

**ANNEXURE: A**

**REFERENCE: RFP 29/2025**

**BUSINESS REQUIREMENTS SPECIFICATION (BRS) DESCRIPTION:**

**APPOINTMENT OF A SERVICE PROVIDER FOR A COMPREHENSIVE SARS EMPLOYEE  
HEALTH AND WELLNESS PROGRAMME**

## 1. INTRODUCTION

South African Revenue Service (SARS) hereby solicits the market to obtain suitably qualified services for the provision of a comprehensive employee health and wellness programme for a period of forty-eight (48) months on a non-exclusive basis.

## 2. OBJECTIVES

SARS intends to appoint a service provider to assist with enhancing employee wellbeing and drive business performance.

The appointed service provider must provide professional, confidential, and personalised support services to SARS for forty-eight (48) months.

## 3. SCOPE OF SERVICES

### 3.1 Psychosocial Support

The bidder(s) are expected to provide emotional support services to employees, their immediate family members, and household members. For this purpose, an “immediate family member” is defined as any member of the family that has a close and direct relation with a SARS employee. These include parents, stepparents, grandparents, children (biological/adopted) and siblings. “Household family member” is any individual who does not fall in any of the above categories but shares the same household with a SARS employee. Children aged seven (7) years and older should also be eligible to receive counselling. Support must be provided through face-to-face and/or virtual counselling, with six (6) sessions per person, per incident, per year. SARS will not enter into any cost-cutting negotiations after the award of the tender, such as reducing the number of sessions for which the bid was awarded. Any such attempt may result in termination of the contract.

If a referral is made to an institution outside the scope of services — such as psychiatric or rehabilitation institutions — where the employee will incur costs, the bidder(s) must inform the employee both verbally and in writing. In addition, such referrals must be reported to SARS’ Health and Wellness Manager.

The bidder(s) must also provide:

#### 3.1.1 Psychosocial services including but not limited to:

- a. Unlimited telephonic counselling;
- b. Individual face-to-face and/or virtual counselling (health, excessive gambling, gambling

- addiction, substance abuse management, psychosocial, relationship, marital, career counselling and work-related);
- c. Family counselling (group and/or individual) and including bereavement counselling;
  - d. Individual and group bereavement counselling;
  - e. Legal advice and support (excluding court representation and labour relations matters);
  - f. Retirement counselling;
  - g. Substance abuse management
    - Provision of support and guidance regarding substance (legal and illegal) abuse and how to manage it. Highlight the psychological effects of substance dependence on behaviour, family, work, relationships etc.
    - Roll out proactive, preventative and integrated psychosocial wellness interventions as informed by the report trends; and
  - h. The provision of therapeutic anti-stress massages (shoulder and neck) during Wellness Days and peak SARS periods, such as Revenue Drive and Tax Filing Season, should also be included. It is estimated that 1 500 SARS employees involved in the Revenue Drive and Tax Filing Season will partake per year.

### **3.1.2 Management services**

- a. The management of services must include formal referrals by managers;
- b. Manage and track end-to-end management and relevant role players' referral processes which include referred cases, reference number, tracking of case progress and intermediate feedback to the referring person and formal report; and
- c. Provide guidance for management and relevant role players on how to deal with employees presenting with behavioural patterns suggestive of underlying psychosocial issues.

### **3.1.3 Assisted referrals**

Allow non-managerial individuals (e.g. Wellness Consultants, Organised Labour and Human Resource Business Partners) to refer employees informally.

### **3.1.4 Organizational Change Support**

- a. Offer coaching support to line managers during organisational changes to equip them in handling sensitive and crucial conversations;
- b. Provide workshops and toolkits to help line managers recognise signs of distress and refer employees appropriately;
- c. Provide group sessions to equip employees with coping strategies, guidance, and tools for managing emotions and navigating ambiguity during organisational changes; and
- d. Individual counselling (onsite or virtual) for employees facing job insecurity, change fatigue, or emotional distress.

### 3.1.5 Trauma or Critical Incident Response

- a. Provide psychological and critical incident support after traumatic events face-to-face or virtually within 2 days;
- b. Group debriefing sessions or facilitated forums to process emotions and maintain team cohesion;
- c. Support for managers on how to respond to affected teams and maintain productivity during recovery and post-incident; and
- d. Follow-up support to affected individuals and referrals where necessary.

