

## Request for Proposals (RFP)

### The Provision of an Employee Wellness Programme to the CSIR

**RFP No. 3200/25/05/2018**

Date of Issue	Friday, 11 May 2018	
Compulsory Briefing Session	Friday, 18 May 2018 Venue: CSIR Pretoria, Building 22 Demo Room Time: 11:00 to 12:30	
Closing Date	Friday, 25 May 2018	
Place	Tender box, CSIR Main Reception, Gate 3 (North Gate)	
Enquiries	Strategic Procurement Unit	E-mail: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a>
CSIR business hours	08h00 – 16h30	
Category	Professional Services	

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## **SECTION A – TECHNICAL INFORMATION**

### **1 INTRODUCTION**

The Council for Scientific and Industrial Research (CSIR) is one of the leading scientific research and technology development organisations in Africa. In partnership with national and international research and technology institutions, CSIR undertakes directed and multidisciplinary research and technology innovation that contributes to the improvement of the quality of life of South Africans. The CSIR's main site is in Pretoria while it is represented in other provinces of South Africa through regional offices.

### **2 BACKGROUND**

The CSIR is committed and dedicated to putting its employees first. As the employer of choice, CSIR continuously provides platforms for employees to receive support to be productive in their personal and professional life. Unsatisfactory job performance, absenteeism, lateness, accidents are often early warning signs of deeper personal, professional and environmental problems. CSIR recognises that early detection and appropriate interventions to address personal, professional and environmental stressors can prevent or alleviate poor performance, accidents and absenteeism. To this end, it has put in place an Employee Wellness Programme (EWP) which seeks to empower employees with life skills in order to cope with difficult life and work related issues so that work performance is not affected.

#### **Aims**

The purpose of the Employee Wellness Programme is to support Wellness Office initiatives and improve the performance of CSIR by helping its employees to deal with their personal and work-related problems and challenges earlier, and more effectively. It also provides consultancy support and guidance for managers and supervisors to assist them with monitoring their employee's job performance, intervening early, and where necessary, to take appropriate action to correct the situation.

The CSIR appreciates the role and support family members play in employee's life, the fore extends the service to immediate family members. The programme provides extra support for employees in managing the circumstances of domestic life before these begin to impact on work.

### 3 INVITATION FOR PROPOSAL

Proposals are hereby invited for the Provision of an Employee Wellness Programme to the CSIR for a period of three (3) years.

### 4 PROPOSAL SPECIFICATION

All proposals are to be submitted in the format specified in this enquiry.

#### 4.1 SCOPE OF SERVICE – RETAINER OFFERING

Service offering is for 2 700 employees

REFERENCE OF SERVICE COMPONENTS	SERVICE DESCRIPTION
<b>SERVICES 1: COUNSELLING SERVICE</b>	
<ul style="list-style-type: none"> <li>• <b>Toll free telephonic supportive counselling</b>  (24/7/365) for employees and families. The Service shall be available in 11 official languages, with the national network matching CSIR’s geographic map.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Professional Support Line Service</b>  Via a 24/7/365 Call Centre. A 24-hour multilingual, psychological counselling service to be available to all eligible employees and immediate family members.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Personal Face to Face Counselling</b>  Model of 6-8 counselling sessions per employee per issue per year with additional two sessions at the discretion of the service provider. Face to face counselling for employees and family members</li> </ul>	<ul style="list-style-type: none"> <li>• <b>6-8(six) Personal Counselling (face to face) - sessions per person per year (per condition/incident) close to employee/family member residence or place of work.</b></li> <li>• Support and counselling for sexual harassment “victims”</li> <li>• Rehabilitation and counselling for sexual harassment “perpetrators”</li> <li>• Support and counselling for victims of unfair discrimination e.g. disabilities, homophobic, xenophobia etc.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Critical Incidence Services (Trauma debriefing)</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>A Critical Incident service</b> - offering prompt and professional trauma debriefing and counselling services to employees exposed to incidents of trauma.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Electronic on-line advisory services</b></li> </ul>	<ul style="list-style-type: none"> <li>• Access to a comprehensive <b>Online Wellness Programme</b>. The programme includes an integrated suite of email and web-based health management applications including interactive disease management tools; a selection of health and wellness information; a</li> </ul>

