

AGSA/08/2024

Request for Proposal (RFP) for the appointment of a service provider for the provision of a Holistic Wellbeing Programme for the Auditor-General South Africa (AGSA) for a period of five (5) years.

Closing date: 16 April 2025
at 15h00

Important Note: Compulsory Briefing session will take place on 02 April 2025 from 11h00 via MS Teams



**A U D I T O R - G E N E R A L
S O U T H A F R I C A**

Auditing to build public confidence



TABLE OF CONTENTS

SECTION 1: GENERAL CONDITIONS OF BID	4
1. General Information	5
2. Enquiries	5
3. Compulsory Briefing Session	5
4. Bid Validity Period	5
5. Instructions on submission of Bids	5
6. Preparation of Bid Response	6
7. Supplier Performance Management	7
8. AGSA's Rights	7
9. Undertakings by the Bidder	8
10. Reasons for disqualification	8
11. Returnable Schedules	9
12. Evaluation Criteria and Weightings	10
SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION	13
SECTION 3: COST PROPOSAL	41
SECTION 4: ANNEXURES	46
Annexure 1: Acceptance of Bid Conditions and Bidder's Details	47
Annexure 2: Tax Compliance Requirements	50
Annexure 3: Supply chain management practices questionnaire	51
Annexure 4: Declaration of Interest	53
Annexure 5: Certificate of Independent Bid Determination	57
Annexure 6: Shareholders and Directors Information	60
Annexure 7: B-BBEE CLAIM FORM	62
Annexure 8: Disclosure Statement	65
Annexure 9: Privacy & Protection of Personal Information Act 4 of 2013 Requirements	66
Appendix A1 - A7 - National Support Centre	
Appendix B - Clinical Protocols	
Appendix C - Dedicated Professionals	
Appendix D - National Affiliates 1	



- Appendix E - National Affiliates 2**
- Appendix F - Track Record**
- Appendix G - Reporting**
- Appendix H - Executive Facilities**
- Appendix I - Cost Proposal Input Sheet**



SECTION 1: GENERAL CONDITIONS OF BID



1. General Information

The Auditor-General of South Africa (AGSA) is a Chapter 9 Constitutional Institution with a mandate to strengthen our country's democracy by enabling oversight, accountability and governance in the public sector through auditing, thereby building public confidence. The AGSA has identified a need for the services as detailed in this Request for Proposal (RFP).

2. Enquiries

- 2.1 All communication and attempts to solicit information of any kind relative to this RFP should be channelled **in writing** to:

Name: Mr. Lugmaan N Moosa
Email address: LugmaanM@agsa.co.za

- 2.2 Enquiries in relation to this RFP will not be entertained after **16h00 on 08 April 2025**.
- 2.3 The enquiries will be consolidated and AGSA will issue one response and such response will be posted, within three days after the last day of enquiries, onto the AGSA website (www.agsa.co.za) under tenders i.e. next to the same RFP document.
- 2.4 The AGSA may respond to any enquiry in its absolute discretion and the bidder acknowledges that it will have no claim against the AGSA on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

3. Compulsory Briefing Session

- 3.1 There will be a compulsory briefing session to be held on **02 April 2025 at 11h00 am** via an MS Teams meeting.
- 3.2 Important information will be shared with bidders around the expectations on this tender which requires bidders to attend, as failure to attend will lead to ineligibility to submit a tender response and to be considered for subsequent evaluations.
- 3.3 Bidders must send their company name and e-mail addresses of their representatives who will be joining in the MS Teams meeting to LugmaanM@agsa.co.za before **12h00 on or before Tuesday, 01 April 2025**.

4. Bid Validity Period

Responses to this RFP received from bidders will be valid for a period of **120** days counted from the bid closing date.

5. Instructions on submission of Bids

- 5.1 Bid responses must be submitted /deposited into the AGSA's tender box.
- 5.2 The closing date for the submission of bids is **16 April 2025** not later than **15h00**. No late bids will be considered. Tender documents must be deposited in the tender box situated at:



Procurement Tender Box

Auditor-General South Africa, Head-office,
Reception Area, Ground Floor,
4 Daventry Street,
Lynnwood Bridge Office Park,
Lynnwood Manor,
Pretoria

Bids sent to any other address other than the one specified herein will be disqualified and will not be considered for evaluation. It is the bidder's responsibility to ensure that the bid is sent to the correct address and that this is **received** by the AGSA before the closing date and time in AGSA's dedicated tender box.

5.3 The AGSA will not be held responsible for any of the following:

5.3.1 bid responses sent to the incorrect address.

5.4 Only bid responses received via the tender box will be considered.

5.5 Where a complete bid response (inclusive of all relevant schedules) is **not received** by the AGSA in the tender box by the closing date and time, such a bid response will be regarded as incomplete and late. Such late and / or incomplete bid will be disqualified.

5.6 Bidders must submit their responses in hard copy (one original hard copy). Included in the hard copy response must be one duplicate soft /electronic copy of the entire bid response on a Universal Serial Bus (USB). Failure to provide both hard and soft copy responses may render your response as incomplete.

5.7 This bid document is made available at no cost to bidders and is available in PDF format and also in an editable format (MS Word document). **The AGSA's tender requirements should not be altered by bidders and the PDF format serves as the basis for this.**

6. Preparation of Bid Response

6.1 All the documentation submitted in response to this RFP must be in English.

6.2 The bidder is responsible for all the costs that it shall incur related to the preparation and submission of the bid document.

6.3 Bids submitted by bidders which are or are comprised of companies must be signed by a person or persons duly authorised thereto by a resolution of the applicable Board of Directors, a copy of which resolution, duly certified, must be submitted with the bid.

6.4 The bidder should check the numbers of the pages of its bid to satisfy itself that none are missing or duplicated. No liability will be accepted by AGSA in regard to anything arising from the fact that pages of a bid are missing or duplicated.



- 6.5 Bidder's tax affairs with the South African Revenue Service (SARS) must be in order (tax compliant status) and bidders must provide written confirmation to this effect as part of their tender response.

7. Supplier Performance Management

- 7.1 Supplier Performance Management is viewed by the AGSA as a critical component in ensuring value for money acquisition and good supplier relations between the AGSA and all its suppliers.
- 7.2 The successful bidder shall upon receipt of written notification of an award, be required to conclude a Memorandum of Agreement (MoA) with the AGSA, which will form an integral part of the supply agreement. The MoA will serve as a tool to measure, monitor, and assess the supplier performance and ensure effective delivery of service, quality and value-add to AGSA's business.
- 7.3 Successful bidders will be required to comply with the above condition and also provide a scorecard on how their product / service offering is being measured to achieve the objectives of this condition.

8. AGSA's Rights

- 8.1 The AGSA is entitled to amend any bid condition, bid validity period, RFP specification, or extend the bid closing date, all **before the bid closing date**. All bidders, to whom the RFP documents have been issued and where the AGSA have record of such bidders, may be advised in writing of such amendments in good time and any such changes will also be posted on the AGSA's website under the relevant tender information. All prospective bidders should therefore ensure that they visit the website regularly and before they submit their bid response to ensure that they are kept updated on any amendments in this regard.
- 8.2 The AGSA reserves the right not to accept the lowest priced bid. The AGSA normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the AGSA.
- 8.3 The AGSA reserves the right to award this bid as a whole or in part.
- 8.4 The AGSA reserves the right to conduct site visits at the bidder's corporate offices and / or at client sites if so required.
- 8.5 The AGSA reserves the right to consider the guidelines on prescribed consultancy rates as set out in the **National Treasury Instruction Note on Cost Containment Measures**, where relevant.
- 8.6 The AGSA reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the AGSA to conduct background checks, including FICA verification, on the bidding entity and any of its directors / trustees / shareholders / members.
- 8.7 The AGSA reserves the right of final decision on the interpretation of its tender requirements and responses thereto.



9. Undertakings by the Bidder

- 9.1** By submitting a bid in response to the RFP, the bidder undertakes to offer or render all or any of the services described in the bid response submitted by it to the AGSA on the terms and conditions and in accordance with the specifications stipulated in this RFP document.
- 9.2** The bidder shall prepare for a possible presentation should AGSA require such and the bidder will be required to make such presentation within three to five (3-5) days from the date the bidder is notified of the presentation. Such presentation may include a practical demonstration of products or services as called for in this RFP, where relevant.
- 9.3** The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the AGSA during the bid validity period indicated in this RFP and its acceptance shall be subject to the terms and conditions contained in this RFP document read with the bid.
- 9.4** The bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents; and that the price(s) and rate(s) cover all his/her obligations under a resulting contract for the services contemplated in this RFP; and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.
- 9.5** The successful bidder accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under the supply agreement and SLA (or as referred to as the MoA) to be concluded with the AGSA, as the principal(s) liable for the due fulfilment of such contract.
- 9.6** The bidder accepts that all costs incurred in the preparation, presentation and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with its bid will become AGSA property unless otherwise stated by the bidder/s at the time of submission.