### 3.1.6 Digital Wellness Channel

3.1.6.1 Deliver a fully integrated end-to-end digital wellness solution for SARS personnel, offering a wide range of interactive health, wellness, psychological, financial, legal and disease management resources. This includes features such as:

- a. Expert Access: Online engagement tools like “Ask the Professional” for real-time support and guidance;
- b. Digital Platform Development: Creation of a dedicated health and wellness website and mobile applications;
- c. Smart Access Tools: QR code integration for seamless access to services, resources and support;
- d. Engagement Features: Online health risk assessments, fitness and wellness challenges, health and wellness webinars, podcasts, talks to digital communities;
- e. Promotional Campaigns: Regular online programme promotions and awareness drives; and
- f. Integrated Wellness Calendar: A dynamic health calendar embedded within the SARS digital ecosystem to support ongoing engagement and participation.

3.1.6.2 Provision of a health and wellness website, mobile apps, access QR coding, health assessments, health/exercise challenges, webinars, digital communities, programme promotions, active health calendar that is incorporated in the SARS digital space:

- a. Track fitness, log workouts, steps and activity levels;
- b. Monitor Nutrition – conduct personal nutritional/dietary assessment, record meals, count calories, and suggest healthy foods;
- c. Mental wellbeing hub/support toolkit – offer articles on various topics, newsletters, meditation, stress relief, including video content, brief self-assessments;
- d. Set Goals – Provide personalised health targets (distance to walk/run, weight loss, hydration);
- e. Sync with wearables – integrate with smart watches/fitness trackers;
- f. Educate and Motivate – give tips, reminders and progress insights; and
- g. Community support, AI-Driven insights, including doctor/coach connectivity.

- 3.1.6.3 A simple mental health support Application that has the following capability:
- Crisis resources – hotline, emergency contacts;
  - Community support – safe support groups or forums;
  - Access to referral system – self and managerial referral;
  - Therapist access – chat or video sessions;
  - Offline mode – access tools without internet;
  - Mood tracking – daily emotions, identify patterns and triggers;
  - Guided meditation & mindfulness – short sessions for stress, anxiety, sleep;
  - Psychosocial coping techniques and toolkit;
  - Breathing and Relaxation Techniques – calm panic attacks and anxiety quickly;
  - Sleep support – wind-down routines, white noise, and sleep tracking;
  - Journaling prompts – structured writing to process emotions; and
  - Personalised insights – AI-driven tips based on mood trends.

### 3.1.7 Psychosocial interventions

- The bidder(s) must provide, at a minimum, three hundred training interventions (training sessions, awareness sessions, and workshops) on a yearly basis, as determined by SARS.
- In this regard, over the period of the contract, bidder(s) must provide on a monthly basis: a minimum of 25 psychosocial interventions (one-hour awareness sessions, two-hour training interventions, one-hour health-related training interventions and/or four-hour workshops).


### 3.1.8 Capacity Building

The bidder(s) must provide at least 12 training interventions to equip internal wellness staff (EAP practitioners) on topical psychosocial issues. These topics must be delivered in a workshop format as determined by SARS.

All training materials (manuals, slideshow presentations, booklets, etc.) must be shared with the Wellness Consultants.

### 3.1.9 Marketing and Awareness

The bidder(s) must provide the following services related to marketing and awareness:

-  Marketing and awareness campaigns
  - The bidder(s) must create awareness of and promote wellness services by providing employees with the relevant soft copy wellness information material such as desk drop, screensavers, teasers, pocket-size tool kits/guides, posters, and newsletters;
  - The bidder(s) must create awareness of and promote wellness services and other related issues within SARS. This will be done on site (i.e. physically) and/or virtually;

- c. The bidder(s) must drive, coordinate and implement Health Calendar Days Campaigns in line with the National Health Calendar as informed by SARS' risks; and
- d. Bidder(s) to provide promotional material and items to encourage participation in Wellness events and activities.

### 3.1.10 Annual Health Calendar Events and Activities

Bidder(s) to provide an example of an Annual Health & Wellness Calendar of events, campaigns and Health conditions to be promoted / observed / commemorated.

Below is an example of the annual health calendar events and activities

Month	Health Calendar Days Campaigns
January	Psychological aspect of healthy living
February	Health Lifestyle Awareness Day
March	World Hearing Day World Kidney Day
April	Health Awareness Month
May	World Hand Hygiene Day Global Move for Health Day
June	Men's Health Month SANCA Drug Awareness Week
July	Mental Illness Awareness Month
August	CANSA Care Week
September	Heart Awareness Month National Oral Health Month Eye Care Awareness Month World Alzheimer's Day
October	Backache Awareness Week World Bone and Joint Week National Obesity Week World Trauma Day
November	World Diabetes Day National Children's Day
December	World Aids Day

**\*Notes:**

- A full list of annual health calendar events to be observed will be provided and jointly agreed upon at the beginning/end of each year, and one campaign per month must be implemented.

