   2. The bid proposals received will be evaluated in two (2) phases. On the first phase bids will be evaluated on functionality and on the second phase in accordance with the 80/20 preference points system respectively.
   3. Bid proposal must score a minimum of seventy (70) points or more out of hundred (100) points on functionality in order to qualify for advancement to the next phase of evaluation. Second phase, a bid proposal scoring less than 70 out of 100 will not be considered for further evaluation and will be disqualified.
   4. Phase two: During this phase, bid proposals that passed the first phase will be further evaluated based on the 80/20 preference points system in accordance with the PPPFA Act, where 80 points will be attained in respect of price (the lowest acceptable bid will score 80 points and bidders that quoted higher prices will score lower points for price on a pro-rata basis) and 20 points will be awarded for attaining the Broad-Based Economic Empowerment (B-BBEE) status level of contribution in accordance with the table below:

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| 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 |

* 1. In order to claim the B-BBEE Status Level of Contributor, bidders must submit Sworn Affidavits or original and valid B-BBEE Status Level Verification Certificates or certified copies thereof, issued by accredited Verification Agencies such as SANAS or Registered Auditor approved by the IRBA together with their bids, to substantiate their B-BBEE claims. Exempted Micro Enterprises must submit a letter from the Accounting Officer who is appointed in terms of the Close Corporation Act.
  2. Bidders who do not submit B-BBEE Status Level Verification Certificate or are non-compliant contributors to B-BBEE do not qualify for preference points for B-BBEE, but will not be disqualified from the bidding process. They will score points out of 80 for price only and zero (0) points out of 20 for B-BBEE.
  3. Bidders are requested to complete the preference claim form (SBD 6.1 and 6.2) in order to claim preference points.
  4. The highest ranked bidder will be awarded the bid. It should be noted also that the NDA reserves the right not to appoint any service provider and no service provider will be reimbursed for any costs incurred whilst participating in this bid.
  5. **Pricing**
     1. Service providers must give a detailed cost breakdown for all applicable costs e.g. Initial setup costs, Escalation costs and any other additional charges.
     2. The costs for the annual wellness days must be detailed separately as per clause 5.4 above. Wellness day activities include: Comprehensive testing: Glucose, Cholesterol, Blood Pressure, BMI, HIV, Massages, Dietician services and other Wellness activities.
     3. Service providers must indicate if their prices will be fixed and firm for the duration of the proposed contract period, if not, the proposed escalations should be clearly indicated on the proposal/quotation. All prices submitted must be inclusive of VAT.
     4. Service Providers must ensure that the quotes submitted have no arithmetic errors as NDA will not rectify any errors and no adjustments to quotations received will be permitted after the closing date. The quotes should include all activities/services that will be required for the required services as no variations will be accepted unless mutually agreed by NDA and the service provider prior to contract acceptance.
     5. Service providers will carry the responsibility of ensuring that the proposals submitted have been signed by a dully authorised person. Should it be established after the submission of proposals that the signatory authorising the proposal is not legally appointed by the service provider, the offer/proposal will be disqualified from the evaluation process.
     6. All prices submitted should be typed in black ink or written in pen. No proposals written in pencil will be accepted or evaluated. Prices must show the total bid amount with vat included.

1. **MANDATORY DOCUMENTS**
   1. Price offer.
   2. Valid Tax Clearance Certificate issued by the South African Revenue Services (SARS) --- SARS tax pin and compliant CSD Report.
   3. A letter/resolution authorising the person signing the bid documents and contracts.
   4. Company registration documents (CIPC).
   5. Completed and signed SBD documents.
   6. ID copies of directors

Failure to submit any of the above requirements with the bid document will lead to disqualification.

**Central Supplier Database**

The NDA will not appoint any supplier that is not registered as a prospective supplier on the central supplier database as required by the National Treasury in terms of Circular No. 3 of 2015/16 and National Treasury Instruction Note 4 of 2016/17.

1. **PAYMENT TERMS**

Invoices will be paid 30-days from the date of submission.

1. **TENDER VALIDITY**

All submitted tenders must be valid for a period 120-days from the date of submission of bids.

1. **CONTRACTING**

Upon the finalization of the evaluation process, NDA’s legal department shall draft a SLA in line with the General Conditions of Contract to be signed by both parties.

1. **DISCLAIMER** 
   1. If a bidder finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in the bid or any other information provided by the NDA (other than minor clerical matters), the bidder must promptly notify NDA in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the NDA an opportunity to consider what corrective action is necessary (if any).
   2. Any actual discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by the NDA will, if possible, be corrected and provided to all bidders without attribution to the bidder who provided the written notice.
   3. No representations made by or on behalf of NDA in relation to this bid will be binding on the NDA unless that representation is expressly incorporated into the contract ultimately entered into between NDA and the successful bidder.
2. **ADDITIONS AND AMENDMENTS TO THE BID**
   1. The NDA reserves the right to change any information in, or to issue any addendum to this bid before the closing date and time. The NDA and its premises, employees and advisors will not be liable in connection with either the exercise of, or failure to exercise this right.
   2. If the NDA exercises its right to change information in terms of clause 14.1 all amendments will be posted on the NDA website and participating bidders will have the responsibility to regularly monitor the NDA website to ensure access to such changes.
   3. The NDA will immediately disqualify a bidder from the bidding process if the bidder fails to notify the NDA of the conflict as required.
3. **CONTENT PAGE**

Participating bidders are required to submit a detailed content page that clearly states (cross-reference) where each technical requirement as per section 3 and section 5 of this document is placed in their bid documents. Any additional information that we might have missed must be clearly referenced in the content page.