



RFP 14/2020: Provision of Employee Health and Wellness Related Service For SARS



Briefing Session: 12 March 2021 at 11H00
RFP No.: RFP 14/2020
Closing Date: 25 March 2021, 11h00



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2. RFP Timelines
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Bid Evaluation Committee

Procurement

Sourcing Lead: Professional Services – Project Oversight

Governance, Compliance & Risk Specialist – Audit

Contract Specialist

Tender Office – Bid Opening

Value Delivery Planning – Price Evaluator

Financial Analysis team

B-BBEE Evaluator

SARS Business Unit

Bid Specification Committee

Technical Evaluators X 3

Corporate Legal Services

Legal Specialist

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RFP Timelines

ACTIVITY	DUE DATE
RFP Advertisement in SARS website& e-Tender	05 March 2021
Non-compulsory (virtual) briefing session	12 March 2021
Questions relating to RFP	18 March 2021
RFP Closing Date	25 March 2021
Notice to bidders	May 2021

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Background and 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 9.4 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
- Capacity Building
- Conditions of services
- Access to services
- Customer services
- National Footprint
- Account Management
- Marketing and awareness
- Monitoring and Evaluation

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

Refer to section 12 of the RFP doc

Gate 0

Pre-Qualification

- Invitation to Bid SBD 1
- Tax Compliance status pin
- Central Registration Report (Central Database System) from NT
- GCC & Draft Services Agreement
- SARS Oath / Affirmation of Secrecy
- Declaration of interest SBD 4
- Preference Point Claim form- SBD 6.1
- Declaration of Bidder's Past SCM Practices – SBD 8
- Certificate of Independent Bid Determination – SBD 9
- Supplier cost and risk assessment questionnaire
- Financial Statements for the three most recent financial periods
- Bidder Compliance checklist for Technical Evaluation

Gate 1

Mandatory Requirements

Minimum B-BBEE Status level 3

Bid Evaluation Process cont...

Gate 2

Desktop Evaluation

Presentation Evaluation

100
points

Achieve overall
score of 70 out of
100 points to
proceed to Gate 3

Refer to:

- Annexure A1 & A2: Technical Evaluation Criteria
- Annexure A3 _Technical Compliance Checklist
- Annexure A4 & A5: Customer Satisfaction Survey
- Annexure B1 & B2 : Pricing Schedule
- Annexure C1: Regional Split and Languages
- Annexure C1: Regional Splits and Language
- Annexure C2: Major Towns
- Annexure D1: Facilities
- Annexure D2: National Footprint

Gate 3

B-BBEE = 20

Price = 80

- B-BBEE Certificate/ Sworn Affidavit
- SBD 6.1
- Annexure B1 and B2 – Pricing Schedule

Technical Requirements

Bidders are required to complete Annexure A3 to assist the evaluators to locate technical responses.

Section No.	Technical requirements	Compliant	Partially Compliant	Non-Compliant	Reference in proposal	Comments
9.4.1	The service provider has information on: A company profile, organisational structure and detailed infrastructure to render the services as outlined in 9.2;	Yes			Page 9 – 12 Exhibit 2	
9.4.2	Indicate a range of in-house services provided specific to employee health and wellness services; 3	EXAMPLE			Page 13 – 15 Exhibit 2	Bidder to state reason for partial compliance
9.4.3	Full contact details of the Client Relationship Manager.			No	Page 17 – 20 Exhibit 2	Bidder to state reason for non compliance

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Bid Evaluation Process Gate 3 – Price

The Price and B-BBEE points will be added together to determine each bidder’s overall score out of 100 points.

Stage 1: Price Evaluation (80 points)

Bidders must refer to Annexure B1 and B2 – Pricing Schedule

Adjudication Criteria	Points
Price Evaluation	80

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

- Ps

=

Points scored for price of Bid under consideration
- Pt.

=

Rand value of Bid under consideration
- Pmin

=

Rand value of lowest acceptable Bid

Bid Evaluation Process Gate 2 – B-BBEE

Stage 2: B-BBEE Evaluation (20 points)

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: Standard Bidding Document (SBD 6.1) and a B-BBEE certificate.	20

Bidders, who do not complete SBD 6.1 in its entirety, will not be awarded points for B-BBEE.