- The abovementioned campaigns will be coordinated and implemented annually for the duration of the contract.
- Each campaign will ideally include a speaker (i.e. relevant health and wellness professional, medical experts), health screening (e.g. cancer screening), and include campaign specific promotional materials.

### 3.1.11 Specialized Wellness Interventions

✚ The bidder(s) must:

- a. Offer virtual and, where required, onsite financial consulting services by trained, certified, and accredited financial advisors, including individual financial health assessments, debt management and repayment planning, and personalized financial reports. Services will be provided on an as-needed basis to individuals referred by the Workplace Wellness Unit; and
- b. SARS seeks to cultivate a culture of financial awareness by appointing accredited and certified financial advisory service providers to deliver virtual and face-to-face basic and advanced advisory services. This offering should be supplemented with digital tools for budgeting, expense tracking, and financial planning.

#### ✚ Basic Financial Literacy Awareness Programme

- a. To create awareness and educate employees on personal financial matters;
- b. To understand and improve financial skills such as budgeting, saving, living within one's means;
- c. Understanding income and expenditure;
- d. Healthy borrowing and unhealthy borrowing (good debt and bad debt);
- e. Basic Insurance and Investment;
- f. Understanding garnishee orders and implications thereof;
- g. Types of emergency financial assistance such as short-term loans for unexpected events etc;
- h. Debt counselling and debt review;
- i. Risks of not managing money effectively, e.g. gambling;
- j. Financial implications of marriage contracts; and
- k. Long-term implications of the two-pot retirement system.

#### ✚ Advanced, holistic managing finances masterclass

This programme should deliver an advanced, integrated and holistic financial well-being education and support programme that aims to empower employees for short-term financial wellbeing, as well as long-term investment and retirement preparedness.

Conduct advanced workshops in collaboration with SARS Remuneration and Benefits Unit,

to three different age groups, that is:

- 25 - 40 years
- 41 - 54 years
- 55 and older

The workshops should cover, amongst others, the following topics:

- Financial planning
- Debt management solutions
- Wills and estate planning
- The psychology of money – mental health and financial stress
- The importance of financial planning at different stages of work life
- Assist employees set retirement goals and strive to achieve them
- Equip employees about various investment options and strategies
- Offer personalised guidance to help employees assess their current financial status e.g. credit status and record
- One-on-one financial coaching

### 3.1.12 Headcount

The current total headcount of SARS is 14 300, as illustrated below, and this excludes family and household members.

**Table 1: SARS Headcount Per Region**

Regions	Headcount
Eastern Cape	657
Free State	487
Gauteng	4353
Head Office	3889
KwaZulu–Natal	1778
Limpopo	502
Mpumalanga	506
North West	349
Northern Cape	159
Western Cape	1620
<b>TOTAL</b>	<b>14 300</b>

- SARS is always amending working structures therefore the business areas and locations, as well as the number of employees per area will change.
- This is the headcount number as of 30 September 2025. This headcount number may vary



from month to month due to e.g. attrition and recruitments.

### 3.1.13 SARS National Footprint

The bidder(s) to confirm that it has a national footprint and can provide services in line with the table 1. The qualified Counselling/Clinical/Industrial and Organisational Psychologists, Registered Counsellors and Social workers should be in all areas so that employees and family members can easily access the sessions at an affiliate's practice rooms that are closest to their place of residence or work.

### 3.1.14 Reports

The bidder(s) must provide reports to SARS as and when required in the form of –

- Reports on individual formal/managerial referral cases.
- Quality assurance processes - generation of statistics and trend analysis reports.
- Monthly dashboard reports, monthly reports on cases taken over from the outgoing Service Provider, quarterly and annual reports with trends and themes.
- Demonstration of Return-on-Investment model.
- Lifestyle Management - Lifestyle management services for high-risk employees, which include legal and financial services but is not limited to this.
- Ad hoc reports.

### 3.1.15 Meeting

- The bidder(s) shall attend the following meetings –
  - EAP – two meetings every month for the first three (3) months and thereafter, once a month;
  - Monthly, quarterly and annually meetings to present reports;
  - an annual meeting to present the annual report; and
  - Supplier Relationship Review meetings, as and when required.
- The bidder(s) shall have sufficient data for all virtual meetings.
- The bidder(s) shall draft an action plan at the end of every meeting, which plan will contain timeframes.
- The bidder(s) shall perform regular follow-ups on action plans adopted at meetings and liaise with SARS' Workplace Wellness team for action plans that were indicated for SARS.
- The bidder(s) shall carry all secretarial responsibilities relating to any meetings held with SARS.

