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Education, Training and Development Practices Sector Education and Training Authority

BID NO: SCMU: 10 – 2020/21

REQUEST FOR BIDS

TERMS OF REFERENCE FOR THE EMPLOYEE WELLNESS PROGRAMME (EWP) FOR THE ETDP SETA STAFF

1. INTRODUCTION

The Education Training and Development Practices Sector Education and Training Authority (ETDP SETA) is a public entity established in terms of Section 9(1) of the Skills Development Act, No 97 of 1998 to advance skills levels in accordance with the National Skills Development Strategy III. The Mandate of the ETDP SETA is to promote and facilitate the development and improvement of the skills profile of the sector's workforce in order to benefit employers, workers and employees in the ETD sector.

2. PROJECT SCOPE/ DELIVERABLES

2.1. PURPOSE OF THE PROJECT

The ETDP SETA is looking for Service Providers who have the experience and capacity to provide an integrated Employee Health and Wellness Programme to assist and support employees with their work related and or personal problems with the aim to improve their overall health and wellbeing in the Education Training Development Practices Sector Education Training Authority. (Hereafter "ETDP SETA").

The ideal goal of an Employee Health and Wellness Programme is to improve the organisational performance and to optimise the social functioning of the affected employees.

EWP is to be used by all the ETDP SETA employees and their immediate family members who experience psychological, psychiatric, legal and health problems either at work or at home.

The troubled employee is an individual whose work related and/or personal problems interfere significantly with job performance. Most employees spend the majority of their time at work. As a result, an employee brings personal problems to the workplace. Such problems are not easily compartmentalized and the behavior may be effected.

The EWP equip managers and supervisors with the knowledge and skills to know how to respond to problems of the troubled employees, thus assist the employees to improve approach to life.

In addition to poor service delivery, the image of the department could also suffer great harm with an unhappy workforce. EWP addresses a number of problems. These problems already manifest themselves in the workplace and they have been identified by Employment Relations Management as follows;

- Absenteeism
- High staff turnover
- Unsatisfactory work performance
- Loss of concentration
- Financial literacy and Debt management
- Lack of motivation and energy

- Emotional outbursts and improper conduct
- Family and household problems
- Stress levels
- Health issues
- HIV/AIDS
- Alcohol and Drug Abuse
- Non work related legal issues
- Threats of violence and Trauma
- Occupational health sicknesses

The EWP service is coordinated by Human Resource Development Coordinator (HRD).

3. PROFILE OF THE SERVICE PROVIDER

3.1. PROJECT OUTPUT/OUTCOMES

- 3.1.1. EWP should have specialist in Clinical Psychology, Psychiatric with hands on experience.
- 3.1.2. Counselling services must be available in the employee's language of choice.
- 3.1.3. To provide proof of experience in delivering a similar service.
- 3.1.4. To provide a minimum of three (3) references on a company letterhead.
- 3.1.5. Provide proof of registration with Employee Assistance Professionals Association of South Africa.
- 3.1.6. Trauma debriefing services must be made available if required.
- 3.1.7. The EWP service provider must provide an occupational health nurse in all the ETDP SETA offices as and when required.

3.2. PROJECT DELIVERABLES

- 3.2.1 Access to a 24-hour contact centre for the duration of the contract.
- 3.2.2 Communication access via SMS and call back service
- 3.2.3 Counselling and consultation (face-to-face and/or telephonic counselling)
- 3.2.4 Access to a branded online wellness service
- 3.2.5 Trauma management services including on-site management, should the need arise (group or individual)
- 3.2.6 The bidder must have proof of infrastructure /resource capacity and of existence
- 3.2.7 Provision of communication and health promotion information
- 3.2.8 Appropriate referral and managerial services
- 3.2.9 Management and employee orientation
- 3.2.10 Management of consultation services
- 3.2.11 Provision of training on health and wellbeing matters
- 3.2.12 Family care advice and resources
- 3.2.13 Wellness events
- 3.2.14 An occupational health nurse to provide occupational health services as and when required.