B-BBEE Certificate/Sworn Affidavit

The table below indicates the B-BBEE documents that must be submitted for this bid. Failure to submit the required documents will result in bidder(s) scoring zero (0) for B-BBEE.

No.	Classification	Turnover	Submission Requirement
1.	Exempted Micro Enterprise (EME)	Below R10 million p.a.	Sworn affidavit or a certificate from the Companies and Intellectual Property Commission (“CIPC”) or a certified copy of a B-BBEE Rating Certificate from a SANAS accredited rating agency.
2.	Qualifying Small Enterprise (QSE)	Between R10 million and R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a DTI Affidavit – only 51% Black Owned (BO) and above.
3.	Large Enterprise (LE)	Above R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency.

SARS reserves the right to request that bidders submit proof of their black ownership and turnover information, in support of their sworn affidavits.

B-BBEE key Sections to complete in SBD6.1

5. BID DECLARATION

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

6. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 5.1

6.1 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 4.1 and must be substantiated by relevant proof of B-BBEE status level contributor.

7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

7.1.1 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 or QSE

(Tick applicable box)

Sub-Contracting

Bidders who want to claim preference points will have to comply fully with regulations 12(1) and (3) of the Preferential Procurement Regulations, 2017 with regard to subcontracting:

Regulation 12 – Subcontracting after award of tender

- (1) A person awarded a contract may only enter into a subcontracting arrangement with the approval of the organ of state.
- (2) A person awarded a contract in relation to a designated sector, may not subcontract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- (3) 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

Joint Ventures and Consortiums

- Unincorporated consortium or joint venture will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their consolidated B-BBEE status level Verification Certificate scorecard and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Proof of Existence: Joint Ventures and/or Consortiums

- Bidders must submit concrete proof of the existence of joint ventures and/or Consortiums. SARS will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortiums.
- The joint venture and/or consortiums must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortiums . 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 consortiums.

B-BBEE Points

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	5
5	4
6	3
7	2
8	1
Non-compliant contributor	0

Financial Evaluation

Bidders are required to submit complete sets of audited or reviewed annual financial statements for the three (3) most recent financial periods in the name of the bidding entity.

The financial statement analysis will be conducted on the bidders that proceeded to Gate 3.

The annual financial statements must contain:

- Statement of Profit and Loss and Other Comprehensive Income;
- Statement of Financial Position;
- Statement of Cash Flows; and
- Accompanying Notes.

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Services Agreement

Bidders are requested to:

- ☐ Comment on the terms and conditions set out in the Services Agreement and where necessary, make proposals to the terms and conditions;
- ☐ Each comment and/or amendment must be explained; and
- ☐ All changes and/or amendments to the Services Agreement must be in an easily identifiable colour font and tracked for ease of reference.
- ☐ SARS reserves the right to accept or reject any or all amendments or additions proposed by the successful bidder if such amendments or additions are unacceptable to SARS or pose a risk to the organisation.

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Bid Submission

Bidders must submit copies of each file (Original and Duplicate) and a USB with content of each file by the **25 March 2021 at 11:00am**. (Refer to section 10 of the main RFP document)



TENDER BOX

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

Any enquiries must be referred, in writing via email:

tenderoffice@sars.gov.za cc and rft-professionalservices@sars.gov.za

File 1: Original/ Duplicate

Exhibit 1

- Pre-qualification documents (SBD documents)



Exhibit 2

- Bidder Compliance Checklist – **Annexure A3**
- Response to Technical Requirements – **Annexure A1 & A2**
- Supporting documents to paragraph 9.4 of the RFP document



Exhibit 3

- General Conditions of Contract
- Draft Services Agreement



File 2: Original/ Duplicate

Exhibit 1

- B-BBEE Certificate
- SBD 6.1
- Financial Statements (3 years audited annual statements)



Exhibit 2

- Pricing Schedule



NB! Each file must be marked correctly and sealed separately for easy reference during the evaluation process. CD-ROM / USB marked with Bidder Name

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Thank you
Re a leboha
Re a leboga
Ndza Khensa
Dankie
Ndi a livhuwa
Ngiyabonga
Enkosi
Ngiyathokoza