10. Reasons for Disqualification

- 10.1** The AGSA reserves the right to disqualify any bidder which does any one or more of the following, and such disqualification may take place without prior notice to the offending bidder, however the bidder will be notified in writing of such disqualification:
- 10.1.1 bidders who are not tax compliant and / or who do not submit an original valid Tax Compliance Status PIN and / or proof of application of such as endorsed by SARS on the closing date and time of the bid submission and / or failure to provide the AGSA with its SARS issued Tax Verification PIN code giving access to the AGSA to electronically verify tax compliance;
- 10.1.2 bidders who submit incomplete information and documentation according to the requirements of this RFP document;
- 10.1.3 bidders who submit information that is fraudulent, factually untrue or inaccurate information;
- 10.1.4 bidders who receive information not available to other potential bidders through fraudulent means;



- 10.1.5 bidders who do not comply with any of the **mandatory requirements** as stipulated in the RFP document including non-attendance of the compulsory briefing session, where applicable;
- 10.1.6 bidders who fail to comply with FICA and POPIA requirements as listed herein.

11. Returnable Schedules

Bidders shall submit their bid responses in accordance with the returnable schedules specified below (each schedule must be clearly marked):

11.1 Cover Page: (The cover page must clearly indicate the RFP reference number, bid description and the bidder's name)

11.2 Schedule 1

11.2.1 Executive Summary (explaining how the bidder understand the requirements of this RFP and the summary of the proposed solution)

11.2.2 Annexure 1 of this RFP document (duly completed and signed)

11.3 Schedule 2

11.3.1 Valid Tax Compliance Status PIN (TCS PIN) and / or proof of application as endorsed by SARS and / or SARS issued tax verification PIN code;

11.3.2 Originally certified copies of bidder's CIPC company registration documents listing all members with percentages;

11.3.3 Copy of Board Resolution, duly certified;

11.3.4 Originally certified copy of ID document for the Company Representative (signatory of the bid document)

11.3.5 Annexure 2 of this RFP document (duly completed and signed);

11.3.6 Annexure 3 of this RFP document (duly completed and signed);

11.3.7 Annexure 4 of this RFP document (duly completed and signed);

11.3.8 Annexure 5 of this RFP document (duly completed and signed);

11.3.9 Annexure 6 of this RFP document (duly completed and signed);

11.3.10 Response to Annexure 7: BEE Claims Form;

Bidders must submit a B-BBEE verification certificate indicating the contribution level of the bidding entity. For Exempted Micro Enterprises (EME) with an annual revenue of less than R10 million and Qualifying Small Enterprises (QSE) with an annual revenue of between R10 million and R50 million per annum, a sworn affidavit confirming the annual total revenue and level of black ownership may be submitted. Any misrepresentation in terms of the declaration constitutes a criminal offence as set out in the B-BBEE Act as amended.

Note: If a bidder is a Consortium, Joint Venture (JV) or Prime Contractor with Sub-contractor(s), the documents listed above must be submitted for each Consortium/ JV member or Prime Contractor and Sub-contractor(s).

11.3.11 Annexure 8 of this RFP document (duly responded to);



- 11.3.12 Annexure 9 of this RFP document (duly completed and signed);
- 11.3.13 Statement of Financial Position of the Bidder: Latest Audited Financial Statements (where applicable in terms of the Company's Act) and/or independently reviewed financial statements and/or cash flow Budget for new entities with no financial records.
- 11.3.14 Copy of Joint Venture/ Consortium/ Sub-contracting Agreement duly signed by all parties (if applicable).
- 11.4 Schedule 3:** Response to Section 2 of this RFP document, in line with the format indicated in this RFP document.
- 11.5 Schedule 4:** Price Proposal (response to Section 3 of this RFP document) (*Must be submitted as a separate file/document marked as Schedule 4: Price Proposal*)

12. Evaluation Criteria and Weightings

Bids shall be evaluated in terms of the following process:

- 12.1 Phase 1: Initial Screening Process:** During this phase, bid responses will be reviewed for purposes of assessing compliance with RFP requirements including the general bid conditions, which requirements include the following:
- Submission of a valid Tax Compliance Status PIN as referenced in 11.3.1 above
 - Submission of Company Registration Forms as referenced in 11.3.2 above
 - Submission of ID copy for the Company Representative as referenced in 11.3.4 above
 - B-BBEE Status Certification as referenced in 11.3.10 above
 - Completion of all Standard Bidding Documents and other requirements, as reflected in this RFP, which covers the following:
 - Section 2: Statement of compliance with the Functional Evaluation Criteria for this RFP;
 - Section 3: Cost Proposal and Price Declaration Form;
 - Annexure 1: Acceptance of Bid Conditions;
 - Annexure 2: Tax Compliance Requirements;
 - Annexure 3: Supply Chain Management Questionnaire;
 - Annexure 4: Declaration of Interest;
 - Annexure 5: Certificate of Independent Bid Determination;
 - Annexure 6: Shareholders' Information/ Group Structure;
 - Annexure 7: B-BBEE Claim Form;
 - Annexure 8: Disclosure Statement;
 - Annexure 9: Privacy & Protection of Personal Information Act 4 of 2013 Requirements



Failure to comply with the requirements assessed in Phase 1 (compliance), may lead to disqualification of bids.

12.2 Phase 2: Technical/ Functionality Evaluation

Bid responses will be evaluated in accordance with the functional criteria as follows:

12.2.1 Pre-qualification Criteria (Mandatory Criteria)

The technical assessment will commence with the pre-qualifying criteria as listed in section 2 of this RFP document.

Note: All bidders that fail to comply with any of the mandatory criteria shall not be considered for further evaluation on *Other Functional/ Technical Requirements*.

12.2.2 Other Functional/ Technical Requirements

With regards to the other Functional requirements, the following criteria (set out in more detail on section 2 of this RFP document) and the associated weightings will be applicable:

EVALUATION CRITERIA	WEIGHT
1. Knowledge, Experience and Expertise	15
2. Bidder's track record	10
3. Clinical protocols and procedures	7
4. National affiliates of qualified and registered clinical/counselling psychologists and social workers	18
5. National affiliates of qualified and registered occupational therapist and other relevant specialists	18
6. Selection criteria for appointing national affiliates	5
7. Reporting (integrated reporting system)	12
8. Facilities and resources for an executive programme	10
9. Methodology/ Approach	5
TOTAL	100

Note: The minimum qualifying score for functionality is 70% or points. Only bidders that score 70% or points on functionality will be shortlisted for Site Visits.



12.3 Phase 3: Site Visits

With regards to the Site Visit requirements, the following criteria (set out more in detail on section 2 of this RFP document) and the associated weightings will be applicable:

EVALUATION CRITERIA	WEIGHT
1. Section A - National Support Centre	60
2. Section B - Executive Care Facility	40
TOTAL	100

Note: The minimum qualifying score for Site Visits is 70% or points. Only bidders that achieve the minimum qualifying score on Site Visits will be considered for further evaluation on Price and B-BBEE.

12.4 Phase 4: Preference Point System

All bids that achieve the minimum qualifying score for demonstration (acceptable bids) will be evaluated further in terms of the preference point system to determine the final score, as follows:

CRITERIA	POINTS
Price	80
B-BBEE	20
TOTAL	100



SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION



1. SPECIAL INSTRUCTION TO BIDDERS

- a. Should a bidder have reasons to believe that the requirement Specification is not open and/or is written for a particular brand or product or service provider; the bidder shall notify AGSA Procurement within five (5) days after publication of the RFP.
- b. Bidders shall provide full and accurate answers to the questions posed in this document, and, where required explicitly state “Comply/Not Comply” regarding compliance with the requirements. Bidders must substantiate their response to all questions, including full details on how their proposal/solution will address specific functional/ technical requirements. All documents as indicated must be supplied as part of the bid response.

2. PROJECT BACKGROUND AND PURPOSE

The (AGSA) is the supreme audit institution (SAI) of South Africa. The AGSA has a constitutional mandate and, as the SAI of South Africa, exists to strengthen our country’s democracy by enabling oversight, accountability and governance in the public sector through auditing, thereby building public confidence.

As part of enhancing organisational effectiveness in the AGSA, the AGSA has taken a strategic decision to enhance its Employee Value proposition by implementing a comprehensive Holistic Wellbeing programme focusing on the health, wellness and safety of all employees.

The Holistic Wellbeing programme is the cornerstone to drive a high performance culture, encourage positive behaviour and improve talent retention. A key objective is to intuitively assess and report on AGSA employee health and wellness trends by analysing data and business intelligence resources.