### 3.1.16 Complaints Procedures

- The bidder(s) must ensure that complaints relating to service failures are well documented by completion of complaint forms.

- The bidder(s) must ensure that information pertaining to service failures are consolidated in its Monthly Reports to SARS.
- The bidder(s) must advise of risk mitigation measures that will be implemented to avoid the re-occurrence of the complaint / service failure.
- All complaints will be logged by the Key Account Manager.
- Receipt of complaints must be acknowledged within 1 business day of receipt.
- The Key Account Manager is responsible for ensuring appropriate referral within the bidder(s).
- The complaint remains active until closed by the Key Account Manager.
- Response times:
  - Immediate autoreply if complaint sent electronically;
  - Initial feedback within 24 hours; and
  - Resolution of complaints within 72 hours of receipt thereof.

### 3.1.17 Confidentiality

Confidentiality is the cornerstone of both an Employee Assistance Programme (EAP) and other components of an Employee Wellness Programme (EWP). The bidder(s) should at all times be consistent with relevant professional codes of ethics and practices as set out by the relevant professional bodies and/or other related statutory and regulatory provisions, including the Health Professions Council of South Africa (HPCSA). This further entails that personal/identifying details including the nature of psychosocial problems of individuals who accessed various support on their own should not be provided to SARS, unless written consent is provided by the individual on a "need-to-know" basis.

In cases of managerial referrals, identification of employees is inevitable. Thus, only the "need-to-know" information should be shared with the referring line manager on whether the support provided was effective, how the employee should be supported as well as strategies on managing the employee going forward. However, information shared by the individual that poses a life threat to own or other persons or own or other people's properties including organisation/SARS properties; involvement in fraudulent activities; in cases of child abuse as well as court subpoenas should be dealt with in accordance with the clear clinical protocols and in compliance with any applicable legislation.

### 3.1.18 Conditions of Services

The bidder(s) must ensure that:

- Telephonic and face-to-face and/or virtual support is offered through a countrywide network of professional EAP affiliates. All the affiliates must be registered with the relevant professional bodies;
- The telephone service is staffed by registered professionals (i.e. psychologists, social

workers and counsellors) and is personally answered 24 hours a day, 7 days a week and 365 days per year;

- The toll-free number provides employees with language options in all eleven (11) official languages of South Africa;
- Bidder(s) must be able to offer services in the eleven official languages, including South African sign language (where possible). *In this regard*, a minimum of three languages per province inclusive of at least one dominant African language, should be provided by a bidder thus ensuring coverage of at least one language per province.
- The bidder(s) must have due regard to SARS' employees with disabilities and must make adequate provision for such employees;
- The bidder(s) must have a Call Centre (capacity), which is a physical location and with a minimum of 10 defined seats occupied at all times; and
- The bidder(s) must have a wellness website that can be linked to the SARS intranet.

### 3.1.19 Access to Services

The bidder(s) must ensure that the following mediums are used to allow access to services:

- Telephone; the toll-free number should be free and/or not limited to the landline;
- Email: A dedicated email address must be made available to SARS. The dedicated email address must have an automated response that indicates expected turn-around times;
- Independent dedicated email address for gender-based violence related matters;
- Microsoft Teams and Webex;
- "Please call me" service. A 10-digit cellular phone number must be made available to SARS employees (this should also function as a WhatsApp number);
- Retention of the current SARS toll-free number ; and
- Interactive WhatsApp Bot service.

### 3.1.20 Value-Added Services

The bidder(s) is required to establish a memorandum of understanding and partnerships with health and fitness companies. These agreements will enable the bidder(s) to access the SARS market and promote health and fitness services, including gym memberships, while providing SARS with support for Wellness Days and other business seasons:

- a. Support in the form of offering team health and fitness activities such as Aerobics, Zumba, Yoga, Meditation and other related classes as needed, at no cost; and
- b. Occasional access to fitness centres should be provided for team bonding activities at no additional charge.

## 4. SARS REQUIREMENTS FROM THE BIDDER(S) / BIDDER(S) RESPONSE

Bidder(s) must respond to all the information required in this paragraph in their bid proposals.

Bidder(s) should also refer to paragraph 3, which details the background, scope of service and technical requirements.

