



SALGA
South African Local Government Association

TERMS OF REFERENCE

RFP NO.: SALGA/32/2016

SOUTH AFRICAN LOCAL GOVERNMENT ASSOCIATION (SALGA) HEREBY REQUEST FOR PROPOSALS FOR THE PROGRAMME DESIGN: EMPLOYEE WELLNESS PROGRAMME (EWP)

CLOSING DATE: 13 MAY 2016 AT 11:00

TENDERS CAN BE DEPOSITED IN THE TENDER BOX AT THE RECEPTION AT:

SALGA NATIONAL OFFICE

FIRST FLOOR, BLOCK B

MENLYN CORPORATE PARK

C/O GARSFONTEIN AND COROBAY AVENUE

WATERKLOOF GLEN

TEL: 012-369 8000

Eastern Cape
First Floor,
3 Berea Terrace Berea
East London; 5214
Tel: (043) 727-1150
Fax: (043) 727-1156

Free State
Corner Nelson Mandela
Drive & Burger Street
Bloemfontein; 9300
Tel: (051) 447-1960
Fax: (051) 430-8250

Gauteng
3rd Floor Braampark
Forum 2, 33 Hoofd Street
Braamfontein; 2017
Tel: (011) 276-1150
Fax: (011) 403-3636

Kwa-Zulu Natal
3rd Floor,
202 Transnet Building
Smith Street
Durban; 4000
Tel: (031) 361-1236
Fax: (031) 361-1234

Limpopo
127 Marshall Street
Polokwane; 0700
Tel: (015) 291-1400
Fax: (015) 291-1414

Mpumalanga
SALGA House
11 Van Rensburg Street
Nelspruit, 1200
Tel: (013) 752-1200
Fax: (013) 752-5595

North West
Jade Square, Suite 400
Cnr OR Thambo &
Margaretha Prinsloo
Street
Klerksdorp; 2570
Tel: (018) 462-5290
Fax: (018) 462-4662

Northern Cape
Crescent House
1 & 2 D'Arcy Street
Kimberly; 8300
Tel: (053) 833-2505
Fax: (053) 833-3828

Western Cape
7th Floor,
Eleven Adderley Street
Cape Town, 8000
Tel: (021) 469-9800
Fax: (021) 461-1936

1. INTRODUCTION

SALGA is a unique independent association of municipalities in South Africa recognized in terms of Section 163 of the Constitution of the Republic of South Africa as a Schedule 3A public entity. Our vision is to be an association of municipalities that is at the cutting edge of quality and sustainable services.

2. PURPOSE

To provide Employee Wellness Programme (EWP) through counseling and support to all employees of SALGA and their immediate family members who experience social, psychological and psychiatric problems either at work or at home.

To assess employee needs and risks which will need to be effectively managed through the EWP.

Identify trends and design relevant intervention strategies that are aligned with SALGA strategies.

3. BACKGROUND

SALGA recognizes that if it is to realize its vision, it must nurture and constantly develop its winning formulae- a combination of service excellence, quality, participative management and empowerment. The organization also realizes that this will only be achieved if it continues to value and care for its employees, and takes the management of employee issues and risks in the organization seriously. To this end, SALGA seeks to provide a comprehensive and holistic Employee Wellness Programme across the organization.

SALGA views an Employee Wellbeing Programme as a strategic intervention designed to produce individual and organizational benefits by identifying and proactively managing employee's personal, health, and work related concerns and challenges.

As part of SALGA's ongoing initiative to support its employees in maintaining a healthy work life balance, a need has been identified to update and source a provider to assist SALGA for a period of **3 years**. SALGA therefore acknowledges that the well-being of employee is not only an individual matter but has great bearing on the entire organization and the community it serves. **SALGA staff complement is 480; however the numbers may vary due to capacitating the organization or natural attrition.**

4. SCOPE OF WORK

4.1 The scope of service shall cover the following:

- Employee Wellness Programmes
 - ❖ Stakeholder assessment
 - ❖ Programme design and strategy
 - ❖ Project set-up and planning
 - ❖ Needs analysis and risk identification
 - ❖ Online services
 - ❖ Social/Psychological/Psychiatric Counseling Services
 - ❖ Awareness and education programmes to promote healthy lifestyle choices and coping skills as per the organizational wellness calendar (national/provinces)
 - ❖ HIV and AIDS Counseling services
 - ❖ Incapacity and absenteeism management

- ❖ Frequent awareness and visibility programmes
- ❖ Provision of **Independent** medical assessments and opinion as and when required
- ❖ Periodic reporting and In-depth analysis inclusive of recommendations
- ❖ Critical Incident and Trauma Management (including debriefing services)
- ❖ Supervisory training
- ❖ Financial and legal Advise
- ❖ Executive Management wellness services

4.2 The EWP service provider shall render a 24 hour telephonic service (during and after hours 24/7/365) and provide face to face counselling to SALGA employees as and when required.