3. SCOPE OF WORK

In view of the above, the AGSA hereby request proposals from bidders for the provision of a Holistic Wellbeing programme for the scope of work as follows.

The AGSA requires the following service categories:

3.1. SERVICE 1: EMPLOYEE ASSISTANCE PROGRAMME (EAP)

- Employee assistance programme (per capita for 3 900 employees) should provide psychosocial support from both qualified and registered professional bodies, clinical



- / counselling psychologist, and social workers, depending on the presenting problem.
- Counselling services that address threat and intimidation and sexual harassment to be provided to employees and their immediate families in all 11 official South African languages.
 - The services are to be available 24/7/365 via a dedicated toll-free access line (including other networks such as those used by cell phone telecommunication companies etc.) and immediate access to the national support centre.
 - In addition, the service provider should provide unstructured supplementary service data (USSD) and any related options for the employee and family members.
 - The support must be customised to the presenting problem to resolve psychosocial issues (including threats and intimidation as well as sexual harassment) for each individual and must be confidential in nature.
 - The psychosocial support provided should follow appropriate operational procedures and clinical protocols.

The program must include the following services:

3.1.1. Toll-free telephonic supportive services (unlimited 24/7/365)

- Telephonic counselling (limitless - 24/7/365) for employees and immediate family members.
- Must be available in all 11 South African official languages by qualified and registered clinical/counselling psychologists and social workers.
- The service must adhere to the national support centre service delivery metrics with clear timelines of accessibility of all services.

3.1.2. Personnel face-face counselling

- Counselling for employees and immediate family members available in all 11 official South African languages throughout the country (reasonably closer to individual's residence or place of work) by qualified and registered clinical/counselling psychologists and social workers.
- The face-to-face counselling sessions should be a maximum of six (6) sessions per problem per individual; and two (2) additional sessions at the discretion of the service provider's clinical case manager, depending on the merits of each problem. The clinical case manager with impeccable knowledge and vast experience in the field of EAP and EWP must be dedicated to the AGSA for quality control purposes.



- The qualified and registered clinical / counselling psychologists and social workers should identify issues early on that are contra-indication to counselling (such as personality disorders, eating disorders or psychotic disorders) to refer employees and immediate family members to appropriate specialised services for treatment at the cost of the employee and immediate family member. Such specialised treatment regimes are outside the scope of EAP.

3.1.3. Telephonic (unlimited – office hours) support in life services, management services (legal services, financial wellness, family care support)

Should be provided to employees and family members to assist them to manage their work-life challenges and responsibilities as follows:

- **The first component** of the life management services should entail legal wellness. This should provide employees and family members with detailed and practical information: education, counselling, resources and referrals on the broad range of legal issues such as customer affairs, estate and wills planning, voluntary surrender of estate, social benefits as well as any other related support that might emerge as a need or trend.

The legal wellness should neither include labour law matters nor court representation.

- **The second component** of the life management services should entail financial wellness. This should assist employees and family members with empowerment to make informed financial decisions and to instil sustainable financial growth to employees and family members who are challenged by debts including debt management and debt counselling.

This service should further include financial planning and payments; retirement support; bank solution; budget assistance; understanding credit health through credit reports; motor and household insurances; garnishee orders and any other related support that might emerge as a trend. This telephonic financial wellness should be provided in all 11 official languages during office hours by qualified and registered financial experts.

- **The third component** of the life management should entail family care support. This entails the provision of information and guidance on a broad range of family related issues such as immigration; special needs placement; expatriate adjustments, parental guidance; residential facilities; educational and community



resources; preschool programmes, care giving guidance; dependent care as well as vocational guidance.

The above-mentioned is not an exhaustive list as this may include any other related support emerging as a need or trend. The family care support should be provided by the multi-functional team of qualified and registered clinical/counselling psychologists and social workers; medical professionals; financial and legal experts with expertise and experience including areas of elderly and childcare support.

3.1.4. Managerial consultancy and coaching (managerial consultation, assisted referrals and formal referrals) unlimited - offices hours.

- This service entails providing managerial support to all line managers responsible for team members to be equipped with people management skills and how to deal with difficult people management challenges.
- The service should further focus on three (3) components, namely line manager's consultation; managerial referrals (formal referrals or informal/assisted referrals) as well as conflict mediation services.
- The first two (2) components (line manager's consultation and managerial referrals) should be provided through telephonic and electronic engagements that follow standardised procedures.
- The face-to-face counselling support should be provided to referred employees by qualified and registered clinical / counselling psychologist and social workers at the place nearer to home or place of work.
- The managerial consultation and coaching should also provide group capacity building programme to line managers on how to identify employees "at risks" to uproot underlying causes to poor performance, absenteeism, and on-the-job performance (presenteeism). The group capacity building programme should be provided onsite by qualified and registered clinical / counselling psychologists specialising on work-related/ employee- employer challenges.
- The conflict mediation services should focus on equipping employees and line managers with coping mechanism and communication skills to mitigate risk of impact to work outputs/deliverables. which inevitably impact negatively on employee's health and wellness. This support should be provided through arranged face to face engagements onsite. All these three services should be provided by qualified and registered clinical/counselling psychologists who have



impeccable knowledge and experience in conflict mediation cases to be impactful to avoid secondary emotional harm.

3.1.5. Onsite clinic for psychosocial (counselling and financial wellness) nationally.

- The onsite clinic for psychosocial (including threats and intimidations and sexual harassment) counselling and financial wellness should be provided once a week at the AGSA Head Office located in Pretoria, Lynwood and once a week in regional offices during off peak periods.
- This support should follow standardised procedures for financial wellness and clinical protocols for onsite psychosocial support.
- The onsite financial wellness should be provided by qualified and registered financial experts while the onsite psychosocial counselling should be provided by the qualified and registered psychologists and social workers.

3.1.6. Interactive wellness website

- This should include comprehensive assistance portals; personalised email service; interactive applications; downloadable and print resources; resources for health and wellness including information on various medical conditions, stress management, disabilities, substance addiction and life-threatening illness; professional advisory services; posters; pamphlets and newsletters.

3.1.7. Trauma management programme

- Should focus on providing prompt and professional emotional support to individual employees and immediate family members who experienced personal and/or work-related traumatic incidents (including threats and intimidations).
- Group traumatic intervention should be provided to employees, immediate family members and to team members including affected contract workers (CWCs) from contracted audit firms and bystanders (within AGSA's premises) where necessary (as once-off support). The former should be provided onsite and offsite, including in hospitals, homes (where appropriate) and as per arrangement with the employee and family.
- The group trauma intervention should be provided by a national affiliate of qualified and registered clinical / counselling psychologists and social workers who are specialising in the field of trauma intervention following clinical protocols on trauma intervention. The former should be characterised by trauma diffusing (implemented within 24 hours) and trauma debriefing (implemented within 48 to



72 hours) as well as follow up after the intervention to ensure sustainability of the support provided.

3.1.8. Emotional impact sessions

- Should be provided by a national affiliate of qualified and registered clinical/counselling psychologists to groups of team members to assist with a range of work-related challenges (subtle intimidations from clients/auditees; push backs/contestations; low morale; poor communication; lack. of trust) to rebuild resilience, emotional containment, support, and exploration of coping strategies.

3.1.9. Orientation sessions

- Management and employee **orientation sessions** should be provided where necessary.

3.1.10. Working wellness

- For employee wellness champions should be provided by the service provider to nominated group of employees advocating and championing for EWP.

3.1.11. Knowledge sharing sessions

- On national and international (new and impactful) developments within the wellness industry.

3.1.12. Telephonic and electronic medical advice (*not diagnosis*)

- On dealing and/or supporting family members with chronic medical conditions including life-threatening illnesses should be provided to employees and immediate family members by qualified and registered medical experts including nurses.

3.1.13. Maternity programme (value add service)

- Offered to pregnant employees and their partners as well as employees planning pregnancy.
- This service should be aimed at proving support and advice to pregnant employees throughout all stages of the pregnancy, from planning through the antenatal period and delivery to the post-natal period.
- Employees to be supported and guided through the poste delivery and return-to-work phase.



3.1.14. Marketing and promotion

- Should include communication strategy, launch strategy and ongoing communication and promotional services, including electronic and print materials for all employees.

3.1.15. Stakeholder engagement and account management services

- Should be provided through a dedicated account manager / client relationship manager with a minimum qualification of the master's degree in employee assistance programme (EAP) with impeccable knowledge and experience in EWP to be a strategic partner to the AGSA to mitigate risk of misalignment in monitoring and evaluation of the programme.
- The engagements and utilisation reports should focus on identification and interpretation of trends and themes to assist AGSA to analyse and customise cost-effective proactive initiatives to be implemented as emerging needs.
- The former should be provided monthly, quarterly, and annually.
- The former should also be provided as and when required (ad hoc) based on the emerging need of the AGSA with specification that will be communicated to the dedicated account manager/client relationship manager.