	<p>medical encyclopaedia; quizzes, and calculators; as well as personalised information on a range of employee wellbeing related topics such as stress management, substance abuse, and trauma management. Printable resources.</p>
<p>• <b>Management consultancy, referral and support program</b></p>	<ul style="list-style-type: none"> <li>• Service provider will provide: <ul style="list-style-type: none"> <li>-A managerial consultancy program.</li> <li>-Employee referral service to CSIR managers in support of their people management responsibilities.</li> </ul> </li> </ul>
<p><b>SERVICE 2: LIFE MANAGEMENT SERVICES</b></p>	
<ul style="list-style-type: none"> <li>• <b>Life management services:</b> <ul style="list-style-type: none"> <li>• Debt management and advocacy</li> <li>• Money management (Budgeting)</li> <li>• Legal advice and guidance</li> <li>• Family Care</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Life Management Services</b></li> <li>• A <b>legal wellbeing</b> service that provides CSIR employees with detailed practical information, education, counselling, resources and referrals on a broad range of legal matters, consumer affairs and social benefits. <b>Assistance on labour law matters is excluded from the service.</b></li> <li>• <b>Financial wellbeing:</b> This component of the service will assist employees who have queries relating to finances and debt.</li> <li>• A <b>debt mediation process</b> will be available to all employees who present with a negative cash flow situation in those geographies where such mediation is legislatively available.</li> <li>• <b>Family care support:</b> It will focus on the provision of information and guidance on a broad range of family related issues such as: parental guidance, disability benefits, educational and community resources, special needs placement, dependent care, child support, immigration, expatriate adjustment, alternative work arrangements, residential facilities, vocational guidance, community resources, preschool programmes and care giving guidance.</li> <li>• <b>Wills and Estate planning</b></li> <li>• <b>Basic contract draft and advise</b></li> </ul>

<b>SERVICE 3: MARKETING AND COMMUNICATION</b>	
<ul style="list-style-type: none"> <li>Marketing and communication</li> </ul>	<ul style="list-style-type: none"> <li>Custom-designed and continuing communication programmes to correctly position the EWP, ensure understanding and encourage all employees to use the service.</li> <li>The service provider must adopt CSIR Employee Wellness Programme branding and design</li> <li>The service provider shall utilise CSIR Employee Assistance Programme telephone number <b>(0800 222 615)</b></li> </ul>
<b>SERVICE 4: PROGRAMME MANAGEMENT</b>	
<ul style="list-style-type: none"> <li><b>Programme Management : Client services</b></li> </ul> <p><b>Strategy and policy development</b></p>	<ul style="list-style-type: none"> <li>A dedicated Client Relationship Manager will manage the EWP.</li> <li>The EWP to CSIR. This includes: service promotion and marketing, EWP related training, liaison with CSIR's EWP custodians, reporting, organizational consultancy and complaints resolution.</li> <li>Development of a group-level health and wellness strategy in close collaboration with Programme Leadership through a consultative process involving all Operating Divisions.</li> <li>Output will be a detailed strategy document outlining the strategic positioning of the programme, a detailed situational analysis, a comparison with international and local best practice, and an action plan.</li> </ul>
<ul style="list-style-type: none"> <li><b>Reporting Services – quarterly reporting</b></li> </ul>	<ul style="list-style-type: none"> <li>Reporting: <ul style="list-style-type: none"> <li>Statistics and calculations</li> <li>Data Analysis</li> <li>Engagement Rate</li> <li>Themes and trends</li> <li>Value</li> <li>Benchmarking</li> <li>Conclusions &amp; recommendations.</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li><b>Complaints Management</b></li> </ul>	<ul style="list-style-type: none"> <li>The service provider will address all complaints received from CSIR.</li> </ul>

<b>SERVICE 5: ABSENTEEISM AND INCAPACITY SOLUTIONS</b>	
Absenteeism and incapacity solutions.	<ul style="list-style-type: none"> <li>Absenteeism reporting, representation on incapacity panels and incapacity management training, and managerial support.</li> </ul>
<b>SERVICE 6: UNFAIR DISCRIMINATION AND SEXUAL HARRASMENT SUPPORT PROGRAM</b>	
Sexual harassment	<ul style="list-style-type: none"> <li>Provide trauma counselling and victim empowerment</li> <li>Mandatory counselling for perpetrators</li> <li>Diversity training</li> </ul>
Unfair discrimination (Gender, Race, Disability etc.)	

## 4.2 SCOPE OF SERVICE – ANNUAL OFFERING

The wellness testing will be done on +/- 1 320 employees that will be tested in a period of **15 days, with all assessments completed within 30 days of programme commencement.** The wellness days are scheduled for during the month of August.

