

THE NATIONAL CREDIT REGULATOR

JULY 2019

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE EMPLOYEE WELLNESS PROGRAMME SERVICES FOR A PERIOD OF THREE YEARS

RFP NUMBER: NCR 610.07.2019

DUE DATE: 14 AUGUST 2019 AT 11H00

Hand delivery to NCR offices

SECTION 1

GENERAL TERMS OF CONDITIONS

1. General Information for Bidders

The National Credit Regulator (NCR) was established in terms of Section 12 (1) of the National Credit Act (Act 34 of 2005) and came into being on 1 June 2006.

The NCR will determine which bidding organisation (“bid participant”), if any, is appointed in response to this request for submission as **stipulated in section 2 of this document.**

1.1. General Terms

This tender is issued in terms of the Public Finance Management Act 1 of 1999 (PFMA), the Preferential Procurement Policy Framework Act 5 of 2000 (PPPFA), the Preferential Procurement Regulations, 2017 (PPR), Supply Chain Management Regulations issued by the National Treasury and BBBEE Act.

Parties that wish to submit proposals are required to indicate that they are willing to accept the General Conditions and Procedures of the NCR (see Section 4 below and Annexure B.1). Please read this document carefully prior to submitting your proposal.

1.2. The Proposal Format

1.2.1. Economy of proposal preparation

The proposal should be prepared simply and economically, providing a straightforward and concise description of the bid participant’s ability to meet the requirements of the proposal request.

Clear factual responses are required. The content of the proposals shall determine the merit of each participant, not brochures or other marketing material. To facilitate the review of proposals, participants are required to organise their responses according to the format presented below. Should a participant wish to provide additional information, that information should be referred to, and provided for, in a file of Annexures.

1.2.2. Validity of proposals

The proposals must include a statement as to the period for which the proposal remains valid. The proposal must be valid for at least ninety (60) days from the due date for the submission of all bids. Refer to the quarters in the terms of reference (TOR).

1.2.3. Number of proposals

Each bid participant must provide **three (3)** hard copies and **1 CD/stick** of their entire proposal, including all the documentation referred to in 4 below, in the format specified in that section. All submitted proposals will become the property of the NCR, and will not be returned. Receipt of all proposals will be recorded in a register at the point of receipt. One copy of the proposal must be signed and dated in black ink by the bidder or authorized representative of the bidder and initialled on each page.

2. Submission of proposals

2.1. Proposals must reach the offices of the NCR before 11:00 on **14 AUGUST 2019**, and must be enclosed in a sealed envelope which must be clearly labelled/addressed on the outside:

(a) RFP No: NCR 610.07.2019

(b) TERMS OF REFERENCE: WELLNESS PROGRAMME SERVICES

(c) CLOSING DATE: 14 AUGUST 2019 AT 11H00 SHARP

2.2. Proposals are to be submitted in the marked tender box, in the reception area, National Credit Regulator, 127-15th Road, Randjiespark, Halfway House, Midrand. The tender box will **only** be available for the depositing of proposals between 08h00 and 16h30 on weekdays (excluding public holidays).

2.3. Please note that this RFP closes punctually at 11h00 on **14 AUGUST 2019**. No late submissions will be considered under any circumstances.

2.4. **All** the documentation referred to in Section 4 below must be submitted. Failure to submit all the documentation referred to in this section may result in a submission being discarded, and not considered for evaluation.

2.5. If responses are not delivered as stipulated in this Section 2.1, such responses will be considered **“late”**, and will not be considered for evaluation.

- 2.6.** The NCR shall not disclose any details pertaining to the responses received, to any other participant, as this is regarded as confidential information.
- 2.7.** Envelopes must not contain documents relating to any RFP other than the one referred to in this RFP.
- 2.8.** The responses to the RFP will be opened as soon as is practical after the expiry of the time advertised for receiving them.
- 2.9.** Only the participants that are short-listed after the evaluation process will be informed of the results of the submission adjudication process.
- 2.10.** After the evaluation process is completed, the Evaluation Committee may, prior to making a final selection, draw up a shortlist of participants and require them to make a detailed presentation to the Adjudication Committee. A minimum of 2 days' notice will be given to relevant participants in advance of the presentation date.

3. Timetable

Date	Activity
23.07.2019	Issue tender document
14 08.2019	Closing date at 11h00
16.08.2019	Evaluations – functionality criteria
21.08.2019	Consolidation of scores
23.08.2019	Presentations by the shortlisted bidders
29.08.2019	Adjudication committee
30.08.2019	Appointment of a supplier

The National Credit Regulator reserves the right to determine the structure of the process, the right to determine the number of short-listed participants, the right to withdraw from the proposal process, and the right to change this timetable at any time without notice.