3.1.16. Confidentiality

This is the cornerstone of AGSA's holistic wellbeing programme and other components of the employee wellness programme (EWP).

- The former should always 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 Employee Assistance Professional Association -South Africa (EAPA).
- 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 AGSA, unless written consent is provided by the individual as 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, the information shared by the individual that pose a life threat to own or other persons or own or other people's properties including organisation/AGSA's 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.

3.2. SERVICE 2: EXEC CARE PROGRAMME (*fee for service*)

3.2.1. Executives

This should entail comprehensive executive well-being assessments for all executives, which includes the following:

- Lifestyle risk assessment, e.g. smoking, lack of exercise, diet and nutrition, travelling.
- Past risk: factors such as family history, previous illnesses, and surgeries.
- Review of medical history and recommendations for tests and follow-ups needed.
- Comprehensive medical examination, including neurological system, cardiovascular system, gastro-intestinal system, respiratory system, Musculo skeletal system, body mass index, body composition analysis, posture analysis, resting and effort ECG (using multistage incremental treadmill testing methodology), lung function testing. visual screening, cardiac and stroke risk profiling, cardiovascular efficiency calculation, fitness testing as well as assessment of stress levels and coping mechanisms)
- Blood, urine and stool tests (lipogram, glucose, urea and creatinine, liver function, full blood count, ESR, ultrasensitive CRP, urine, uric acid, TSH and PAP smear (females), PSA (males) and stool for occult blood.
- Chest X-ray or other radiological investigations as required.
- Gynaecological ultrasound.
- Ultrasound for liver.
- Supplementary interventions which includes bio kineticist-led wellness coaching for fitness and ergonomics, structured nutritional intervention plan, psycho-emotional training and therapeutic massage.
- Well-being counselling by qualified and registered psychologists.
- Extensive personal report.



- Referral and liaison.
- Individual follow-ups.
- Executive health profile.

3.3. SERVICE 3: LIFESTYLE MANAGEMENT *(fee for service)*

This should include a range of lifestyle-related programmes such as:

- Wellness days (health risk assessments and voluntary counselling and testing) nationally.
- Healthy eating lifestyle (Biggest Winner and Be The Best You Can Be) nationally.
- Health and wellness related campaigns e.g. cancer awareness; flu vaccines and vitamin B vaccinations, TB awareness particularly to audit team auditing at institutions where the risk of contracting TB is high.
- Life threatening illnesses, mental illness, malaria prevention and treatment for team members working in pro-malaria areas nationally etc.

This service should be provided to employees and by qualified and registered relevant medical experts including nurses, dieticians, and any other relevant qualified professionals.

3.4. SERVICE 4: INCAPACITY MANAGEMENT *(fee for service)*

- To entail high-frequency absenteeism and ill-health (chronic medical conditions) for reasonable accommodation (including disability cases that might lead to disability claims with contracted AGSA's insurer), which impact negatively on employees' work performance.
- These services should be provided by the national footprint of qualified and registered occupational therapists and/or occupational medical doctors to assist AGSA to determine work capacity (including Functional Capacity Evaluations) for employees with high frequency of absenteeism and ill-health (chronic medical conditions).
- The disability (chronic medical conditions) disclosures should be assessed by the qualified and registered occupational therapist to assist the AGSA with verification and recommendations on reasonable accommodating employees who disclosed disabilities/chronic medical conditions voluntary to the organisation.
- The assessment and feedback report should be provided as per appropriate protocols and procedures within timelines. The dedicated qualified and registered



occupational therapist should be provided to be part of the tripartite (including representative from the insurer) for the purpose of quality control, streamlining, monitoring and evaluating efficient and effective service to the AGSA.

3.5. SERVICE 5: DISABILITY MANAGEMENT *(fee for service)*

- Disability disclosure to be assessed, qualified and registered occupational therapists to assist the AGSA with verification and recommendations on reasonably accommodating employees who disclose disabilities / chronic medical conditions voluntarily to the organisation.
- The verification process should entail telephonic consultation with employees, referral to a medical practitioner to complete the verification document where required and submission of the verification form to the AGSA. Should there be a requirement for reasonable accommodation, the referrer should indicate if further assistance or evaluations can be authorised from the AGSA.
- Assessment and feedback reports should be provided as per appropriate protocols and procedures within relevant timelines.
- The service provider should conform to confidentiality requirements regarding disclosure and receipt of medical information or other confidential information.
- The service provider is to provide the AGSA's EWP unit with a feedback report within two (2) weeks after finalisation of all assessments and evaluation.

3.6. SERVICE 6: PROACTIVE ENGAGEMENT WITH REGISTERED CLINICAL / COUNSELLING PSYCHOLOGIST OR SOCIAL WORKERS *(fee for service)*

- This should include four (4), hour long sessions for mental ill health proactive engagements with registered clinical / counselling psychologists or social workers.

3.7. SERVICE 7: MUSCULOSKELETAL HEALTH MANAGEMENT PROGRAMME *(fee for service)*

- To be provided onsite as face-to-face consultations by qualified and registered physiotherapists and/or ergonomists. Support should be provided to employees with sedentary (spending much time seated working on laptop) physical demands for postural assessment, well-being advice and support.



- Musculoskeletal prevention programme to focus on musculoskeletal disorders / injuries in the workplace. Tailored work environment training and practical prevention workshops, including but not limited to safe lifting techniques (manual handling), back-care principles and ergonomic workstation layout.

To be scheduled as follows:

- Ergonomics risk assessment carried out yearly.
- Back-care principles through interactive sessions on back saving principles including information on exercise, posture, and safe lifting techniques.
- Safe Lifting techniques delivered through practical sessions on safe load handling. Training to be adjusted to work environments and loads handled.
- Ergonomics through practical sessions on appropriate office ergonomics including working from alternative locations (AWL) and demonstration of workstation layout, importance of micro-breaks etc.

Sessions to be interactive and provide a platform for participants to ask questions about musculoskeletal conditions.

- Practical and interactive ergonomic and MSK awareness sessions (45 minutes) for maximum of 10 employees per session.
- Practical discussion with participants on ergonomic adjustments with available equipment (45 minutes) of 10 employees per session.
- Service provider to submit a report within 2 weeks after the service of participants feedback and recommendations regarding further adjustments that should include recommendation on workstation changes or suggested equipment.
- Employees to be equipped with basic knowledge to optimise their workstations according to ergonomic principles to practice correct biomechanical postures in the workplace as well as using the workstations correctly.

3.8. Service 8: Predictive data analysis software

- The use of historical data and machine learning to identify how likely it is that a future event will happen. By analysing historical information, predictive analytics algorithms can spot patterns and trends, giving end users a better idea of how a given scenario will play out.



- Apply predictive analytics for the holistic wellbeing programme to multiple healthcare and work-related problems with the goal of improving wellbeing outcomes, reducing costs, and optimizing how resources are used.
- The service provider will manage all data coming from the support centre and will provide AGSA with reports, however, live data on the rate of engagement by employees making use of the holistic wellbeing programme, amongst other metrics, will be required.
- Monthly and quarterly reports will be required, engagement with AGSA business units, customised and tailor-made reports when required.
- The system must be capable of producing dashboards and these dashboards should provide an overview of problem trends, engagement rates, predictive data and recommendations, where possible.

3.9. Service 9: Occupational health and safety

- The main goal of workplace wellness and occupational health and safety program is to protect and improve worker health, safety and wellbeing. Integrating wellbeing and occupational health and safety (OHS) supports a holistic wellbeing programme to prevent injury, illness and promote overall healthy behaviours.
- Protecting the health, safety and wellbeing of employees will ultimately lead to higher job satisfaction and productivity, staff will gain peace of mind knowing that their safety is valued, and the organisation experiences minimized disruptions due to a healthier workforce and favourable outcomes at Head Office and all Regional BU's. To ensure an engaged and productive workforce that leads to organisational success. The holistic wellbeing program to support and assist with work-related injuries and illnesses, OHS communication, disability and rehabilitation management and Compensation for Occupational Injuries and Diseases claims support.
- It should further aim to support:
 - An engaged and productive workforce that leads to organisational success.
 - To assist and support the AGSA with OHS and Department of Employment and Labour compliance, during inspections when they take place at Head Office or any Regional Business Unit.



4. PERIOD OF THE CONTRACT

The contract period is five (5) years commencing on the date of sign-off of the contract.

5. TECHNICAL EVALUATION CRITERIA

Bidders shall be evaluated in terms of the following criteria:

5.1 Pre-qualification criteria (mandatory criteria):

The bidder must indicate their compliance/ non-compliance to the following requirements and to substantiate as required. The bidder must respond in the format below, where additional information is provided/ attached somewhere else; such information must be clearly referenced. Failure to comply with the below pre-qualification requirements will lead to automatic disqualification of the bid.