All the above will be done in collaboration with HR Wellness of the organization. If any additional services are rendered, service providers must outline such separately.

5. PROJECT OUTPUT/OUTCOMES

Service providers are required to produce the following deliverables:

- 5.1 A detailed project plan for the implementation of this project. The project plan should provide a clear overview of timelines, milestones, roles and responsibilities. This document should present a detailed business case for the EWP and include a detailed plan for the implementation of the programme within the **next 3 years**. Emphasis will be placed on presenting a sound argument for the implementation of the programme.
- 5.2 A detailed integrated organizational report on the stakeholder analysis and the assessment of needs and risks including feedback and recommendations to stakeholders. This report is to integrate the results from all assessments conducted and should benchmark findings against South African data and provide projected costings of behavioural risks where possible. The report should draw on a multitude of information sources and evidence the suitability of the research method in reaching SALGA employees.
- 5.3 A strategy document on EWP. This document should be firmly based on the assessments mentioned above and should be grounded on international and local best practice. Key strategic objectives and challenges should be highlighted.
- 5.4 Counseling services must be available in the language of choice and preferred gender
- 5.5 The EWP service provider must be available to render services at SALGA National and Provincial offices mentioned below:
 - 5.5.1 SALGA National Office
 - 5.5.2 SALGA: Gauteng
 - 5.5.3 SALGA: Limpopo
 - 5.5.4 SALGA: Mpumalanga
 - 5.5.5 SALGA: North West
 - 5.5.6 SALGA: Northern Cape
 - 5.5.7 SALGA: Free State
 - 5.5.8 SALGA: Eastern Cape
 - 5.5.9 SALGA: Western Cape
 - 5.5.10 SALGA: KwaZulu – Natal

6. REPORTING REQUIREMENTS

The service provider shall provide quarterly and annual reports to management. The reports should be comprehensive and accurate with interpretation of trends, problem profiles and possible interventions.

7. LEGISLATIVE REQUIREMENTS

As SALGA is a Schedule 3A Public Entity and needs to operate within all the legislative requirements as contained in the Public Finance Management Act, Treasury Regulations and all other applicable legislation.

8. SUBMISSION

Bid documents must be submitted on or before closing date at SALGA National Offices located at First Floor, Block B Menlyn Corporate Park, 175 Corobay Avenue, Corner Garsfontein Road, Waterkloof Glen X11, Pretoria, 0181.

Please note that late bids will not be accepted

9. ADDITIONAL INFORMATION

Any additional information required can be obtained through a written request to SCM at scm@salga.org.za.

10. CONDITIONS OF BID (FAILURE TO MEET ANY OF THE REQUIREMENTS BELOW WILL RENDER YOUR BID OFFER NON-RESPNSIVE).

- a. The requirement for content of the project proposal section above outlines the information that must be included in bid offers. Failure to provide all or part of the information will result in your bid being excluded from the evaluation process.
- b. SALGA reserves the right to request new or additional information regarding each bidder and any individual or other persons associated with its project proposal and such information must be submitted within reasonable time.
- c. SALGA reserves the right not to make any appointment from the proposals submitted.
- d. Bidders shall not make available or disclose details pertaining to their project proposal with anyone not specifically involved, unless authorized to do so by SALGA.
- e. Bidders shall not issue any press release or other public announcement pertaining to details of their project without the prior written approval of SALGA.
- f. Bidders are required to declare any conflict of interest they may have in the transaction for which the bid is submitted or any potential conflict of interest. SALGA reserves the right not to consider further any bid where such a conflict of interest exists or where such potential conflict of interest may arise.

- g. A valid original Tax Clearance Certificate issued by the South African Revenue Services, must be submitted, failing which the relevant bidder's bid shall not be considered.
- h. Any and all project proposals shall become the property of SALGA and shall not be returned.
- i. The bid offers and proposals should be valid and open for acceptance by SALGA for a period of 90 days from the date of submission.
- j. Bidders are advised that submission of a project proposal gives rise to no contractual obligations on the part of SALGA.
- k. SALGA reserves the right not to accept any bid which does not comply with the specifications and conditions set out in the bid documents.
- l. SALGA reserves the right not to award the bid to the bidder that scores the highest points.
- m. Disputes that may arise between SALGA and a bidder must be settled by means of mutual consultation, mediation (with or without legal representation) or, when unsuccessful, in a South African court of law.
- n. In addition to adherence to the specific terms and conditions of proposals, provided in this document, the bidder shall be bound by the provisions of the General Conditions of Contract attached hereto, an originally signed copy of which must be submitted together with all other bid documentation.
- o. All returnable bid documents must be completed in full and submitted together with the bidder's proposal.
- p. SALGA will not be liable for costs incurred during the site visits or any other cost related to the submission of the bid. SALGA shall pay for its costs relating to its representatives that participate in site visits.

STANDARD BIDDING FORMS

Completion of the Standard Bidding Documents below stated is mandatory, failure to do so will render your bid offer invalid.

