

Provision of Employee Health and Wellness related services

Briefing Session	17 October 2016 14h00
RFP No	RFP 27/2016
Closing Date	07 November 2016, 11h00

Bid Evaluation Committee

SARS Procurement

Sourcing Lead

Price Evaluator

BBBEE Evaluator

Governance, Compliance & Risk Specialist – Audit

Contract Specialist

Tender Office – Pre-Qualification

SARS Business Unit

Senior Manager: Health and Wellness

Consultant: Health and Wellness (x 2)

Price Evaluator

SARS Corporate Legal Services

Specialist: Corporate Legal Services

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RFP Timelines

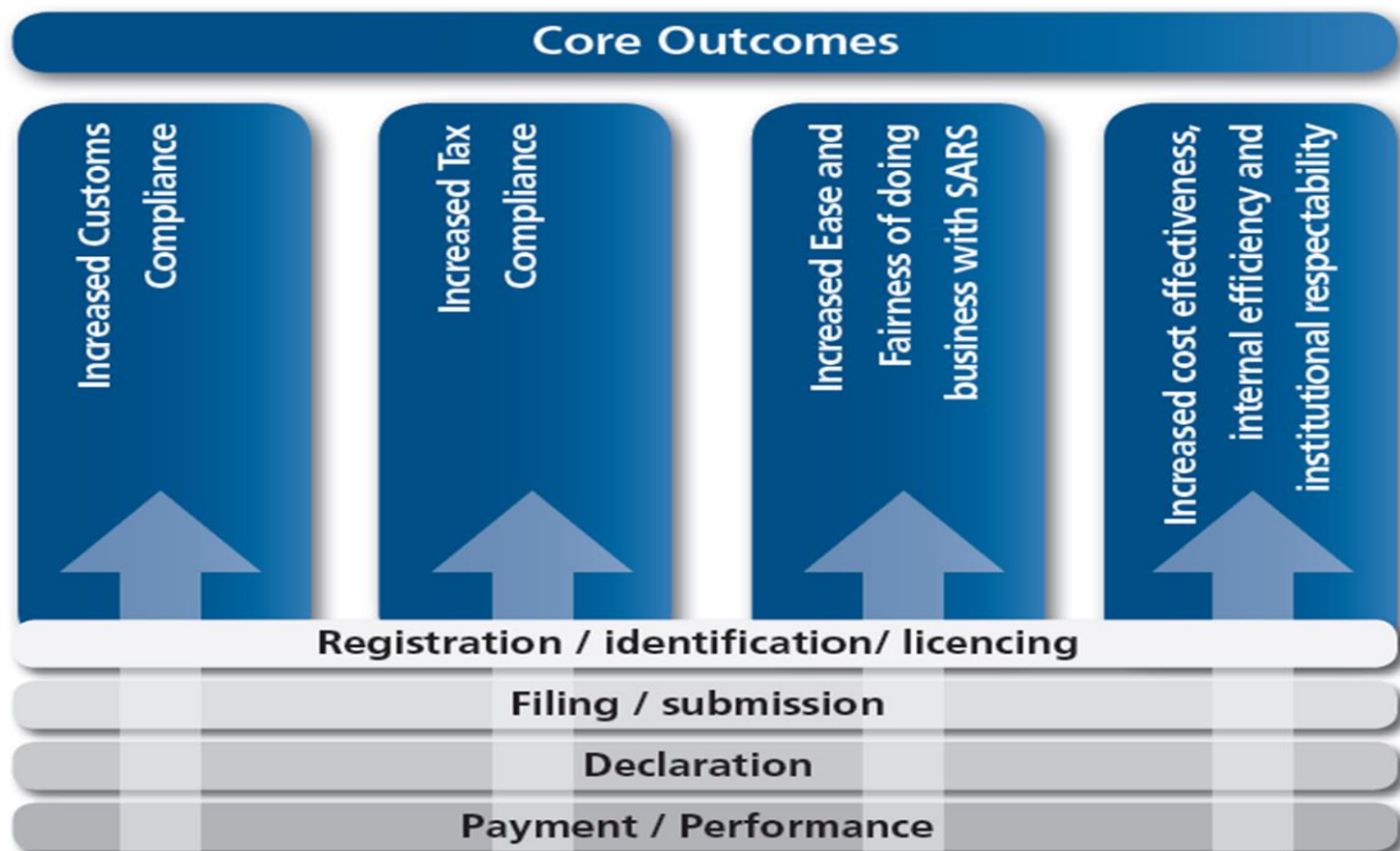
ACTIVITY	DUE DATE
RFP Advertisement on NT eTender portal	07 October 2016
RFP Advertisement in Government Tender Bulletin	07 October 2016
Tender documents on SARS website	10 October 2016
Non-Compulsory briefing session	17 October 2016, 14H00
Questions relating to RFP	31 October 2016
RFP Closing Date	07 November 2016, 11h00
Notice to bidders	February 2017

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Background

As an organ of state, SARS's mandate outlines its obligations towards the state and its people by:



Background Cont....

