

# ANNEXURE A1 - Technical Evaluation Criteria

RFP 25/2021: PROVISION OF EMPLOYEE HEALTH AND WELLNESS SERVICES					
#	Technical Requirement	Weight	Guideline	Score	Comments
1	<b>Company Profile and Experience</b>	<b>2.00</b>			
1.1	The company's years of experience to render the employee assistance programme services as outlined in 9.2.	1	The Bidder has provided the following: • The company has 5 years or more of experience in rendering employee assistance programme = (1) • Less than 5 = (0)		
1.2	Infrastructure to render the services e.g. Mls Teams, Webex, Zoom	1	The Bidder has provided the following: • The Bidder has provided information on their company infrastructure (a secure virtual connectivity technology / learning material access)=(1) • No information provided = (0)		
2	<b>Resources</b>	<b>10.00</b>			
2.1	The bidder(s) to provide full contact details of a key account manager, with a minimum of three (3) years of experience who will be assigned to SARS including: • one page CV, containing his/her qualifications (certified copy of certificates)	1	The Bidder has provided the following: • The Bidder has submitted four (4) CV's of the key account manager including his/her role and responsibilities and, containing his/her qualifications (certified copy of certificates) = (1) • No information = (0)		
2.2	The bidder(s) has to provide curriculum vitae and proof of registration with HPCSA and SACSSP for a minimum of ten (10) call centre consultants. The curriculum vitae and proof of registration should be submitted for each call centre consultant.	5	The Bidder has provided the following: • Minimum of ten (10) CV's for all call centre consultants= (2.5) Less than 10 = (0) • Proof of active registration with HPCSA and/or SACSSP for all ten (10) consultants = (2.5) • Proof of active registration with HPCSA and/or SACSSP for less than ten (10) consultants or No information = (0)		
2.3	The bidder (s) has provided a minimum of two curriculum vitae of persons/team responsible for undertaking qualitative and quantitative research surveys and compiling reports. CV's must show qualification in research, data or statistical analysis and interpretation with the minimum of three years of experience in report writing.	4	The Bidder has provided the following: The Bidder has provided a minimum of two (2) CV's of persons /team responsible for undertaking qualitative and quantitative research/ surveys and report writing • 3 or more years of experience in qualitative and quantitative EAP report writing = (2) Less than 3 years= (0) • 2 or more years of experience in data and statistical analysis = (2) Less than 3 years = (0)		
3	<b>Psychosocial Awareness Session and Capacity Building</b>	<b>14.00</b>			
3.1	The bidder(s) has to provide curriculum vitae of minimum of four (4) qualified counsellors/clinical psychologists/social workers to facilitate psychosocial awareness sessions and train - the - trainer. CV should include the following: • Name and Surname • Relevant qualification (attach copy of certificate) • Years of experience in counselling	12	The Bidder(s) has provided the following: The Bidder has submitted four (4) CV's containing the following information: • Relevant qualifications for each facilitator • Master Degree or Minimum i.e. psychologists = (1) per each cv • 4 - Years Bachelor's Degree or Honours i.e. registered social worker and counsellors = (1) per each cv • No Bachelor's Degree, Master Degree or no information = 0 • Years of experience in counselling for each facilitator • More than 5 years experience and active registration with HPCSA and SACSSP = (1) per each cv • Less than 5 years experience or no information = 0		
3.2	The bidder(s) has to provide samples of proof of previously generated examples of Psycho-social awareness sessions material in line with paragraph 9.2.1.2 of the main RFP document.	1	The Bidder has provided the following: • Bidder has provided 8 samples of proof of previously generated examples of Psycho-social awareness sessions= (1) • Bidder has provided less than 8 samples of proof of previously generated examples of Psycho-social awareness sessions or No information = (0)		
3.3	The bidder(s) has to provide samples of proof of previously generated examples of Train-the-trainer material in line with paragraph 9.2.2.2 of the main RFP document.	1	The Bidder has provided the following: • Minimum of 4 samples of proof of previously generated examples of train the trainer material outlined in section 9.2.2 of the RFP (1) • Less than 4 = (0)		
4	<b>National Footprint</b>	<b>36.00</b>			
4.1	Provide a summary of the Bidder's database of network of specialists across the nine (9) regions by completing all columns in Annexure C1.	9	The Bidder has provided the following: • Presence in all regions in accordance with the ratio of 1:30 affiliates per SARS headcount = (9) • Presence in less than 9 regions or not in accordance with the ratio of 1:30 affiliates per SARS headcount = (0)		
4.2	The bidder(s) to confirm that national footprint can provide services in line with the minimum ratio of 1:30 (Affiliates against SARS Regional headcount) per each region (Refer to Table 9A of the RFP document for SARS Head Count per region).	18	The Bidder has provided the list of affiliates with the following core specialisations in all regions: • Counselling/clinical psychologists • Social workers • Registered counsellors		
4.3	The qualified clinical/counselling psychologists, registered counsellors and social workers should be scattered in all areas where employees and family members can easily access the sessions at the affiliate's practice rooms that are closer to place of residence or work.	9	• Bidder provided all above mentioned core specialisations = (2) points per each region • Bidder provided less than 3 core specialisations required = (1) per region • Bidder provided less than 2 core specialisations required = (0)		
	The bidder(s) must be able to offer services in the eleven official languages and including South African sign language.	9	The Bidder has provided the following: • Bidder indicated minimum of 3 languages inclusive of at least 1 dominant African language per region = (1) per region • Bidder indicated less than 3 languages inclusive of 1 dominant African language per region = (0) per region		
5	<b>Reports</b>	<b>5.00</b>			