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4. SCOPE OF WORK

- 4.1.** The EWP service offering should cover the following services;
 - 4.1.1.** Consulting Services,
 - 4.1.2.** Programme Marketing,
 - 4.1.3.** Counselling Services,
 - 4.1.4.** Occupational Health Services
 - 4.1.5.** Online Wellness, and
 - 4.1.6.** Monitoring, Evaluation and Reporting.
- 4.2.** The EWP service provider shall render a 24-hour telephone contact during the duration of the contract to the ETDP SETA employees.
- 4.3.** The EWP service provider shall render electronic wellness services to all employee at all times.
- 4.4.** The EWP service provider shall provide onsite clinic and health services to all the ETDP SETA employees.
- 4.5.** The service provider should also be in a position to provide the following to the ETDP SETA employees;
 - 4.5.1.** Holistic Counselling in a form face to face counselling, telephonic, via an integrated 4th Industrial Revolution technology i.e. enabling service users to have a wider choice on how they can access those professional services beyond the traditional access, spiritual counselling and healing rooted in diverse religions and African traditional belief systems;
 - 4.5.2.** Life Management Services and referrals; and
 - 4.5.3.** Trauma counselling.
 - 4.5.4.** Screening and testing for occupational health diseases

4.6. DISEASE IMPACT MANAGEMENT

Provide chronic disease management programme to early identify employees with Chronic Disease of Lifestyle, to help them access medical care that mitigates complications like heart attacks and stroke.

4.7. ABSENTEEISM AND INCAPACITY MANAGEMENT

The service provider should assist the ETDP SETA in ascertaining the extent of absenteeism by;

- 4.7.1.** identifying key drivers of the identified trends,
 - 4.7.2.** identifying high-risk areas within the organisation,
 - 4.7.3.** identifying gaps in the relevant policies and procedures, and
 - 4.7.4.** craft a comprehensive gap closure strategy that will guide the ETDP SETA to effective absenteeism management.
- 4.8.** In the context of Incapacity due to ill health, injury, incapacity and disability management, the service provider should provide interventions to improve an affected employee's vocational potential to the extent that the employee remain in their original occupation.
 - 4.9.** The provision of the above intervention should be provided along the following:
 - 4.9.1.** Readiness in terms of fitness to return to own occupation
 - 4.9.2.** Functional capacity evaluations
 - 4.9.3.** Adaptations required to perform own job
 - 4.9.4.** Labour Law and labour requirements

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4.9.5. Guidance on reasonable accommodation

4.10. DISABILITY MANAGEMENT

Provides the ETDP SETA with disability management service that is based on a multidisciplinary assessment process with legal, ethical, occupational, financial and administrative components. Informed by an understanding of labour law, risk management, occupational medicine, disease management and rehabilitation.

4.11. OCCUPATIONAL HEALTH SERVICES

Provide an Occupational Health Service by conducting an occupational health risk assessment to identify hazards and exposure to risk and put appropriate interventions in place to ensure compliance with the Occupational Health and Safety Act 85 of 1993.

Have an Occupational Health Nurse on site as and when required to conduct screening and testing for occupational health diseases.

5. COSTING MODEL (PRICE SCHEDULE)
COST COMPARISON FOR THE EMPLOYEE WELLNESS PROGRAMME (EWP)

THIS COSTING MODEL MUST NOT BE MODIFIED AT ALL AND IF RETYPED ALL LINE ITEMS IN ORDER AS STATED BELOW TO BE INCLUDED.

COSTING FOR THE ETDP SETA AS PER THE REQUIREMENTS			
NAME OF BIDDING ORGANISATION:			
ITEM DESCRIPTION	COST PER HOUR	COST PER DAY	COST PER MONTH
Absenteeism			
High staff turnover			
Unsatisfactory work performance			
Loss of concentration			
Financial literacy and Debt management			
Lack of motivation and energy			
Emotional outbursts and improper conduct			
Family and household problems			
Stress levels			
Health issues			
HIV/AIDS			
Alcohol and Drug Abuse			
Non work related legal issues			
Threats of violence and Trauma			
Occupational Health Nurse (<i>Cost per hour only</i>)			
SUB-TOTAL			
VAT @ 15%			
TOTAL COSTS			

.....
Signature of Bidder

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6. DURATION OF THE PROJECT

The ETDP SETA will enter into a service level agreement for the period from **01 January 2021 to 31 March 2023 with an option to renew for two (2) more years. This will be based on satisfactory performance and as well as a need for such a service.**

The ETDP SETA may be amenable to a different service contract term for financial benefits or incentives, which bidders are to list separately if applicable.