#### 4.1 COMPANY PROFILE, EXPERIENCE AND INFRASTRUCTURE

The bidder(s) must provide a comprehensive company profile detailing:

- 4.1.1 Company has ten years' experience in implementing and managing Employee Wellness Programmes and Employee Assistance Programmes in a corporate environment for medium to large enterprises with a minimum of 8000 employees.
- 4.1.2 Proof of membership with Employee Assistance Professionals Association of South Africa (EAPA-SA) and/or Workplace Wellness Association of Southern Africa (WWASA).

#### 4.2 RESOURCES

The bidder(s) should provide the following detail in their response:

- 4.2.1 The bidder(s) must provide full contact details of the Key Account Manager, with a minimum of five (5) years of experience in employee health and wellness programmes, who will be assigned to SARS, including:
  - a curriculum vitae (CV), containing his/her qualifications (certified copy of certificates required).
- 4.2.2 The bidder(s) must provide full contact details of the five (5) Client Relationship Managers, with a minimum of five (5) years of experience in employee health and wellness programmes, who will be assigned to SARS, including:
  - a CV for each Client Relationship Manager, containing his/her qualifications (certified copy of certificates required).
- 4.2.3 The bidder(s) must submit the following for each of at least ten (10) call-centre consultants:
  - A CV indicating a minimum of five (5) years' experience as a call-centre consultant in the employee health and wellness industry.
  - A valid proof of active registration with the HPCSA and/or the South African Council for Social Service Professions (SACSSP).

**N.B. Each CV must be signed by both the Bidder's authorised representative and the proposed Key Personnel to confirm its accuracy and completeness.**

#### 4.3 NATIONAL FOOTPRINT

The bidder(s) must provide a summary of the bidder's database of network of affiliates across the nine (9) regions by completing all columns in Annexure C. The bidder must confirm that it has a national footprint and can provide services in line with the table 1 (Affiliates against SARS Regional headcount). The qualified Counselling/Clinical/Industrial and Organisational

Psychologists, Registered Counsellors and Social workers should be in all areas where employees and family members can easily access the sessions at the affiliate's practice rooms that are closest to their place of residence or work.

The bidder must indicate a minimum of three languages per province, inclusive of at least one dominant African language.

#### **4.4 PSYCHOSOCIAL INTERVENTIONS**

The bidder(s) must provide a product catalogue of developed psychosocial interventions. The product catalogue must have the following in respect of each intervention:

- Intervention name with duration;
- Description and Outcomes;
- Outline of Intervention; and
- Target audience (leadership / management / employees).

#### **4.5 CAPACITY BUILDING**

The bidder(s) must provide a product catalogue of developed Train-the-trainer topics.

#### **4.6 SPECIALISED INTERVENTION**

The bidder(s) must submit CVs of a 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 bidder(s) submission must include the following:

- A valid Financial Advisory and Intermediary Services (FAIS) certificate for each recommended financial advisor/consultant.
- A CV with a minimum of three (3) years' experience indicating years of experience in providing financial advice.

**N.B. Each CV must be signed by both the Bidder's authorised representative and the proposed Key Personnel to confirm its accuracy and completeness.**

#### **4.7 REPORTS**

The bidder(s) to provide samples of reports previously generated for employee assistance programmes. A sample report should be submitted for each of the following aspects:

- Reports on individual formal/managerial referral cases.
- Quality assurance processes - generation of statistics and trend analysis reports.

- Monthly dashboard, quarterly and annual reports with trends and themes.
- Demonstration of Return-on-Investment model.
- Lifestyle Management - Lifestyle management services for high-risk employees, which include legal and financial services but is not limited to this.

#### **4.8 MARKETING AND AWARENESS**

- 4.8.1 The bidder(s) must provide samples of previously generated examples of posters, wallet cards, brochures, pamphlets, booklets, gazebos, banners, handbooks and any other branded communication material utilized at other companies.
- 4.8.2 The bidder(s) must provide a product catalogue of developed project plans that have been coordinated and implemented for Health Calendar Days campaigns, in line with the National Health Calendar.

#### **4.9 REFERENCES LETTERS**

Provide reference letters from at least three (3) contactable clients, on a company letterhead, 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, the level of satisfaction with the service rendered and quality of the reports.

#### **4.10 PRESENTATION**

A bidder(s) must demonstrate an end-to-end digital wellness solution that seamlessly integrates multiple support services — including health, psychological, financial, legal, disease management, and data privacy and security — into a single platform. The demonstration must clearly prove that the solution is interactive, secure, user-friendly, and specifically tailored to meet the needs of SARS personnel.