5.1	The bidder(s) has to provide sample of proof of previously generated ad-hoc, monthly, quarterly and annual reports for employee assistance programme. The reports must reflect following: • Statistics and calculations • Update & Utilization • Themes and trends • Benchmarking • Training and interventions • Conclusions and recommendations	5	The Bidder has provided the following: Samples of proof of previously generated ad-hoc/monthly, quarterly and annual reports for employee assistance programme. • Statistics and calculations • Update & utilization • Themes and trends • Benchmarking • Training and interventions • Conclusions and recommendations All above mentioned = (5) Not mentioned above = (0)		
6	<b>Marketing and Awareness</b>	<b>2.00</b>			
6.1	The bidder(s) has to provide samples of proof of previously generated examples of posters, wallet cards, brochures, pamphlets, booklets, handbooks and any other branded communication material utilized at other companies.	1	The Bidder has provided the following: • Bidder has to provide samples of proof of previously generated examples of posters, wallet cards, brochures, pamphlets, booklets, handbooks and any other branded communication material utilized at other companies = (1) • Less than 3 = (0)		
6.2	The bidder(s) has to provide sample of proof of previously generated examples of project plan coordinated and implemented Health Calendar Days Campaigns in line with the National Health Calendar in section 9.2.3 of the RFP.	1	The Bidder has provided the following: • One (1) sample of proof of previously generated example of project plan for any of the campaigns coordinated and implemented as part of Health Calendar = (1) • No project plan sample is provided = (0)		
7	<b>Specialised Intervention</b>	<b>2.00</b>			
7.1	The bidder(s) has to submit CV's of pre-approved list with a minimum of six (6) recommended financial consultants (who are registered to provide advisory and debt management services) for the duration of the contract. The Bidders submission should include the following: Valid FASIS certificate for each recommended financial advisor/consultant A cv indicating years of experience in providing financial advice	2	The Bidder has provided the following: • 3 or more years of experience in financial advisor/consultants for all 6 = (2) • Less than 3 years experience for any or all = (0) • Submitted valid FASIS certificate for all = (1) • No FASIS certificate provided for any or all = (0)		
8	<b>Monitoring and Evaluation</b>	<b>1.00</b>			
8.1	The bidder(s) must submit to SARS proof/samples for previously generated example of client satisfaction survey.	1	The Bidder has provided the following: • One (1) each sample of proof for previously generated example of client satisfaction survey = (1) • No proof for previously generated example of client satisfaction survey = (0)		
9	<b>Record Keeping and Document Management</b>	<b>5.00</b>			
9.1	Describe your record keeping and document management system: • Describe how electronic, as well as paper-based, confidential client information will be stored and maintained; • Describe how to efficiently and effectively administrative process / procedure for audit purposes and for managing all employees and; • Describe how records are retained and destructed during and after the contract expiry date in line with the legislation.	5	The Bidder has provided the following: • A detailed description of how electronic, as well as paper-based, confidential client information will be stored and maintained = (3) • No information = (0) Failure to respond to this question will lead to non allocation of marks for both second and third points  The Bidder has provided the following: • A detailed description of how to efficiently and effectively administrator process / procedure for audit purposes and for managing all employees = (1) • No information = (0)  The Bidder has provided the following: • A detailed description of how records are retained and destructed during and after the time as prescribed in the applicable legislation and the contract expiry date = (1) • No information = (0)		
10	<b>Reference Letters</b>	<b>3.00</b>			
10.1	Provide reference letters from at least three (3) contactable clients on a company letter head, to whom similar services have been provided to in the past five (5) years. The reference letters must include: company name, contact person name and designation, phone number, email address, duration of contract, a brief description of the services rendered and the level of satisfaction with the service rendered.	3	Bidder has provided 3 recent reference letters from recent clients (not older than 5 years). The reference letters must include but not limited to: NB: One (1) point per letter distributed as follows: 1. Company name, contact person name and designation, phone number, email address and duration of contract. 2. A brief description of the services rendered (service should be aligned to the RFP document). 3. The level of satisfaction with the service rendered. All above mentioned = (1) per each letter Not all information= (0)		
	<b>Desktop Total</b>	<b>80.00</b>			
11	<b>Presentation</b>	<b>Weight</b>	<b>Guideline</b>		
11.1	The bidder(s) has demonstrated the operational capability including methodology, approach and process to execute an all-inclusive package of Employee Assistance Programme as specified in the SARS scope of work.	15	Bidder must provide in detail the description of the following processes: • Telephone handling procedure = (3), No information = (0) • Referral process= (3), No information = (0) • Reporting process= (3), No information = (0) • Describe and demonstrate your website content and how it can be linked to SARS website= (3). • No information = (0) • Describe and demonstrate marketing strategy (i.e. planning, execution and monitoring and evaluation)= (3), No information = (0)		
11.2	The bidder(s) to demonstrate the capability to integrate information from trend report and recommend customised intervention to address identified risk.	5	• The Bidder has provided a sample report = (2) No information = (0) • The Bidder's report identifies at least top 5 presenting problems and the risks for the organisation = (1) • No information = (0) • The Bidder's report provide recommendations and interventions that are linked to the identified top 5 problems/risks = (2) • No information = (0) If description of the service is not aligned to the RFP document bidder will get = (0) points		
	<b>Presentation Total</b>	<b>20.00</b>			