7. EVALUATION CRITERIA

THE ETDP SETA applies the provisions of the **PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000** and **Preferential Procurement Regulations, 2017**. The evaluation will be guided by ETDP SETA procurement policy.

Folder A (USBs/ CDs) must have documents for Stage 1 and Stage 2

7.1. STAGE 1 (Folder A)

Bidders will be evaluated on the submission of the **requested mandatory documents**.

7.1.1. EVALUATION CRITERIA

1. Invitation to Bid - **SBD1**
2. Declaration of Interest – **SBD 4**
3. Declaration of Bidder's Past Supply Chain Practices – **SBD 8**
4. Certificate of Independent Bid Determination – **SBD 9**
5. Proof of registration with Employee Assistance Professionals Association of South Africa

NB: Failure to submit/comply with any of the above-requested mandatory documents will lead to disqualification.

7.2. STAGE 2 (Folder A)

During this stage, the evaluation of bids shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria as set out below.

- (a). The minimum qualifying score for functionality will be **70 points** and bids that fail to achieve the minimum qualifying score will be eliminated.
- (b). Only bids that achieved the minimum qualifying score/ percentage for functionality will be evaluated further in accordance with the **80/20 preference point systems prescribed in Preferential Procurement Regulations 5 and 6**.

The evaluation criteria for functionality will be as below:

NO.	CRITERIA	WEIGHT
1.	Experience of service providers in doing business of similar nature in a medium to large organization 1.1. Service Provider Experience in doing similar jobs in a medium to large organisation (employee wellness programme service) = 20 ○ 5 yrs and above = 20 ○ 3 - 4 yrs = 12 ○ 1 - 2 yrs = 8 1.2. Contactable references (on letter head of the referee) = 5 ○ Minimum of three (3) reference letters that must be aligned to the preferred medium and large organisation = 5	25
2.	Detailed communication approach for clients from different backgrounds: 15 Detailed means of communication / languages and their impact on the clients = 15	15
3.	Composition of the Project Team (attach CVs with indication of similar experience) Project team consulting experience in similar projects (attach CVs) : = 20 3.1. Project Manager = 10 • 5 yrs plus = 10 • 3 – 4 yrs = 5 • 1 – 2 yrs = 2 3.2. Consultation Manager Experience = 10 • 5 yrs plus = 10 • 3 – 4 yrs = 5 • 1 – 2 yrs = 2	20
4.	Bidders should submit a detailed project plan that include all aspects as indicated in section 4 (Scope of work). = 40 4.1 4.1. The EHWP service offered. = 6 4.2 4.2. The EWP service provider shall render a 24-hour telephone contact during the duration of the contract to the ETDP SETA employees.= 5 4.3 The EWP service provider shall render electronic wellness services to all employee at all times.= 5 4.4 The EWP service provider shall provide onsite clinic and health services to all the ETDP SETA employees. = 5 4.5 The service provider should also be in a position to provide the services as indicated in section 4.5 to the ETDP SETA employees; = 8 4.6 Provide chronic disease management programme = 4 4.7 The service provider should assist the ETDP SETA in ascertaining the extent of absenteeism = 5 4.8 The service provider should provide the ETDP SETA with disability management = 2	40
TOTAL		100

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Bidders must provide documents to justify awarding the above points, and such proof should include details of contactable references to Evaluation Criteria.

Points will be awarded on a sliding scale.

Please take note of the value and scoring point system of your bid

7.3. STAGE 3 (Folder B)

PRICING SCHEDULE DOCUMENTS

- a. Price Proposal – (*Price must be final, include VAT (if registered for VAT), signed and must be in the company's letterhead*)
- b. Valid Tax Clearance Certificate or “Unique security personal identification number (PIN) issued by SARS and must be on the SARS letter head”
- c. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2017 - **SBD 6.1 (if claiming preferential points)**
- d. B-BBEE certificate or sworn affidavit (*If claiming preferential points*)

80/20 preference point system shall be applicable as follows:

✓ Price	80
✓ B-BBEE status level of contributor	20

In order to facilitate a transparent selection process that allows equal opportunity to all service providers, the ETDP SETA will adhere to its policy on the appointment of service providers

8. BID CONDITIONS

The ETDP SETA Supply Chain Management Policy will apply:

1. ETDP SETA does not bind itself to appoint a bidder with the highest points.
2. ETDP SETA reserve the right to cancel the bid and not award the bid to any of the bidders.
3. Bids which are late, incomplete, unsigned or submitted by facsimile will **NOT** be accepted.
4. Bidders with a **turnover above R 10 million** must submit a valid certified B-BBEE Verification Certificate from **SANAS Accredited Verification Agency** in order to be eligible for empowerment points.
5. An Exempted Micro Enterprise (EME) is only required to submit a sworn affidavit or a Certificate issued by Companies and Intellectual Property Commission (CIPC) confirming their annual turnover of R 10 million or less and level of black ownership to claim points.
6. A Qualifying Small Enterprise (QSE), is required to submit a sworn affidavit confirming their **annual total revenue of between R 10 million and R 50 million** and **level of black ownership** or a B-BBEE level verification certificate to claim points as prescribed.
7. **B-BBEE Certificates obtained from Accountants/ Auditors after 31 December 2016 will no longer be accepted.**
8. Companies who bid as a joint venture must submit a **consolidated B-BBEE Verification certificate prepared for this bid only**, from **SANAS Accredited Verification Agency** in order to be eligible for empowerment points. Companies who form part of this joint venture **MUST** have an accreditation certificate with relevant authority as stated in Mandatory documents.
9. Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor, sworn affidavit or a B-BBEE Certificate, together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.
10. Bids submitted are to hold good for a period of 90 days.
11. Deregistered and blacklisted companies including directors/owners/individuals linked to the company will not be considered. Due diligence will be conducted with successful bidders to validate submitted information.
12. All suppliers must be registered on the **National Treasury Central Supplier Database**. No bid will be awarded to any supplier by ETDP SETA that is not registered on the Central Supplier Database.
13. Companies that are in the process of **de-registration in the CIPC** will not be considered.
14. The successful service provider **must** sign the penalty and termination clause as part of the agreement with ETDP SETA.

9. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation must be downloaded from the ETDP SETA website: www.etdpseta.org.za, Main Menu > Supply Chain > Procurement > Open Tenders as from 12h00 on **16 November 2020**.

Bidders must submit technical and financial proposals in **two separate USBs/ CDs** clearly marked **"Folder A - Technical Proposal"** and **"Folder B - Financial Proposal"**.

Folder B must include the **complete and signed costing model** and **Valid Tax Clearance Certificate or Unique security personal identification number (PIN) issued by SARS and must be in SARS letterhead (Mandatory) & fully completed SBD 6.1 form or B-BBE Certificate or a signed Sworn Affidavit (if claiming preferential points).**

The financial proposal – Folder B, will only be opened should the technical proposal be found acceptable.

All Bids/Proposals must be **SUBMITTED** via an email to Tenderers@etdpseta.org.za

OR

Hand / Courier delivered to:

ETDP SETA HOUSE

2-6 NEW STREET

SOUTH MASHALTOWN

GHANDI SQUARE

JOHANNESBURG

2061

Submissions can be delivered between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of **11h00 on 07 December 2020**.

No late submission will be accepted!

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00 on 07 December 2020**.

11. ENQUIRIES AND CORRESPONDENCES

NO telephonic or any other form of communication relating to this bid will be permitted with any other ETDPSETA member of staff either by Bidders (as collective bidding team or individual of the bidding team), representative of Bidders, associates of Bidders, shareholders of Bidders, other than with the named individual stated below. ANY MEANS OF ATTEMPTING TO INFLUENCE THE ADJUDICATION PROCESS OR OUTCOMES OF THE ADJUDICATION PROCESS WILL RESULT IN IMMEDIATE DISQUALIFICATION OF THE ENTIRE BID. All enquiries regarding this bid must be in writing only and be directed to:

Supply Chain Manager: Email: tenderers@etdpseta.org.za

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Note: Blacklisted companies appearing on the National Treasury database and prohibited from conducting business with public entities, will be disqualified.



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