Preference Points Claim form

Form SBD 6.1 - Bidders must complete this document in full, special attention must be given to section 8 and 9. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink.

a) Declaration of Interest

Form SBD 4 - Bidders must complete this document in full. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink.

b) Declaration of past Supply Chain Management Practice

Form SBD 8 - Bidders must complete this document in full. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink.

c) Certificate of Independent Bid Determination

Form SBD 9 - Bidders must complete this document in full. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink.

d) Pricing Schedule

Form SBD 3.3. Price must be quoted in South African currency and must be inclusive of VAT. Bidders are further requested to indicate their price in all elements listed on the pricing schedule.

e) **Supplier Registration Form.**

Bidders must complete this document in full. DO NOT RETYPE THESE FORMS. They must be completed on the original and signed, all in black ink.

f) **Invitation to Bid**

SBD1 must be completed in full and signed.

g) An original or certified copy of a valid BBBEE certificate must be submitted together with the bid offer.

11. EVALUATION METHODOLOGY (matrix)

11.1 MANAGEMENT EXPERIENCE

11.1.1 Service providers will be expected to provide their management profiles with references including the case manager assigned to deal with SALGA.

11.2 COMPANY EXPERIENCE

11.2.1 7.2.1. Service providers are required to provide proof/evidence that they have facilitated or performed similar project in the previous ten (10) years accompanied by correspondence from three (3) contactable references. Knowledge about Local government challenges and SALGA requirements will be an advantage.

11.3 ACCREDITATION AND RELEVANT QUALIFICATIONS

11.3.1 Service providers are required to provide CV's of their health professionals, legal and financial advisers with their relevant tertiary qualifications and proof of registration with the relevant accredited bodies.

11.4 COST/PRICING

11.4.1 The service provider will be requested to give a quote regarding the work to be undertaken for this project. The cost must be VAT inclusive and should be quoted according to the South African currency (i.e.Rand).The price shall be per case reported.

11.5 AVAILABILITY OF INFRASTRUCTURE

11.5.1 The successful service provider must provide infrastructure to all employees based in Head Office and Provincial Offices.

11.5.2 SALGA reserves the right to conduct a site visit with the three highest shortlisted service providers.

11.5.3 SALGA reserves the right to call upon the three highest shortlisted service providers to do presentations.

12. EVALUATION OF BIDS

The following evaluation method will be used:

After the closing date of the bid invitation, an appointed evaluation committee of SALGA Officials and possibly other external parties will evaluate the proposals of the bidders.

The Committee will evaluate each of the bid proposals received against the appointed criteria as provided for in the Preferential Procurement Policy Framework Act 2005 (As amended to BBEE)

12.1 Bids will be evaluated on a 90/10 point system as outlined in the PPPFA.

12.2 The received proposals will be evaluated in three phases:

- **Phase 1:** Bidders will be evaluated based on functionality in terms of the evaluation criteria. The minimum threshold is 70. Bidders who fail to meet the minimum threshold will be disqualified and will not be evaluated further for Price and B-BBEE Statues level of contribution.

Evaluation Criteria as stipulated below:

Item Number	Functionality Criteria	Weights
1	MANAGEMENT EXPERIENCE (Service providers are expected to provide their management profiles with references and including the case manager assigned for SALGA)	20
2	ACCREDITATION AND RELEVANT QUALIFICATIONS (Proof of accreditation of psychologist's psychiatrists, social workers, legal advisers, financial advises and registered counselors with the relevant statutory bodies. e.g. HPCSA,SWASWIP,SACSSP,SA Law Society)	15
3	COMPANY EXPIRIENCE (provide at least three (3) contactable) references in similar project or experience)	30
4	PROJECT PLAN (Project planning, understanding of TOR clear methodology)	35
	Total	100

- **Phase 2: Price**

Price will be converted to 90 using the formula prescribed in the 90/10 point system.

- **Phase 3: B-BBEE Status Level of Contribution**

The remaining 10 points will be allocated in terms of Regulation 5(2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Statuses Level of Contributor	Number of Points (90/10 System)
1	10
2	9
3	8
4	5
5	4
6	3
7	2
8	1
Non-Compliant Contributor	0

Phase 2 (Summary of the Final Evaluation Process)

Price	90
BBBEE Status Level of Contribution	10

13. TERMS AND CONDITIONS

- 13.1 SALGA reserves the right to terminate the appointment or any part thereof; at any stage of completion should SALGA decide not to proceed with the project.
- 13.2 Should the contract between SALGA and the service provider be terminated by either party due to reasons not attributed to the service provider, the service provider will be remunerated for the appropriate portion of work completed.
- 13.3 On completion or termination of the agreement, all materials and products must be handed over to SALGA.
- 13.4 No information concerning the tender or award of the tender may be made available by the bidder to other parties.

14. ENQUIRIES

For further information, please send enquiries in writing to the following:

scm@salga.org.za