The SARS Workplace Wellness:

- SARS recognised the importance of its employees and thus realised that employees may experience a wide range of issues impacting their work-life balance, families, health/wellness, or job performance.
- SARS wellness programme was introduced in 2005.
- Based on the EAPA-SA standard number 3 (Service Delivery Models and Procedures), SARS elected to apply a Hybrid Model of wellness service delivery (i.e. combined external and internal providers).
- The role of external provider in this model is to provide mainly psychosocial and lifestyle services through the network of mental health professionals, legal and financial advisors.
- The relationship between EAP utilisation and absence rate in SARS clearly shows that as the utilisation has decreased over the past year, this has been paralleled by an increase in absence rate.
- There is therefore a huge need to address the identified risks through targeted interventions and effective utilisation of the EAP services.

Background Cont....

The objectives of SARS Workplace Wellness:

- Strategically invest and improve the quality of life of all employees by providing health and psychosocial support and recognition of employees as a totality
- Alleviate the impact of everyday work, personal and family problems; and
- Ensure legal compliance with legislative and regulatory occupational frameworks requirements.

In order to achieve these objectives SARS seeks to appoint service provider(s) to render the following:

- Employee Assistance Programme (Category A)
- Executive Wellness Programme (Category B)

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Scope of Work

Refer to section 9.2 of RFP document for scope of work and requirements for Employee Assistance Programme (Category A)

Refer to section 9.2 of RFP document for scope of work and requirements for Executive Wellness Programme (Category B)

Scope of Work – Employee Assistance Programme (Category A)

- Psychosocial services
- Conditions of services
- Access to services
- Customer services
- Marketing and awareness

Scope of Work – Executive Wellness Programme (Category B)

- Comprehensive offsite health assessment
 - Full medical review
 - Nutritional assessment
 - Pathology screen
 - Biokinetic Assessment
 - Detailed personal report
- Medical record keeping and document management
- Reporting
- Management of the service

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Bid Evaluation Process Gate 0: Pre-Qualification Criteria

The following documents must be submitted for pre-qualification Gate 0 for both Category A and Category B:

Name of Document that must be submitted	Non-submission may result in disqualification?
Original and valid Tax Clearance Certificate – SBD 2	YES
SARS' s Oath of Secrecy	YES
Invitation to Bid – SBD 1	YES
Pricing Schedule – Annexure B1 and/or Annexure B2	YES
Declaration of Interest – SBD 4	YES
Preference Point Claim Form - SBD 6.1	NO
Declaration of Bidder's Past Supply Chain Management Practices – SBD 8	YES
Certificate of Independent Bid Determination – SBD 9	YES
Central Registration Report (Central Database System) from National Treasury	YES

Bid Evaluation Process Gate 1

The Bidder(s)' information will be scored according to the following points system:

	Functionality	Maximum Points Achievable	Minimum Threshold
Category A – Employee Assistance Programme	Desktop Technical Evaluation Details in Annexure A1 – Category A technical scorecard	70	49
	Site visit and/or presentation	30	N/A
	Overall Combined Score	100	70
Category B – Executive Wellness Programme	Desktop Technical Evaluation Details in Annexure A2 – Category B technical scorecard	70	49
	Site visit and/or presentation	30	N/A
	Overall Combined Score	100	70

Each category will be evaluated out of 100 points. The overall combined score for each category must be equal or above 70 points in order to proceed to Gate 2 for Price and BBBEE Evaluation.

Bidders must refer to Annexure A 1 and Annexure A 2 – Technical Scorecards for allocation of points for technical evaluation.

Bid Evaluation Process Gate 2: Price & BBBEE Evaluation

The following preference point system will be used for the evaluation of Price and BBBEE:

PPPFA Regulation 6 - 90/10 (Bid value > R 1 million VAT inclusive)

Price Evaluation (90 points)

Adjudication Criteria	Points
Price Evaluation $P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	90

Where:

P_s = Points scored for price of Bid under consideration
 P_t = Rand value of Bid under consideration
 P_{\min} = Rand value of lowest acceptable Bid

BBBEE Evaluation (10 points)

Adjudication Criteria	Points
BBBEE Evaluation (BBBEE Certificate and/or submission of SBD 6.1)	10

Pricing considerations

Pricing considerations - Annexure B1 – Category A

- Bidder's pricing model must be based on a flat monthly management fee which is all cost inclusive.
- Paragraph 9.2.1.1 should not be included as part of the flat monthly management fee. The services will be rendered and billed on an as and when required basis.
- Paragraphs 9.2.1.8 and 9.2.1.9 should not be included as part of the flat monthly management fee. The services will be rendered and billed on an as and when required basis.
- SARS has approximately 14000 employees.
- The utilisation of the Employee Assistance Programme services over the past three years has been between fifteen and twenty-five percent of the total SARS population.