Note: Where a criterion stipulates that substantiation/ evidence is required then only a tick will not be accepted as compliance, but the corresponding substantiation/ evidence must be provided to support the statement of compliance. Failure to provide the relevant substantiation/ evidence where required will lead to automatic disqualification of the bid.

Bidder to select / tick Comply or Not Comply below.

5.1.1 Registration with professional bodies/ councils	Comply	Not Comply	Page Ref No:
a) The bidder must be registered with the Employee Assistance Professional Association (EAPA) professional body. <i>The bidder must submit valid proof (i.e. certificate/ letter) confirming its registration status with EAPA.</i>			
b) All clinical staff, proposed by the bidder, must be registered with the Health Professions Council of South Africa (HPCSA) and/ or South African Council for Social Service Professions (SACSSP) <i>The bidder must submit a list of all clinical staff as well as valid proof of registration/ membership (i.e. certificate/ letter) confirming registration status with HPCSA and/ or SACSSP for each resource.</i>			



5.1.1 Registration with professional bodies/ councils	Comply	Not Comply	Page Ref No:
<p>Substantiate your compliance by providing evidence and including page numbers in the proposal.</p>			

5.1.2 National Support Centre	Comply	Not Comply	Page Ref No:
<p>The bidder must have a fully capacitated national support centre available 24/7/365 for the employee assistance programme. The national support centre should be staffed by:</p> <ul style="list-style-type: none"> • qualified and registered clinical/ counselling psychologists and social workers (including some who specialise in trauma intervention); • qualified and registered (psychosocial) counsellors for debriefing, assessment and referrals to qualified and registered clinical/ counselling psychologists and social workers; • financial experts; and • legal experts (lawyers, attorneys and paralegals). <p><i>The bidder is required to complete Appendix A1 to A7 to substantiate compliance with this requirement.</i></p>			
<p>Substantiate your compliance by completing the relevant appendix including evidence (where applicable) and including page numbers in the proposal.</p>			

5.1.3 Clinical protocols and procedures	Comply	Not Comply	Page Ref No:
<p>The bidder is required to have the following clinical protocols and procedures in place:</p> <ol style="list-style-type: none"> a) National support centre's service delivery metrics with clear timelines of accessibility of all services (turn-around time to answer calls and respond to USSD and other related option/s). b) National support centre's psychosocial clinical protocols. c) National support centre's psychosocial standardised procedures. d) National support centre's trauma management clinical protocol. 			



5.1.3 Clinical protocols and procedures	Comply	Not Comply	Page Ref No:
<p>e) National support centre’s managerial consultation and coaching procedure.</p> <p>f) National support centre’s financial wellness standardised procedures.</p> <p>g) National support centre’s legal wellness standardised procedures.</p> <p>h) National support centre’s family support procedure.</p> <p>i) Clinical protocols for national affiliates (clinical/counselling psychologists and social workers)</p> <p>j) Clinical protocols for national affiliates specialising in trauma management (clinical/counselling psychologists and social workers).</p> <p>k) Quality control procedures for national affiliates (clinical/counselling psychologists and social workers).</p> <p>l) Quality control procedures for national affiliates specialising in trauma management (clinical/counselling psychologists and social workers).</p> <p>m) Quality control procedures for financial wellness.</p> <p>n) Quality control procedures for legal wellness.</p> <p>o) Quality control procedure for family support.</p> <p>p) Quality control procedure for occupational therapist.</p> <p>q) Clinical protocols for occupational therapists.</p> <p>r) Standardised procedures for incapacity management.</p> <p>s) Standardised procedures for disability disclosure.</p> <p>t) Clinical protocols for health risks assessments.</p> <p>u) Clinical protocols for HIV counselling and testing (HCT).</p> <p>v) Clinical protocols for onsite psychosocial counselling (clinical/counselling psychologists and social workers).</p> <p>w) Clinical protocol on confidentiality and any other related ethics and procedure for exceptions to confidentiality</p> <p><i>The bidder is required to complete Appendix B to substantiate compliance with this requirement.</i></p>			
<p>Substantiate your compliance by completing the relevant appendix including evidence (where applicable) and including page numbers in the proposal.</p>			



5.1.4 Dedicated professionals	Comply	Not Comply	Page Ref No:
<p>The bidder must provide three (3) dedicated professionals who must be permanently employed by the bidder. The professionals are:</p> <ul style="list-style-type: none"> • a dedicated account manager/ client relationship manager with a minimum of three (3) years relevant experience. • a dedicated clinical case manager to be responsible for quality control who is qualified and registered as a clinical/ counselling psychologist or qualified and registered social worker with a minimum of three (3) years relevant experience. • a dedicated qualified and registered occupational therapist with a minimum of four (4) years relevant experience responsible for quality control, evaluation and monitoring. <p>All three (3) professionals must have impeccable knowledge and expertise in the Holistic Wellbeing field and provide proof of qualification and/ or registration/ membership with the relevant professional bodies/ councils.</p> <p><i>The bidder is required to complete Appendix C to substantiate compliance with this requirement.</i></p>			
<p>Substantiate your compliance by completing the relevant appendix including evidence (where applicable) and including page numbers in the proposal.</p>			

5.1.5 National footprint (affiliates) of qualified clinical/counselling psychologists and social workers	Comply	Not Comply	Page Ref No:
<p>The bidder must have a national footprint (affiliates) that is well-balanced of qualified clinical/ counselling psychologists and social workers registered with own relevant professional bodies. The qualified clinical/counselling psychologists and social workers should be located in all areas where employees and family members can easily access the sessions at the affiliate's practice rooms that are close to places of residence or work.</p> <p><i>The bidder is required to complete Appendix D to substantiate compliance with this requirement.</i></p>			



Substantiate your compliance by completing the relevant appendix including evidence (where applicable) and including page numbers in the proposal.

5.1.6 National footprint (affiliates) of qualified and registered occupational therapists and/or occupational medical doctors and relevant specialists	Comply	Not Comply	Page Ref No:
<p>The bidder must have national footprint (affiliates) of qualified and registered occupational therapists and/or occupational medical doctors and relevant specialists in the field of incapacity management and disability disclosures.</p> <p><i>The bidder is required to complete Appendix E to substantiate compliance with this requirement.</i></p>			
<p>Substantiate your compliance by completing the relevant appendix including evidence (where applicable) and including page numbers in the proposal.</p>			

5.2 Other technical evaluation criteria

The bidder must provide proof of documentation to the following requirements to substantiate what they have submitted as required. The bidder must package the response according to the format below and where additional information is provided/ attached somewhere else; such information must be clearly referenced. Bidders must obtain at least 70% or points on the technical evaluation to be considered further. Bidders that fail to achieve 70% or points shall be disqualified.

The technical evaluation stage shall also include Presentations, and scoring will be based on a combination of desktop evaluations and presentations. Evaluation criteria that require Presentations have been marked below. Bidders shall be invited to deliver presentations on the specified evaluation criteria.



No.	Technical Evaluation Criteria	Applicable scoring guideline	Weighting	Page Ref No:
5.2.1	<p>Knowledge, Experience and Expertise</p> <p>The bidder must submit an organisational structure of its operations indicating relevant service focus areas in delivering Holistic Wellbeing offerings to clients. Bidders are required to have the staff members listed below in its permanent employ.</p> <p>CVs (including proof of registration to professional bodies and citing relevant knowledge, experience and expertise) must be provided as substantiation for the respective resources</p>		15%	
5.2.1.1	Client Relationship Manager	<ul style="list-style-type: none"> • >4 years' relevant experience (2 points) • 3 - 4 years' relevant experience (1.5 points) • <3 years' relevant experience (0 points) <p><i>If more than one resource is proposed for each profession, the average number of years' experience shall be used for scoring purposes</i></p>	3%	
5.2.1.2	Psychologists		3%	
5.2.1.3	Social Workers		2%	
5.2.1.4	Registered Counsellors for short term support		3%	
5.2.1.5	Trauma support counsellors		2%	
5.2.1.6	Legal experts		2%	
<p>Substantiate your compliance by providing full and accurate information and cross reference to the relevant section of your proposal.</p>				