The venues and wellness screening hours are as follows:

<b>Area</b>	<b>Address</b>	<b>Wellness Testing Days</b>	<b>Estimate No. of employees</b>
Durban	359 King George V (5TH) Avenue, Durban 4000	1 day wellness testing: 08:00 – 15:00	70
Pretoria	Meiring Naude Road, Pretoria	10 days wellness testing: 08:00 – 15:00	1 000
Johannesburg Cottesloe	Johannesburg Corner Newton and Frost Avenue Cottesloe	1 day wellness testing: 08:00 – 15:00	40
Johannesburg Carlow Road	Carlow-Corner of Rustenburg and Carlow Road	1 day wellness testing: 08:00 – 15:00	20
Port Elizabeth	Gomery Avenue, Port Elizabeth	1 day wellness testing: 08:00 – 15:00	40
Stellenbosch	11 Jan Celliers Street, Stellenbosch	1 day wellness testing: 08:00 – 15:00	80
Cape Town Rosebank	15 Lower Hope Road, Rosebank, CapeTown	1 day wellness testing: 08:00 – 15:00	70

REFERENCE OF SERVICE COMPONENTS	SERVICE DESCRIPTION
<b>SERVICE 1: ANNUAL EMPLOYEE HEALTH SCREENING</b>	
Wellness Screening	<p>The service rendering will include determining the following:</p> <ul style="list-style-type: none"> <li>• Weight</li> <li>• Height</li> <li>• Body Mass Index</li> <li>• Blood Pressure &amp; Pulse readings</li> <li>• Full Lipid Screening</li> <li>• Glucose levels</li> <li>• Provide appropriate health action recommendation based upon the results of each employee's screening results.</li> </ul> <p>The service provider will be responsible to fully manage the following;</p> <ul style="list-style-type: none"> <li>• Employee registration;</li> <li>• Data capturing of each employee's results directly after their assessment;</li> <li>• Wellness assessment activities;</li> <li>• Stock control;</li> <li>• Staff provisioning and comfort breaks;</li> <li>• Storing and transporting of stock after issuing,</li> <li>• Management of any issues that may arise during the assessments and</li> </ul> <p>A full report on the wellness results of employees, must be provided to CSIR Management to include results per region but not limited to the following:</p> <ul style="list-style-type: none"> <li>• Demographics of the employees tested</li> <li>• Health overview of the employees tested</li> <li>• Breakdown of medical schemes employees belong to per region</li> <li>• Quantum of employees per region not covered by a medical scheme</li> </ul>



**Service 2: ANNUAL EXECUTIVE MEDICAL HEALTH ASSESSMENTS – 19 LEADERSHIP  
(PRETORIA – MEIRING NAUDE)**

<ul style="list-style-type: none"> <li>• Medical Risk Appraisal</li> </ul>	<ul style="list-style-type: none"> <li>• Personal and family medical history</li> <li>• Nutritional status</li> <li>• Physical activity</li> <li>• Health habits</li> </ul>
<ul style="list-style-type: none"> <li>• Physical Assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Neurological</li> <li>• Cardiovascular</li> <li>• Height, weight, BMI, Waist and hip circumference and ratio</li> <li>• Resting and Effort ECG</li> <li>• Lung function screening</li> <li>• Visual and hearing</li> <li>• Ear, nose and throat</li> </ul>
<ul style="list-style-type: none"> <li>• Laboratory Investigations</li> </ul>	<p>Respiratory Gastrointestinal Musculoskeletal Lipogram Uric acid Glucose Liver and kidney functions Full blood count and ESR Stool (colon albumin) male and female &gt; 40 years old Prostate Specific Antigen test for male &gt; 40 years old Thyroid female &gt; 30 years old Pap smear for female HIV counselling and testing (upon request and consent)</p>
<ul style="list-style-type: none"> <li>• Radiological Investigations</li> </ul>	<p>Chest x ray for &gt; 40 on first visit/ every 5 years/ by referral Mammogram and bone density female &gt; 40 years old</p>

#### 4.3 SCOPE OF SERVICE – OTHER

12 Sessions per annum (60 employees per session)

REFERENCE OF SERVICE COMPONENTS	SERVICE DESCRIPTION
<b>SERVICE 1 AWARENESS EDUCATION AND TRAINING</b>	
<ul style="list-style-type: none"> <li>• <b>Awareness Sessions:</b></li> <li>• <b>EWP employee awareness sessions.</b></li> <li>• <b>EWP Managerial awareness sessions.</b></li> <li>• <b>Wellness Interventions and training: Specialists i.e. Dieticians, Biokineticists e.t.c</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Awareness presentations</b> for Eligible Employees, managers, supervisors and others who may need to be involved such as HR and Occupation Health personnel and staff committees. 2 Dieticians Per annum(PA) 1 Gynaecologist PA 2 Biokineticist PA 4 Medical Dr PA</li> </ul>