4. Documentation to be submitted

Please Note

All of the documentation described below must be submitted, with no omissions whatsoever. Where a particular form or format of documentation is stipulated, this is the **only** form or format in which these documents must be submitted. Failure to adhere to these requirements may result in the rejection of the entire submission.

All of the documentation referred to below (in Parts One – Eleven) must be submitted. For ease of reference and to facilitate the evaluation process, you are requested to clearly mark each part of the submitted documentation as it is referred to below.

Part One – Proposal drafted in response to Terms of Reference

Section 2 of this document below, contains the terms of reference (TOR) for the above mentioned tender. Bid participants are required to draft a proposal that will clearly indicate to the Evaluation Committee how they will fulfil the requirements as set out in the TOR.

Bid participants should include the following information when drafting their proposals:

- Proposals should make clear the relevant skills, experience and capacity of the participant, in respect of this particular TOR. This is an important evaluation criterion. Bid participants should ensure that their proposals focus on how they will address the requirements of this TOR, rather than on achievements.
- Proposals must contain the details of the proposed approach to be adopted in order to deliver the service in accordance with the TOR.
- Proposals should clearly indicate whether or not bid participants have the internal capacity to meet the requirements of the TOR.

Part Two – Pricing Proposal- SEPERATE ENVELOPE

SBD 3.3 Pricing Schedule together with signed off detailed pricing on the company's letter head with total estimated amounts showing hourly rate, travel, all disbursements. They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected. Additional information may be added on a separate page if necessary.

The total price that the participant will charge to deliver services in accordance with the TOR must be clearly indicated. The pricing proposal should contain sufficient information to allow the Evaluation Committee to estimate the cost of the service, to a high degree of accuracy.

Please note that a financial proposal must be submitted in a **separate sealed envelope** together with your submission. The financial Proposal will be opened once all technical proposals have been evaluated. This appointment will be made in line with QBS.

All prices provided must be inclusive of Value-Added Tax (VAT).

Please note that the prices contained in the pricing proposal are the only charges that may be levied if the participant's proposal is successful, unless explicitly agreed to in writing by the National Credit Regulator, and in terms of the General Conditions of Contract, no additional cost will be accepted after the bidding documents have been submitted and the tender closing date has expired. Any cost for additional parts and peripherals needed for the successful implementation of the project shall remain and form part of the bidding price.

Part Three – General Conditions and Procedures of the NCR

Annexure B and B1 - General Conditions and Procedures of the NCR. Bid participants must indicate clearly that they have read this document, and have no objections to being bound by its contents. In cases where any provisions of the General Conditions and Procedures conflict with this General Information for Bidders and/or Terms of Reference, the latter will take precedence over the General Conditions of Contract.

Part Four – Contract Form: Rendering of Services

Annexure C SBD 7.2 - Contract Form: Rendering of Services. This will only be completed by the successful bidder once a selection has been made by NCR. Participants do not, therefore, need to complete this form at the bidding stage but their proposals must clearly indicate that they have read this form, and have no objections to signing it as is, if selected as the successful participant.

Part Five – Tax Clearance Certificate

Annexure D - Please complete form SBD 2. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink. Failure to submit a valid, original tax clearance certificate issued by SARS will result in a proposal being rejected.

A CSD print out must also be attached.

Part Six – Preference Points Claim Form

Annexure E – form SBD 6.1. Bid participants must complete Sections 8 and 9 in full. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected. **## Please note that a BBEE certificate must also be attached to the bid documents. None submission will result in zero scoring in this competitive bidding process**

Part Seven – Declaration of Interest

Annexure F – form SBD 4. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected.

Part Eight – Declaration of past Supply Chain Management Practices

Annexure G – form SBD 8. **DO NOT RETYPE THESE FORMS.** They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected.

Part Nine – Non-Disclosure Agreement

Annexure H – Non-Disclosure Agreement. Participants must indicate clearly that they have read this agreement, and have no objections to signing it, as is.

Part Ten – Certificate of Independent Bid Determination

Annexure I – Certificate of Independent Bid Determination Participants. They must be completed on the original and signed, all in black ink. Forms with photocopies and/or other reproductions of signatures may be rejected.

Part Eleven – SLA draft version for supplier review

Annexure K – SLA draft version for supplier review. The participants must indicate clearly that they have read this agreement, and have no objections to signing it, as is. If not objections should be outlined separately in a letter.