No.	Technical Evaluation Criteria	Applicable scoring guideline	Weighting	Page Ref No:
5.2.2	<p>Bidder's track record</p> <p>The bidder must provide an in-depth record of accomplishment of similar work carried out specific to Holistic Wellbeing Programmes i.e. psychological, social and health aspects.</p> <p>The bidder must provide at least five (5) reference letters for the past three (3) years (2021-2024) from clients with more than 3000 employees. References from AGSA will not be accepted.</p> <p>The bidder must complete in full Appendix F to provide details of each client for evaluation purposes.</p>	<ul style="list-style-type: none"> • >5 references provided from clients with more than 3000 employees within the past 3 years (3 points) • 3 - 5 references provided from clients with more than 3000 employees within the past 3 years (2.5 points) • <3 reference letters provided from clients with more than 3000 employees within the past 3 years (1 point) • No reference letters provided or reference letters provided does not meet the qualifying criteria (0 points) 	10%	
<p>Substantiate your compliance by providing full and accurate information and cross reference to the relevant section of your proposal.</p>				
5.2.3	<p>Clinical protocols and procedures - <u>Bidder presentation will be required</u></p> <p>The bidder must demonstrate how it will implement its clinical protocols and procedures in rendering services to the AGSA.</p>	<ul style="list-style-type: none"> • Bidder provided adequate information (desktop) and provided a satisfactory presentation of the requirements (1 point) • Information provided and/ or presented is not adequate (0 points) 	7%	
<p>Substantiate your compliance by providing full and accurate information and cross reference to the relevant section of your proposal.</p>				



No.	Technical Evaluation Criteria	Applicable scoring guideline	Weighting	Page Ref No:
5.2.4	<p>National affiliates of qualified and registered clinical/counselling psychologists and social workers</p> <p>The bidder must provide lists of national affiliates, in the format as specified in Appendix D, of qualified and registered clinical/counselling psychologists and social workers including those who specialises in trauma management.</p> <p>These national affiliates must be located in areas around AGSA's regional offices/ South African provinces taking into account the size of each province and should be at reach to employees and family members seeking psychosocial and trauma management support.</p> <p>Bidders shall be expected to meet the minimum number of qualified/ registered professionals required per province. Evidence of valid qualifications/ registrations must be submitted for each professional.</p>		18%	
5.2.4.1	Gauteng	<ul style="list-style-type: none"> Meets or exceeds the minimum number of qualified/ registered professionals including relevant evidence for each professional (1 point) Does not meet the minimum number of qualified/ registered professionals or relevant evidence for professionals not provided (0 points) 	2%	
5.2.4.2	Limpopo		2%	
5.2.4.3	Kwa-Zulu Natal		2%	
5.2.4.4	Eastern Cape		2%	
5.2.4.5	Western Cape		2%	
5.2.4.6	Northern Cape		2%	
5.2.4.7	North West		2%	
5.2.4.8	Mpumalanga		2%	
5.2.4.9	Free State		2%	



No.	Technical Evaluation Criteria	Applicable scoring guideline	Weighting	Page Ref No:
5.2.5	<p>National affiliates of qualified and registered occupational therapist and other relevant specialists</p> <p>The bidder must provide lists of national affiliates, in the format as specified in Appendix E, of qualified and registered occupational therapists and/or occupational medical doctors and other relevant specialists. These national affiliates must be located in areas around AGSA's regional offices/ South African provinces taking into account the size of each province and should be at reach to employees and family members seeking psychosocial and trauma management support.</p> <p>Bidders shall be expected to meet the minimum number of qualified/ registered professionals required per province. Evidence of valid qualifications/ registrations must be submitted for each professional.</p>		18%	
5.2.5.1	Gauteng	<ul style="list-style-type: none"> Meets or exceeds the minimum number of qualified/ registered professionals including relevant evidence for each professional (1 point) Does not meet the minimum number of qualified/ registered professionals or relevant evidence for professionals not provided (0 points) 	2%	
5.2.5.2	Limpopo		2%	
5.2.5.3	Kwa-Zulu Natal		2%	
5.2.5.4	Eastern Cape		2%	
5.2.5.5	Western Cape		2%	
5.2.5.6	Northern Cape		2%	
5.2.5.7	North West		2%	
5.2.5.8	Mpumalanga		2%	
5.2.5.9	Free State		2%	
<p>Substantiate your compliance by providing full and accurate information and cross reference to the relevant section of your proposal.</p>				



No.	Technical Evaluation Criteria	Applicable scoring guideline	Weighting	Page Ref No:
5.2.6	<p>Selection criteria for appointing national affiliates - <u>Bidder presentation will be required</u></p> <p>The bidder will be required to demonstrate, in detail, the process followed when selecting qualified/ registered professionals that represents its national affiliate network.</p> <p>The presentation should cover, as an example, how affiliates are identified, verifications/ checks performed, performance measurement, quality assurance, accountability, etc.</p>	<ul style="list-style-type: none">• Adequate demonstration of selection process for national affiliates (1 point)• Demonstration of selection process for national affiliates not adequate (0 points)	5%	
Substantiate your compliance by providing full and accurate information and cross reference to the relevant section of your proposal.				



No.	Technical Evaluation Criteria	Applicable scoring guideline	Weighting	Page Ref No:
5.2.7	<p><u>Reporting (integrated reporting system) - Bidder presentation will be required for predictive data analysis</u></p> <p>The bidder will be required to demonstrate the following:</p> <ul style="list-style-type: none"> • Dashboard / live reporting (AGSA access) • Monthly reports • Quarterly reports • Annual reports • Ad hoc reports • Predictive data analysis reporting dashboard must be included in the bidder's presentation. <p>The reports must meet the minimum standards, as defined by AGSA from time to time as well as reasonable timelines as agreed by both parties. The reports should provide a statistical analysis that includes the number of employees using the service, a trend analysis, benchmarking within the same industry, critical areas of concern, a comparative according to the AGSA audit cycles and financial years, and recommendations.</p> <p>The bidder must complete Appendix G to substantiate its compliance with this requirement.</p>	<ul style="list-style-type: none"> • The sample reports meets the requirements, provides relevant information and demonstrates good understanding (3 points) • The sample reports partially meets the requirements but lacks detail and clarity (2 points) • The sample reports fails to meet the requirements or demonstrates a lack of understanding (1 point) • No sample reports provided (0 points) 	12%	
<p>Substantiate your compliance by providing full and accurate information and cross reference to the relevant section of your proposal.</p>				



No.	Technical Evaluation Criteria	Applicable scoring guideline	Weighting	Page Ref No:
5.2.8	<p>Facilities and resources for an executive programme</p> <p>The bidder must have a facility based in Gauteng and an additional 2 facilities located nationally for the executive wellbeing programme, with fittings and finishes combined with high-tech exercise and diagnostic equipment to deliver a superb experience.</p> <p>Registered professionals such as medical doctors, nutritionists, bio-kineticists, affiliated pathologists, and other relevant professionals will be required to be accessible at each facility.</p> <p>The facility(s) can be owned by the bidder or be part of an affiliate network.</p> <p>The bidder must complete Appendix H to substantiate its compliance with this requirement.</p>	<ul style="list-style-type: none"> • Facility in Gauteng including 2 facilities in 2 other provinces (3 points) • Facility in Gauteng including 1 facility in another province (2.8 points) • Facility in Gauteng only (2.5 points) • No facilities proposed or No facility in Gauteng (0 points) 	10%	
<p>Substantiate your compliance by providing full and accurate information and cross reference to the relevant section of your proposal.</p>				



No.	Technical Evaluation Criteria	Applicable scoring guideline	Weighting	Page Ref No:
5.2.9	Methodology/ Approach - <u>Bidder presentation will be required</u> The bidder will be required to demonstrate its engagement model explaining how it intends on delivering holistic wellbeing services to the AGSA including oversight and management	<ul style="list-style-type: none">• Adequate demonstration of methodology/ approach covering all key aspects (1 point)• Demonstration of methodology/ approach not adequate and key aspects not covered (0 points)	5%	
Substantiate your compliance by providing full and accurate information and cross reference to the relevant section of your proposal.				
Total Score			100%	

Note: The minimum qualifying score for functionality is (70 out of 100) points. All bidders must obtain at least 70% or points on the technical evaluation stage to be considered further to the next phase. Bidders that fail to achieve 70% or points shall be disqualified.



5.3 Site Visits

Bidders that achieve a minimum of 70% or points on the technical evaluation stage shall be shortlisted for Site Visits. The evaluation criteria below shall be used when assessing the respective sites.