#### 4.4 SCOPE OF SERVICE – ADHOC

REFERENCE OF SERVICE COMPONENTS	SERVICE DESCRIPTION
<b>SERVICE 1: RESTRUCTURING, RETRENCHMENT AND SUPPORT SERVICES – PER INTERVENTION OF 10 PEOPLE</b>	
Restructuring, Retrenchment and support services	<ul style="list-style-type: none"> <li>• Effective and efficient programme to assist management of people aspect of organizational change to provide support, change surveys, training, group dynamics, groups and leadership coaching</li> </ul>
<b>SERVICE 2: CONFLICT MEDIATION – PER INTERVENTION OF 10 PEOPLE</b>	
Conflict management  To be done by industrial psychologists	<ul style="list-style-type: none"> <li>• Identify and respond to the adverse conflict risks within the organisation prior to them impacting negatively on productivity and service excellence</li> <li>• Build capacity for managers to use the service and to identify distressed employees and refer them to appropriate resources</li> <li>• One on One and group support interventions</li> <li>• Referral(Employee to Employee and Employer to Manger)</li> </ul>

<b>SERVICE 3: OTHER TESTS PER PERSON</b>	
<b>Other Tests</b>	<ul style="list-style-type: none"> <li>• Breast Cancer</li> <li>• Cervical cancer</li> <li>• Testicular cancer</li> <li>• Eye Tests</li> <li>• Hearing tests</li> <li>• Oral health</li> <li>• VCT-HIV (Price PP per test)</li> </ul>
<b>SERVICE 4: ILL HEALTH AND DISABILITY MANAGEMENT CONSULTATION SERVICES – RATE PER HOUR</b>	
Ill health management Reasonable accommodation on disability management  Prevention  Support and recovery	<ul style="list-style-type: none"> <li>• Ill health management in general</li> <li>• Advise on accessibility standards, duty to accommodate and assistive technologies</li> <li>• Advise on special working arrangements, occupational health and safety legislation and standards, emergency and continuity plans</li> <li>• Back to work adjustment and rehabilitation</li> </ul>
<b>SERVICE 5: ILL HEALTH AND DISABILITY MANAGEMENT – TRAINING (PER SESSION OF 10 PEOPLE)</b>	
Awareness and training	<ul style="list-style-type: none"> <li>• Breaking down various stereotypes</li> <li>• Diversity training</li> </ul>

## **GENERAL PROVISIONS**

Service providers will be expected to hand-over any employee files and any other relevant information as and when requested by the CSIR as per the Electronic Communications & Transactions Act 25 of 2002.

## 5 FUNCTIONAL EVALUATION CRITERIA

5.1 The evaluation of the functional / technical detail of the proposal will be based on the following criteria:

Functional Factors	Criteria Description	Weighting (%)
<b>Number of years rendering Employee Wellness Services.</b>	Number of years the company has been rendering Employee Wellness Programs. Company profile clearly indicating the number of years in business providing employee wellness services	10
<b>Client references</b>	The service provider must have dealt with large organisations of at least 2000 employees. At least three references (3) to be supplied Must have dealt with large organisations (Generic). The number of employees for the submitted references must be indicated	40
<b>Sample Feedback Reporting</b>	Provide a sample report of incidence report and usage of the service.	30
<b>Methodology and Approach</b>	The service provider must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in this document. A detailed approach, methodology and tools on how they will assist CSIR in achieving the objectives of this request must be provided.	20

5.2 Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of 70% and less than 70% on any of the individual criteria will be eliminated from further evaluation.

5.3 Refer to Annexure A for the scoring sheet that will be used to evaluate functionality.

## 6 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Submission after the deadline;
- Proposals submitted at incorrect location;
- Failure to submit proof of registration with the Employee Assistance Professionals Association of SA (EAPA-SA). A valid membership certificate must be provided;
- Failure to submit proof of registration of key staff with the Health Professional Council of SA (HPCSA). Valid certificates must be provided; and
- Non-attendance of the compulsory briefing session.