5. Evaluation Criteria

Proposals will be evaluated on the 80/20 preference points scoring system: that is, 80% of the points awarded will be based on price, as indicated in the table below; and 20% of the points awarded will be based on B-BBEE codes system, allocated as indicated in the table below:

B-BBEE status level of contributor	Number of points	Price
Total maximum points	20	80

Functionality will be evaluated in terms of Section 2 point 3

6. Conflict of interest

Service providers are required to provide services that are professional, objective and impartial. Service providers must ensure that there is no conflict of interest between existing assignments, obligations and responsibilities to other clients and the services set out in the TOR. In the event of any uncertainty in this regard, full disclosure in the submitted proposal should be considered. Non-disclosure of a conflict of interest may be grounds for termination of any contract.

7. Confidentiality agreement

The successful service provider may have access to confidential data or information. The appointment of a successful bidder is subject to that bidder agreeing to the contents of, and signing, the NCR’s standard Non-Disclosure Agreement.

8. Contact details

This no-contact policy does not apply to any information deemed to be in the public domain, or which is readily available from organs of State, which are repositories of such information. All communications and enquiries/requests for clarification relating to this proposal should be directed to procurement@ncr.org.za

SECTION 2

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE EMPLOYEE WELLNESS PROGRAMME SERVICES FOR A PERIOD OF THREE YEARS

1. BACKGROUND

The National Credit Regulator (NCR) was established in terms of the National Credit Act, No. 34 of 2005 and came into being on 1 June 2006. We have only one office situated in 127th, 15th Road, Randjespark, Midrand. All the required services on this terms of reference will be required in this office.

NCR's Human Resources Department requires the services of qualified and suitable Professional Service Providers (PSP's) to provide the wellness programme. The required services will be for a period of 3 years (2019 / 2020, 2020/2021 and 2021 / 2022 financial years). The NCR has got a complement of 159 employees with 13 different departments.

2. OVERALL OBJECTIVES

- 2.1. To increase productivity, heighten morale and teamwork; and strengthen the bonds between management, employees and the organization by providing a sustainable and confidential employee wellness service to all NCR employees.
- 2.2. To establish and maintain a holistic approach to support employees in managing their personal and social problems.
- 2.3. To provide employees and their immediate family members with a comprehensive resource to help them address personal problems within their diverse needs.
- 2.4. To provide management with a practical resource to aid in the supporting employees with personal and work-related problems when they impact on an employee's performance.
- 2.5. To establish and maintain a system through which employees at risk can be identified, motivated and referred for assistance.
- 2.6. To develop and improve the life skills and promote self-empowerment.
- 2.7. To promote and encourage employee healthy lifestyles.
- 2.8. To promote work-life balance and maintain a healthy workforce within a supportive environment

3. SCOPE OF SERVICES :

The scope of services is a comprehensive Employee Wellness Programme consisting of the following core elements:

- 3.1. EWP Services** which include counselling services and trauma debriefing to employee's and families in common household.
- 3.2. HIV/AIDS Management Program** in partnership with the employee's medical aid provider which includes prevention interventions treatment care and support;
- 3.3. Health and Productivity Management** which includes chronic disease management, injury on duty, incapacity, health promotion, awareness and education; and
- 3.4. Wellness Management** includes but is not limited to work life balance interventions such as stress management, retirement planning, financial fitness amongst others.
- 3.5. Executive Wellness Program**, includes the training of Executive Management on wellness, Life and career management coaching, as well as Mediation on conflict management. Design an Executive Wellness framework.

4. EXPECTED DELIVERABLES:

4.1. Implementation of an Employee Wellness Program (EWP) that focuses on the following :

- Psychological support services in relation to employee's mental, social, physical and spiritual wellbeing, including the provision of counselling services for the employee and their next of kin.
- Personal support for traumatized employees as and when required in cases of personal incidents and accidents related to self or their next of kin.

4.2. Development and Implementation of a Health and Productivity Management Programme:

- Life threatening disease awareness and management including but not limited to HIV/AIDS, Diabetes, TB, Hypertension and other related chronic diseases.

4.3. Provisioning of annual health screening assessment services for the duration of the contract which include:

- Flu Vaccination
- Voluntary counselling and Testing (VCT)
 - Personal Health assessments (PHA) and Personal Stress assessment (PSA) Hypertension (BP monitoring)
- Blood sugar level testing

4.4. Development and Implementation of Work Life Balance Program inclusive of:

4.4.1. Life skills program that includes:

- Financial fitness
- Retirement planning
- Stress management.
- Conflict Management
- Independent Psychological assessment.

4.4.2. Management Training

- Training of managers on EWP case referral and management
- Management support services through management systems on Absenteeism and leave management.

4.4.3. Executive Wellness Program

- Training of Executive Management on Wellness.
- Life and career management coaching.
- Mediation on Conflict Management.
- **Design an Executive Management Framework** - This will include an Integrated Management Programme with specific focus to Management (This

should consist of a toolkit that will have a coaching guide/ manual and a debriefing guide for Managers when they get approached by their Employees).