No.	Evaluation Criteria	Applicable scoring guideline	Weighting
5.3.1	Section A - National Support Centre		60%
a)	Does the bidder have a physical site for the purpose of operating a national support centre?	Yes - 1 No - 0	10%
b)	Is the national support centre adequately capacitated with relevant staff members? (Minimum staff requirements should be a shift supervisor/ manager and case managers)	Yes - 1 No - 0	10%
c)	Does the site have the necessary technology infrastructure (hardware, software, networks)?	Yes - 1 No - 0	10%
d)	Does the site have adequate data management and security protocols?	Yes - 1 No - 0	10%
e)	Does the site have adequate back-up power?	Yes - 1 No - 0	10%
f)	Good location / quiet set-up	Yes - 1 No - 0	10%
5.3.2	Section B - Executive Care Facility		40%
a)	Well maintained and professional environment i.e. Facilities and Equipment	Yes - 1 No - 0	10%
b)	Tranquil and peaceful environment	Yes - 1 No - 0	10%



No.	Evaluation Criteria	Applicable scoring guideline	Weighting
c)	Health Centre - Patient Care / Biokinetics / Executive wellness screening / holistic and multidisciplinary in nature. Quality medical and risk assessment.	Yes - 1 No - 0	10%
d)	Does the bidder have a physical facility that offers executive wellness services? (Facilities designed with executives in mind)	Yes - 1 No - 0	10%
Total Score			100%

Bidders must obtain at least 70% or points on Site Visits stage to be considered further for Price and B-BBEE evaluations. Bidders that fail to achieve 70% or points will be disqualified from the process.



SECTION 3: COST PROPOSAL



SECTION 3: COST PROPOSAL

1 **NOTE: All prices must be VAT inclusive and must be quoted in South African Rand (ZAR).**

2 Are the rates quoted firm for the full period of the contract?

YES	NO

Important: If not firm for the full period, please refer to paragraph 5 below to provide details of the basis on which price adjustments shall be applied e.g CPI ,etc.

3 All additional costs associated the bidder's offer must be clearly specified and included in the Total Bid Price.

4

Is the proposed bid price linked to the exchange rate?	Yes	No
<p>If yes, the bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate:</p> <p>For purposes of this tender, the ZAR Rate to be quoted on for major foreign currencies should be as follows: 1 US Dollar to ZAR – R18.37 1 British Pound to ZAR – R23.82 1 EURO to ZAR – R19.99</p> <p>Note – this is the South African Reserve bank rate as of 13 March 2025 and will apply to evaluate price proposals during the tender evaluation stage. Any Rate of exchange fluctuations will be addressed as part of contract negotiations with the recommended bidder. Bidders proposing pricing in any other foreign denomination, should clearly indicate such with the associated ZAR rate as of 13 March 2025.</p>		

5 **Price**

5.1 Is the proposed bid price subject to any escalations?

Yes	No

5.2 If the proposed bid price is subject to any escalations, then please stipulate, in detail, the following:

	Response from bidder
5.2.1.Which price line item(s) is subject to escalations?	
5.2.2.What is the escalation percentage (%) for the affected price line item(s)?	
5.2.3.What is the frequency of escalation for the affected price line item(s)?	
5.2.4.Is the escalation percentage fixed or variable for the affected price line item(s)?	
5.2.5.What is the escalation(s) based on whether fixed or variable? (e.g. CPI, fixed price increases in line with business operating model, etc.)	
5.2.6.Is any price line item(s) linked to the exchange rate? If yes, then stipulate the relevant line item(s).	
5.2.7.Was the stipulated RoE, as provided in the table above, applied to the foreign currency conversion?	



6

Payments will be linked to specified deliverables after such deliverables have been approved by the AGSA. Payments will be made within 30 days from date of invoice.	Comply	Not Comply

7

The AGSA reserves the right to consider the guidelines on consultancy rates as set out in the National Treasury Instruction Note on Cost Containment Measures , where relevant.	Comply	Not Comply
The bidder must indicate if their proposed rates are in line with the provisions of the referenced National Treasury Instruction: Cost Containment Measures.		
Substantiate / Comments		



8 COSTING MODEL FOR FIVE (5) YEARS – REFER TO APPENDIX I FOR THE COST PROPOSAL INPUT SHEET WHICH MUST BE COMPLETED IN FULL AND SUBMITTED

SUMMARY OF THE COST PROPOSAL

NO.	DESCRIPTION	BIDDER'S PROPOSED COST
1.	Employee Wellness programme	
2.	Leadership care programme	
3.	Lifestyle Management	
4.	Incapacity management	
5.	Disability management	
6.	Proactive engagement with registered clinical/counselling psychologist or social worker	
7.	Musculoskeletal health management	
8.	Predictive data analysis software	
	TOTAL	



Price Declaration Form

Dear Sir/Madam,

Having read through and examined the Request for Proposal (RFP) Document, RFP no. **AGSA/08/2024**, the General Conditions, and all other Annexures to the RFP Document, we offer to provide a Holistic Wellbeing Programme for the Auditor-General South Africa (AGSA) for a period of five (5) years at a total cost of:

R.....
..... (Including VAT)

In words

R.....
..... (Including VAT)

We confirm that this price covers all activities associated with the service, as called for in the RFP document. We confirm that AGSA will incur no additional costs whatsoever, other than in respect of VAT, over and above this amount in connection with the provision of this service.

We undertake to hold this offer open for acceptance for a period of 120 days from the date of submission of offers. We further undertake that upon final acceptance of our offer, we will commence with the provision of the required service when required to do so by the AGSA.

We understand that you are not bound to accept the lowest or any offer, and that we must bear all costs which we have incurred in connection with preparing and submitting this bid.

We hereby undertake for the period during which this bid remains open for acceptance, not to divulge to any persons, other than the persons to whom the bid is submitted, any information relating to the submission of this bid or the details therein except where such is necessary for the submission of this bid.

SIGNED

DATE

(Print name of signatory)

Designation _____

FOR AND ON BEHALF OF: COMPANY NAME _____

Tel No: _____

Cell No: _____



SECTION 4: ANNEXURES



Annexure 1: Acceptance of Bid Conditions and Bidder's Details

Request for Proposal No: _____

Name of Bidder: _____

Authorised signatory: _____

Name of Authorised
Signatory: _____

Position of Authorised
Signatory: _____

By signing above the bidder hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this RFP.

BIDDING STRUCTURE

Indicate the type of Bidding Structure by marking with an 'X':	
Individual Bidder	
Joint Venture/ Consortium	
Prime Contractor with Sub-Contractors	
Other	

REQUIRED INFORMATION

If Individual Bidder:	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Email address	
Postal Address	
Physical Address	



If Joint Venture or Consortium, indicate the following for each partner:	
Partner 1	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Email address	
Postal Address	
Physical Address	
Scope of work and the value as a % of the total value of the contract	
Partner 2	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Email address	
Postal Address	
Physical Address	
Scope of work and the value as a % of the total value of the contract	



If bidder is a Prime Contractor using Sub-contractors, indicate the following:	
Prime Contractor	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Email address	
Postal Address	
Physical Address	
Subcontractors	
Name of Company	
Company Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Email address	
Postal Address	
Physical Address	
Sub-contracted work as a % of the total value of the contract	



Annexure 2: Tax Compliance Requirements

1. TAX COMPLIANCE REQUIREMENTS		
1.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.		
1.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.		
1.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.		
1.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.		
1.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS PIN.		
2. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS		
2.1	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.2	DOES THE BIDDER HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.3	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.4	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
<p>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 1.3 ABOVE.</p>		
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	

Annexure 3: Supply chain management practices questionnaire

Request for Proposal No: _____

Name of Bidder: _____

Authorised signatory: _____

[Note to the Respondent: The Respondent must complete the information set out below. If the Respondent requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with Returnable Schedule 2.]

The bidder must complete the following questionnaire.

Bidder's past supply chain management practices:

Item	Question	Yes	No
3.1	<p>Is the Bidder or any of its directors listed on the South African National Treasury's database as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this database were informed in writing of this restriction by the South African National Treasury after the <i>audi alteram partem</i> rule was applied).</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
	If so, provide particulars:		
3.2	<p>Is the Bidder or any of its directors listed on the Register for Bid Defaulters in terms of section 29 of the <i>Prevention and Combating of Corrupt Activities Act</i> No 12 of 2004?</p> <p>To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Bid Defaulters" or submit your written request for a hard copy of the Register to facsimile number +27123265445.</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
	If so, provide particulars:		
3.3	<p>Was the Bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>



Auditing to build public confidence

Item	Question	Yes	No
	If so, provide particulars:		
3.4	Does the Bidder relate to any AGSA employee or part of AGSA current or past staff (employee) establishment?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
	If so, provide particulars:		
3.5	Was any contract between the Bidder and any organ of state (within the Republic of South Africa or within any foreign territory) terminated during the past five years on account of failure to perform on or comply with the contract?		
	If so, provide particulars:		

I, _____ (print name) hereby certify that the information, facts and representations are correct and that I am duly authorized to sign on behalf of the company.

Name of Company: _____

Company Registration Number: _____

Company VAT Registration Number: _____

Signature

Date



Annexure 4: Declaration of Interest

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
 - The bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
 - 2.1 Full Name of bidder or his or her representative:

 - 2.2 Identity Number:

 - 2.3 Position occupied in the Company (director, trustee, shareholder²):

 - 2.4 Company Registration Number:

 - 2.5 Tax Reference Number:

 - 2.6 VAT Registration Number:

 - 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

¹“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);



- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Name of state institution at which you or the person connected to the bidder is employed:
.....