## 7 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE REGISTRATION

Before any negotiations will start with the winning bidder it will be required from the winning bidder to:

- be registered on National Treasury's Central Supplier Database (CSD). Registrations can be completed online at: [www.csd.gov.za](http://www.csd.gov.za);
- provide the CSIR of their CSD registration number; and
- provide the CSIR with a certified copy of their B-BBEE certificate. If no certificate can be provided, no points will be scored during the evaluation process. (RSA suppliers only)

## SECTION B – TERMS AND CONDITIONS

### 8 VENUE FOR PROPOSAL SUBMISSION

All proposals must be submitted at:

- **CSIR GATE 03 - Main Reception Area** (in the **Tender box**) at the following address  
Council for Scientific and Industrial Research (CSIR)  
Meiring Naudé Road  
Brummeria  
Pretoria

### 9 TENDER PROGRAMME

The tender program, as currently envisaged, incorporates the following key dates:

- Issue of tender documents: Friday, 11 May 2018
- Compulsory briefing session : Friday, 18 May 2018  
*(CSIR is a National Key Point, attendees must bring a form of identification)*
- Deadline for submission of enquiries: Tuesday, 22 May 2018
- Closing / submission Date: Friday, 25 May 2018

### 10 SUBMISSION OF PROPOSALS

**10.1** All proposals are to be sealed. No open proposals will be accepted.

**10.2** All proposals are to be clearly marked with the RFP number and the name of the tenderer on the outside of the main package. Proposals must consist of two parts, each of which is placed in a separate sealed package clearly marked:

**PART 1:** Technical Proposal: **RFP No. 3200/25/05/2018**

**PART 2:** Pricing Proposal and B-BBEE Documentation:

**RFP No.: 3200/25/05/2018**

**10.3** Proposals submitted by companies must be signed by a person or persons duly authorised. The CSIR will award the contract to qualified tenderer(s) whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price and B-BBEE.

## 11 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the address mentioned above no later than the closing date of **Friday, 25 May 2018** during CSIR's business hours. The CSIR business hours are between 08h00 and 16h30.

Where a proposal is not received by the CSIR by the due date and stipulated place, it will be regarded as a late tender. Late tenders will not be considered.

## 12 AWARDING OF TENDERS

**12.1** Awarding of tenders will be published on the National Treasury e-tender portal or the CSIR's tender website. No regret letters will be sent out.

## 13 EVALUATION PROCESS

### 13.1 Evaluation of proposals

All proposals will be evaluated by an evaluation team for functionality, price and B-BBEE. Based on the results of the evaluation process and upon successful negotiations, the CSIR will approve the awarding of the contract to successful tenderers.

A two-phase evaluation process will be followed.

- The first phase includes evaluation of **elimination** and **functionality criteria**.
- The second phase includes the evaluation of **price** and **B-BBEE** status.

Pricing Proposals will only be considered after functionality phase has been adjudicated and accepted. Only proposals that achieved the specified minimum qualification scores for functionality will be evaluated further using the preference points system.

### 13.2 Preference points system

*The 80/20 preference point system will be used where 80 points will be dedicated to price and 20 points to B-BBEE status.*

## 14 PRICING PROPOSAL

**14.1** Pricing proposal must be cross-referenced to the sections in the Technical Proposal. Any options offered must be clearly labelled. Separate pricing must be provided for each option offered to ensure that pricing comparisons are clear and unambiguous.

- 14.2** Price needs to be provided in South African Rand (excl. VAT), with details on price elements that are subject to escalation and exchange rate fluctuations clearly indicated.
- 14.3** Price should include additional cost elements such as freight, insurance until acceptance, duty where applicable.
- 14.4** Only firm prices\* will be accepted during the tender validity period. Non-firm prices\*\* (including prices subject to rates of exchange variations) will not be considered.

*\*Firm price is the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax which, in terms of a law or regulation is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;*

*\*\*Non-firm price is all prices other than "firm" prices.*

- 14.5** Payment will be according to the CSIR Payment Terms and Conditions.

## **15 VALIDITY PERIOD OF PROPOSAL**

Each **proposal** shall be valid for a minimum period of three (3) months calculated from the closing date.

## **16 APPOINTMENT OF SERVICE PROVIDER**

- 16.1** The contract will be awarded to the tenderer who scores the highest total number of points during the evaluation process, except where the law permits otherwise.
- 16.2** Appointment as a successful service provider shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement CSIR reserves the right to appoint an alternative supplier.
- 16.3** Awarding of contracts will be announced on the National Treasury website and no regret letters will be sent to unsuccessful bidders.