Pricing considerations - Annexure B2 – Category B

- The services for Executive Wellness Programme will be on an as and when required basis.
- SARS currently has one hundred and seventeen (117) employees who are classified as beneficiaries of the Executive Wellness Programme, however this is subject to change. SARS does NOT guarantee any volumes.

B-BBEE Evaluation

B-BBEE points may be allocated to Bidders on submission of documentation or evidence as follows:

ADJUDICATION CRITERIA	POINTS
A duly completed Preference Point Claim Form: SBD 6.1 and a B-BBEE Certificate.	10

Bidders **MUST** complete and sign the SBD 6.1 form to claim the Bidder's B-BBEE preference points, failing which, the Bidder will be scored zero.

B-BBEE Key Sections to complete in SBD

BID DECLARATION

6.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

7. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1

7.1 B-BBEE Status Level of Contribution: =(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).

8 SUB-CONTRACTING

8.1 Will any portion of the contract be sub-contracted? YES / NO (delete which is not applicable)

8.1.1 If yes, indicate:

- (i) what percentage of the contract will be subcontracted?%
- (ii) the name of the sub-contractor?
- (iii) the B-BBEE status level of the sub-contractor?
- (iv) whether the sub-contractor is an EME? YES / NO (delete which is not applicable)

B-BBEE Certificate

The table below indicates the specific B-BBEE certification documents that must be submitted for this tender. Failure to submit the required certification documents will also result in Bidders scoring zero for B-BBEE.

Classification	Turnover	Submission Requirement
Exempted Micro Enterprise (EME)	Below R5 million p.a. - (Old Codes) Below R10 million p.a. - (Amended Codes)	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA or a letter from an Accounting Officer as contemplated in the CCA. A sworn Affidavit or Certificate from CIPC
Qualifying Small Enterprise (QSE)	Between R5 million and R35 million p.a. (Old Codes) Between R10 million and R50 million p.a. (Amended Codes)	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA. A sworn Affidavit or Certificate from CIPC
Large Enterprise (LE)	Above R35 million p.a. (Old Codes) Above R50 million p.a. (Amended Codes)	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA.

SARS will accept B-BBEE Certificate issued on the revised B-BBEE Codes.

Use and acceptance of affidavits

It has been advised that the Verification Professional will need to test the affidavits submitted as part of a company's procurement rating. All companies will need to request the information which proves Black Ownership and Turnover in addition to the Affidavit, or request that their EME/QSE suppliers be verified and have this confirmed on the Affidavit.

SARS reserves the right to request that bidders submit their Black ownership and turnover information in support of their Affidavits.

B-BBEE Evaluation

Joint Ventures and Consortiums

- Incorporated JVs must submit the B-BBEE status of the entity. Unincorporated JVs must submit a consolidated B-BBEE certificate as if they were a group structure for every separate Bid.

Sub-contracting

- Bidders who want to claim preference points will have to comply fully with regulations 11(8) and 11(9) of the Preferential Procurement Regulations, 2011 with regard to sub-contracting:

Regulation 11(8)

- A person must 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.

B-BBEE Evaluation

Regulation 11(9)

- A person 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.

Proof of Existence: Joint Ventures and/or Sub-Contracting

- Bidders must submit concrete proof of the existence of joint ventures and/or sub-contracting arrangements. SARS will accept signed agreements as acceptable proof of the existence of a joint venture and/or sub-contracting arrangement.
- The joint venture and/or sub-contracting agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or sub-contracting party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or sub-contracting arrangement.

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Bid Submission

Bidders must submit copies of each file (Original and Duplicate) and a CD-ROM or USB flashdrive with content of each file by the **07 November 2016 at 11:00**



TENDER BOX

SARS Brooklyn Bridge, 570 Fehrsen Street, Linton House, Brooklyn

Any enquiries must be referred, in writing via email to:
rft-professionalservices@sars.gov.za or tenderoffice@sars.gov.za

File 1 A and File 1 B : Original/ Duplicate

Pre-qualification documents (SBD documents)

Exhibit 1

- Tax Clearance Certificate – SBD 2
- SARS Oath of Secrecy
- Invitation to Bid – SBD 1
- Declaration of Interest – SBD 4
- Preference Point Claim Form – SBD 6.1
- Declaration of Bidders Past SCM Practices – SBD 8
- Certificate of Independent Bid Determination – SBD 9
- Central Registration Report (Central Database System) from National Treasury



Exhibit 2

- Response to Technical Requirements
- Supporting documents for technical responses
- References/ testimonials



Exhibit 3

- Company profile
- Supplementary information



Exhibit 4

- General Conditions of Contract
- Draft Services Agreement



File 2 A & File 2 B :Original/ Duplicate

Exhibit 5

- BBBEE Certificate



Exhibit 6

- Pricing Schedule (Annexure B)



NB !

Each file and CD-ROM or USB flashdrive must be marked correctly and sealed separately for easy reference during the evaluation process.

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