5. REPORTING

- Monthly reports on all programmes conducted.
- Statistical analysis, interpretation and recommendation for action
- Quarterly report on all programmes conducted.
- Annual report on all programmes conducted.

6. SPECIFIC REQUIREMENTS

Proposals must state how the following will be managed:

- Language
- Face to face consultation with clients in the urban and remote areas
- Confidentiality

7. THE FUNCTIONALITY EVALUATION CRITERIA

1. <u>COMPANY PROFILE AND EXPERTISE</u>	WEIGHT
<ul style="list-style-type: none"> ▪ The Bidder must be relevant to the service need and requirement of the NCR related to wellness. The bidder must indicate their expertise on the following: <ul style="list-style-type: none"> • Psychosocial services. • Counselling Services. • Customised Therapy related to the service required. ▪ Bidders must provide their Company Profile. ▪ The Bidder’s employees or Specialist must possess the following competencies and Qualifications. <ul style="list-style-type: none"> ▪ Competencies : <ul style="list-style-type: none"> ○ Proven Assessment of the following competencies for the proposed team of the service provider. <ul style="list-style-type: none"> • Emotional Intelligence. • Patience. • Complexity Management. ▪ Qualifications and Accreditations: <ul style="list-style-type: none"> ○ Bidders’ proposed team must have at least the following qualifications, short CV ‘s of the team must be provided as evidence: 	30

<ul style="list-style-type: none"> • Psychological Degree/ Relevant Degree. • Registered Psychologist. • Registered Counsellor. <p>▪ Industry Affiliation:</p> <ul style="list-style-type: none"> ○ Bidders must provide the proof of the relevant industry affiliation/ accreditation. 	
2. <u>APPROACH AND METHODOLOGY</u>	
<p>Bidders are required to provide the following indicating their approach to deliver NCR's requirements:</p> <ul style="list-style-type: none"> ▪ High level project plan for the next three years – with Milestones in respect of the NCR's requirements and scope of work (as in point 4 – expected deliverables). <ul style="list-style-type: none"> ▪ Annual plans indicating how each requirement/monthly talks will be undertaken and facilitated (i.e. topics like living with Diabetes, cancer and Substance Abuse). Proposals should also outline how NCR's operations will be affected and recommendation to avoid interruptions. Provide a wellness calendar with the implementation plan thereof. ▪ Training Plan: bidders must indicate how the required training will be undertaken without disturbing the organisation's operations. ▪ Consultation process Management <ul style="list-style-type: none"> ○ Bidders must indicate how each of the following areas will be addressed and managed. <ul style="list-style-type: none"> ▪ Language Issues, Face to Face and Confidentiality. 	30
3. <u>REPORTING</u>	
<ul style="list-style-type: none"> • Reporting Format. <ul style="list-style-type: none"> ○ Bidders must provide a sample of their reporting format. ○ NCR requires a monthly and quarterly reporting with trends analysis. 	10
4. <u>TURNAROUND TIMES</u>	
<ul style="list-style-type: none"> • Bidders must indicate in their proposal how the set and required turnaround times will be met. <ul style="list-style-type: none"> ▪ 24 Hours for a normal referral. 	

<ul style="list-style-type: none"> ▪ 4 Hours for Trauma referral. ▪ 5 Days for Projects. 	20
5. REFERENCES	
<ul style="list-style-type: none"> ▪ The bidder must provide the reference letters indicating the contact name, telephone number and e-mail address. ▪ Contact details of 3 references from amongst recent clients with whom similar work has been conducted in the past 12 Months. 	10

Bidders are required to score a minimum of 70% points on functionality to qualify to be evaluated in the next level (BBBEE and price). Bidders who do not score the minimum of 70% points on functionality will be disqualified and not be evaluated on price and BBBEE.

8. Additional information:

- Brief company profile, as relevant to the above mentioned terms of reference.
- Experience in the relevant areas and Clientele.
- A proposal should include the methodology to deliver and meet the deadline for delivery
- Confirmation that the proposed team members will in fact be available to undertake this exercise at the appropriate time and meet the necessary deadlines.
- The proposal should contain a work plan, showing tasks, timelines etc.
- Contact details of at least three references from amongst recent clients with whom similar work has been conducted in the past 24 Months.
- Certificate of incorporation / legal status.
 - Company registration documents; Certified copy of director's identity documents
 - Certified BBBEE certificate/ sworn affidavit
- Financial proposal.
 - Detailed pricing on the company letter head,
 - The total cost must link to SBD 3.3 attached.

NB: Bidders must also submit a proof of registration on the central database system. (National Treasury system).