## **17 ENQUIRIES AND CONTACT WITH THE CSIR**

Any enquiry regarding this RFP shall be submitted in writing to CSIR at tender@csir.co.za with ***“RFP No. 3200/25/05/2018 - The Provision of an Employee Wellness Programme to the CSIR”*** as the subject.

Any other contact with CSIR personnel involved in this tender is not permitted during the RFP process other than as required through existing service arrangements or as requested by the CSIR as part of the RFP process.

## **18 MEDIUM OF COMMUNICATION**

All documentation submitted in response to this RFP must be in English.

## **19 COST OF PROPOSAL**

Tenderers are expected to fully acquaint themselves with the conditions, requirements and specifications of this RFP before submitting proposals. Each tenderer assumes all risks for resource commitment and expenses, direct or indirect, of proposal preparation and participation throughout the RFP process. The CSIR is not responsible directly or indirectly for any costs incurred by tenderers.

## **20 CORRECTNESS OF RESPONSES**

**20.1** The tenderer must confirm satisfaction regarding the correctness and validity of their proposal and that all prices and rates quoted cover all the work/items specified in the RFP. The prices and rates quoted must cover all obligations under any resulting contract.

**20.2** The tenderer accepts that any mistakes regarding prices and calculations will be at their own risk.

## 21 VERIFICATION OF DOCUMENTS

- 21.1** Tenderers should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by the CSIR in regard to anything arising from the fact that pages are missing or duplicated.
- 21.2** *One hard copy and one electronic copy (CD or USB memory key)* of each proposal must be submitted. In the event of a contradiction between the submitted copies, the hard copy shall take precedence.
- 21.3** Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.
- 21.4** If a courier service company is being used for delivery of the proposal document, the RFP description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered to the tender box, by the stipulated due date.

## 22 SUB-CONTRACTING

- 22.1** A tenderer will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer 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 tenderer qualifies for, unless the intended sub-contractor is an exempted micro enterprise that has the capability and ability to execute the sub-contract.
- 22.2** A tenderer awarded a contract may not sub-contract more than **25%** of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an exempted micro enterprise that has the capability and ability to execute the sub-contract.

## 23 ENGAGEMENT OF CONSULTANTS

The consultants will only be remunerated at the rates:

- 23.1** Determined in the "Guideline for fees", issued by the South African Institute of Chartered Accountants (SAICA); or
- 23.2** Set out in the "Guide on Hourly Fee Rates for Consultants", by the Department of Public Service and Administration (DPSA); or
- 23.3** Prescribed by the body - regulating the profession of the consultant.

## **24 TRAVEL EXPENSES**

**24.1** All travel expenses for the CSIR's account, be it directly via the CSIR's travel agent or indirectly via re-imburements, must be in line with the CSIR's travel policy. The following will apply:

24.1.1 Only economy class tickets will be used.

24.1.2 A maximum of R1300 per night for accommodation, dinner, breakfast and parking will be allowed.

24.1.3 No car rentals of more than a Group B will be accommodated.

## **25 ADDITIONAL TERMS AND CONDITIONS**

**25.1** A tenderer shall not assume that information and/or documents supplied to CSIR, at any time prior to this request, are still available to CSIR, and shall consequently not make any reference to such information document in its response to this request.

**25.2** Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.

**25.3** In case of proposal from a joint venture, the following must be submitted together with the proposal:

- Joint venture Agreement including split of work signed by both parties;
- The original or certified copy of the B-BBEE certificate of the joint venture;
- The Tax Clearance Certificate of each joint venture member;
- Proof of ownership/shareholder certificates/copies; and
- Company registration certificates.

**25.4** An omission to disclose material information, a factual inaccuracy, and/or a misrepresentation of fact may result in the disqualification of a tender, or cancellation of any subsequent contract.

**25.5** Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

## **26 CSIR RESERVES THE RIGHT TO**

- 26.1** Extend the closing date;
- 26.2** Verify any information contained in a proposal;
- 26.3** Request documentary proof regarding any tendering issue;
- 26.4** Give preference to locally manufactured goods;
- 26.5** Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);
- 26.6** Award this RFP as a whole or in part;
- 26.7** Cancel or withdraw this RFP as a whole or in part.

## **27 DISCLAIMER**

This RFP is a request for proposals only and not an offer document. Answers to this RFP must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submission of its proposal, tenderers shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFP. The CSIR makes no representation, warranty, assurance, guarantee or endorsements to tenderer concerning the RFP, whether with regard to its accuracy, completeness or otherwise and the CSIR shall have no liability towards the tenderer or any other party in connection therewith.

## DECLARATION BY TENDERER

**Only tenderers who completed the declaration below will be considered for evaluation.**

**RFP No: 3200/25/05/2018.**

I hereby undertake to render services described in the attached tendering documents to CSIR in accordance with the requirements and task directives / proposal specifications stipulated in **RFP No. 3200/25/05/2018** at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the CSIR during the validity period indicated and calculated from the closing date of the proposal.

I confirm that I am satisfied with regards to the correctness and validity of my proposal; that the price(s) and rate(s) quoted cover all the services specified in the proposal documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this proposal as the principal liable for the due fulfilment of this proposal.

I declare that I have no participation in any collusive practices with any tenderer or any other person regarding this or any other proposal.

I accept that the CSIR may take appropriate actions, deemed necessary, should there be a conflict of interest or if this declaration proves to be false.

I confirm that I am duly authorised to sign this proposal.

NAME (PRINT) .....

CAPACITY .....

SIGNATURE .....

NAME OF FIRM .....

DATE .....

WITNESSES	
1	.....
2	.....
DATE: .....	

**28 ANNEXURE A**

<b>Functional Factors</b>	<b>Proof Required</b>	<b>Weighting</b>	<b>0</b>	<b>7</b>	<b>10</b>
<p><b>Company Experience</b></p> <p>Number of years the company has been rendering Employee Wellness Services.</p>	<p>Company profile clearly indicating the number of years in business providing employee wellness services</p>	10	Less than 5 years	5 – 8 years	More than 8 years
<p><b>Client references.</b></p> <p>The service provider must have dealt with large organisations of at least 2000 employees. Must have dealt with large organisations (Generic).</p>	<p>At least three references (3) to be supplied The number of employees for the submitted references must be indicated. <b>Annexure C to be completed for each reference.</b></p>	40	Less than 3 references provided, or references are not for large organisations	3 – 5 positive references provided	More than 5 positive references provided
<p><b>Sample Feedback Reporting</b></p>	<p>Provide a sample report of incidence report and usage of the service</p>	30	Did not provide any sample report or did not understand requirements.	Report provided but not relevant to service requirements.	Report provided fully meets the requirements.
<p><b>Methodology and Approach</b></p>	<p>The service provider must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in this document. A detailed approach, methodology and tools on how they will assist CSIR in achieving the objectives of this request must be provided.</p>	20	Non-submission or poor methodology and approach submitted.	Approach is specifically tailored to suit the requirements and will meet the needs. The tools that will be used for the project are indicated.	The approach is innovative and well-articulated. The tools that will be used for the project are indicated.

## 29 ANNEXURE B RETURNABLE CHECKLIST

**NOTE:** The bidder is required to complete each and every schedule listed below to the best of his ability as the evaluation of tenders and the eventual contract will be based on the information provided by the bidder. Failure of a bidder to complete the schedules and forms to the satisfaction of the CSIR will inevitably prejudice the tender and may lead to rejection on the grounds that the tender is not responsive.

The bidder must complete the following returnable documents:

RETURNABLE DOCUMENTS –		
PART A: TECHNICAL RETURNABLES		
<b>ONE HARD COPY AND ONE ELECTRONIC COPY (CD OR USB MEMORY KEY)</b>		
Description	Included	
	Yes	No
Proof of registration with the Employee Assistance Professionals Associations of SA (EAPA-SA) – <b>(Provide certificate)</b>		
Proof of registration with the Health Professional Council of SA (HPCSA) – <b>(Provide certificate)</b>		
Proof of trainer’s relevant qualifications, in HR, Employee Relations or Law (with a major in Labour Law) – <b>(Provide certificate)</b>		
<p><b>Company Experience– (Company Profile)</b></p> <p>Number of years the company has been rendering Employee Assistance Programs. The company must have not less than 5 years training in medium to large organisations.</p>		
<p><b>Company References – (Client reference letters and completed Annexure Cs)</b></p> <p>The service provider must provide evidence that they have successfully provided and Employee Wellness Program. At least three references (3) to be supplied Must have dealt with large organisations (Generic).</p> <p>Reference letters must be provided to substantiate such claims. In addition to reference letters, the reference form, <b>Annexure C MUST be completed for each reference provided.</b></p>		
<p><b>Methodology and Approach including Work plan/timelines – (Detailed Methodology, Approach and Gantt Chart)</b></p> <p>The service provider must explain their understanding of the objectives of the assignment, approach to the assignment and the methodology for carrying out the assignment. The main activities of the assignment, their content and duration, phasing and interrelations, milestones, and delivery dates of the reports. The proposed work plan should be consistent with the approach and methodology.</p>		

<b>PART B: PRICING PROPOSAL</b>		
<b><i>ONE HARD COPY AND ONE ELECTRONIC COPY (CD OR USB MEMORY KEY)</i></b>		
<b>32</b>	Pricing Proposal	
<b>33</b>	B-BBEE Certificate	
<b>34</b>	Completed SBD1 Form	

***Any other relevant document may be submitted, to substantiate the bidder's proposal.***



**30 ANNEXURE C REFERENCE FORM**

**It is critical for the referee to complete the form fully. CSIR will not give scores for incomplete forms**

Referee Company legal Name: .....

Bid Description (reference provided for): .....

Describe the service/work done: .....

.....

.....

Project Start Date: ..... Project End Date: .....

Contract Amount: .....

Rate Service Provider (Put a mark to the relevant score)

Indicator	Excellent	Very good	Good	Poor	Unacceptable
Score	5	4	3	2	1

Would you use the service provider again: Yes / No

Referee Contact Person: .....

Referee Designation: .....

Referee Contact number: .....

Referee Email: .....

I hereby declare that to the best of my knowledge, information completed above is true and correct.

Bidder's referee signature: ..... Date: .....

**IN ADDITION TO REFERENCE LETTERS, THE FORM MUST BE COMPLETED FOR EACH REFERENCE SUBMITTED (FORM TO BE COMPLETED BY REFERENCE AND NOT BIDDER)**

### 31 ANNEXURE D PRICING SCHEDULE

#### 31.1 SCOPE OF SERVICE – RETAINER OFFERING

Service offering is for 2 700 employees

<b>Service Component</b>	<b>Year 1 (Excl. VAT)</b>	<b>Year 2 (Excl. VAT)</b>	<b>Year 3 (Excl. VAT)</b>
Counselling services			
Life Management Services			
Marketing and Communication			
Programme Management			
Absenteeism and incapacity solutions			
<b>Sub-Total</b>			
<b>VAT</b>			
<b>Total</b>			

#### 31.2 SCOPE OF SERVICE – ANNUAL OFFERING

<b>Service Component</b>	<b>Year 1 (Excl. VAT)</b>	<b>Year 2 (Excl. VAT)</b>	<b>Year 3 (Excl. VAT)</b>
Annual Employee Health Screening <b>(1 320 employees)</b>			
Annual Executive Medical Health Assessments <b>(19 leadership)</b>			
<b>Sub-Total</b>			
<b>VAT</b>			
<b>Total</b>			

### 31.3 SCOPE OF SERVICE – OTHER

12 Sessions per annum (60 employees per session)

<b>Service Component</b>	<b>Year 1 (Excl. VAT)</b>	<b>Year 2 (Excl. VAT)</b>	<b>Year 3 (Excl. VAT)</b>
Awareness education and training			
<b>Sub-Total</b>			
<b>VAT</b>			
<b>Total</b>			

### 31.4 SCOPE OF SERVICE – ADHOC

<b>Service Component</b>	<b>Year 1 (Excl. VAT)</b>	<b>Year 2 (Excl. VAT)</b>	<b>Year 3 (Excl. VAT)</b>
Restructuring and retrenchment and support services <b>(per intervention of 10 people)</b>			
Conflict Mediation <b>(per intervention of 10 people)</b>			
Ill health and Disability Management training <b>(per training session of 10 people)</b>			
<b>Sub-Total</b>			
<b>VAT</b>			
<b>Total</b>			

### 31.5 ILL HEALTH DISABILITY MANAGEMENT CONSULTATION SERVICES – RATE PER HOUR

<b>Service Component</b>	<b>Year 1 (Excl. VAT)</b>	<b>Year 2 (Excl. VAT)</b>	<b>Year 3 (Excl. VAT)</b>
Ill Health and Disability Management Consultation Services			
<b>Sub-Total</b>			
<b>VAT</b>			
<b>Total</b>			

### 31.6 OTHER TESTS – PER TEST PER PERSON

<b>Service Component</b>	<b>Year 1 (Excl. VAT)</b>	<b>Year 2 (Excl. VAT)</b>	<b>Year 3 (Excl. VAT)</b>
Breast Cancer			
Cervical Cancer			
Testicular Cancer			
Eye Tests			
Hearing Tests			
Oral Health			
VCT – HIV			
<b>Sub-Total</b>			
<b>VAT</b>			
<b>Total</b>			

**32 ANNEXURE E SBD1 FORM**