Position occupied in the state institution:

Any other particulars:
.....
.....
.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attached proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:



Auditing to build public confidence

.....
.....
.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:
.....
.....
.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.9.1 If so, furnish particulars.
.....
.....
.....

2.10 Are you, or any person connected with the bidder (i.e. shareholder, partner, director etc.), aware of any relationship (family, friend, other) between any other bidder or any other company and any person employed by the AGSA who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.10.1 If so, furnish particulars.
.....
.....
.....



2.11 Do you or any of the directors / trustees / shareholders / members YES/NO
of the company have any interest in any other company whether or not
they are bidding for this contract? The AGSA reserves the right to undertake
further background checks on any other company where partners, shareholders
or any interested party of the bidder may be involved in and to consider any
findings in this regard as part of its vetting processes.

2.11.1 If so, furnish particulars:

.....
.....
.....

3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Tax Reference Number	State Employee Number / Persal Number

DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT AGSA MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature Date

.....
Position Name of bidder



Annexure 5: Certificate of Independent Bid Determination

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:



CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:



-
- (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid;
or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
 9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
 10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder



Auditing to build public confidence

Annexure 6: Shareholders and Directors Information

[Note to the bidder: the bidder must complete the information set out below. If the bidder requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with Returnable Schedule 2.]

6.1 Shareholders/ Members

Name of the shareholder	ID Number	Race	Gender	% shares

Note: The bidder must also attach the detailed Company/ Group Structure where relevant.

6.2 Black Shareholders/ Members as per the B-BBEE Certificate

Name of the shareholder	ID Number	Race	Gender	% shares
Total Black Shareholding % as per the current and valid B-BBEE Certificate				



6.3 Directors

Name of the shareholder	ID Number	Race	Gender

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

Annexure 7: B-BBEE CLAIM FORM

This preference form must form part of all invited bids. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE.

General Conditions

- 1.1 Failure on the part of a bidder to submit a valid B-BBEE certificate issued or a certified copy by a verification professional regulator or Affidavits in respect of EME's and QSE's will be allocated a score of "0" for B-BBEE points
- 1.2 The AGSA reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the AGSA.

Definitions

- 1.3 "all applicable taxes" includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;
- 1.4 "B-BBEE" means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- 1.5 "B-BBEE status level of contributor" means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the B-BBEE Act;
- 1.6 "bid" means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;
- 1.7 "Broad-Based Black Economic Empowerment Act" means the Broad-Based Black Economic Empowerment Act, Act No. 53 of 2003 ("B-BBEE Act");
- 1.8 "comparative price" means the price after the factors of a non-firm price and all unconditional discounts that can be utilised have been taken into consideration;
- 1.9 "consortium or joint venture" means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract;
- 1.10 "contract" means the agreement that results from the acceptance of a bid by an organ of state;
- 1.11 "EME" means an Exempted Micro Enterprise as defined by Codes of Good Practice issued in terms of section 9 (1) of the B-BBEE Act No 53 of 2003;
- 1.12 "QSE" means a Qualifying Small Enterprise as defined by Codes of Good Practice issued in terms of section 9 (1) of the B-BBEE Act No 53 of 2003;
- 1.13 "Firm price" means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 1.14 "functionality" means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;



- 1.15 “non-firm prices” means all prices other than “firm” prices;
- 1.16 “person” includes a juristic person;
- 1.17 “rand value” means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes;
- 1.18 “sub-contract” means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;
- 1.19 “total revenue” bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the B-BBEE Act and promulgated in the Government Gazette on 9 February 2007; Adjudication Using a Point System
- 1.20 The bidder obtaining the highest number of total points will be awarded the contract.
- 1.21 Preference points for this tender has been set at the 80/20 system. Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts. If all bids exceed R50m, after prices are brought to a comparative basis, then all bids shall be evaluated on the 90/10 system. In the event that even one (1) bid is below the R50m threshold then the 80/20 system shall apply.
- 1.22 Points scored must be rounded off to the nearest 2 decimal places.
- 1.23 In the event that two or more bids have scored equal total points, the successful bid will be the one scoring the highest number of preference points for B-BBEE.
- 1.24 However, when functionality is part of the evaluation process and two or more bids have scored equal points including equal preference points for B-BBEE, the successful bid must be the one scoring the highest score for functionality.
- 1.25 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

Points Awarded for B-BBEE Status Level of Contribution

- 1.26 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 Status Level of Contributor	Number of points (80/20 system)	Number of points (90/10 system)
1	20	10
2	18	9
3	14	6
4	12	5
5	8	4
6	6	3
7	4	2
8	2	1
Non-compliant contributor	0	0

- 1.27 A bidder who qualifies as an EME or QSE in terms of the B-BBEE Act must submit an affidavit confirming Annual Total Revenue and Level of Black Ownership.



- 1.28 A bidder other than EME or QSE must submit a valid B-BBEE certificate or a certified copy thereof issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA)
- 1.29 A 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 certificate.
- 1.30 A consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 1.31 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialised scorecard contained in the B-BBEE Codes of Good Practice.
- 1.32 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends to sub-contract 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 bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.
- 1.33 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 EME that has the capability and ability to execute the sub-contract.

Bid Declaration

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

B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF THIS ANNEXURE

- 1.35 B-BBEE Status Level of Contribution:

..... = (Maximum of 20 points)

Annexure 8: Disclosure Statement

Disclosure Statement

In terms of the tender condition 8.6, which allows the AGSA to conduct background checks on bidders and its shareholders and directors, the AGSA hereby requires bidders to provide the following additional information:

- 9.1 The AGSA considers the integrity of its appointed service providers to be of critical importance. The AGSA reserves the right to disqualify from further consideration, any bidder whose integrity, based on past conduct (during the 5 years immediately preceding the bid submission date), it considers questionable.
- 9.2 To this end, the AGSA requires each bidder to include in its bid, a disclosure statement which details the following (with sufficient information and supporting documentation for the AGSA to make its own assessment as to the materiality or seriousness of allegations regarding the bidder's integrity or conduct):
 - 9.2.1 any criminal charges made against the bidder or any of its directors, shareholders or management officials regarding their professional conduct;
 - 9.2.2 any civil proceedings initiated against the bidder or any of its directors, shareholders or management officials regarding their professional conduct; and
 - 9.2.3 any other enquiry or similar proceedings initiated or threatened against the bidder or any of its directors, shareholders or management officials regarding their professional conduct.
- 9.3 Where the bidder is a consortium, the disclosure statement referred to in paragraph 9.2 above must be made separately in respect of each consortium partner.
- 9.4 In the event that the bidder's circumstances change, after submission of its bid, in regard to any matter referred to in paragraph 9.2 above or in regard to any matter referred to in its disclosure statement, the bidder must submit a written notification to AGSA indicating the nature and extent of such changed circumstances.
- 9.5 The AGSA reserves the right to seek such additional information from any bidder, in respect of the disclosure statement referred to in paragraph 9.2 above, as it may, in its sole discretion, determine, whether such information has been requested under this RFP or otherwise, and may require the bidder to make oral presentations for clarification purposes or to present supplementary information, in respect of the disclosure statement if so required by the AGSA.
- 9.6 Based on its own assessment of the contents of the bidder's disclosure statement and any publicly available information which is relevant to the contents of such disclosure statement, the AGSA will decide whether the bidder's conduct or any allegations relating thereto pose a risk, reputational or otherwise, to the AGSA; and if it reaches an adverse conclusion the AGSA will in its sole discretion have the right to disqualify a bidder from further participation in the tender process. Disqualification on this ground may be done at any stage in the bid evaluation process prior to contract award.

Annexure 9: Privacy & Protection of Personal Information Act 4 of 2013 Requirements

Request for Proposal No:	
Name of Bidder:	
Authorised signatory:	

Protecting personal information is important to the Auditor General South Africa (AGSA). To do so, AGSA follows general principles in accordance with applicable privacy laws and the Protection of Personal Information Act 4 of 2013 (POPIA).

Bidders are therefore required to complete the below and submit as part of their bid response:

Consent to process information according to Popia

- a) The bidder gives consent and accepts that the information provided by the bidder shall be used for the purpose of evaluation and adjudication of this bid. This includes use of the data provided by a bidder to perform due diligence checks involving the collection of personal data from third parties (e.g. clients of the bidder, Sars, CIPC) to validate claims and to gather important information for the purpose of evaluation and adjudication of this bid. This may include the collection of publicly available data.

YES/NO

- b) The bidder gives consent and accepts that the AGSA may use personal data to investigate potential risks such as fronting, criminal conduct and unethical conduct, for the protection of its rights and for the purpose of evaluation and adjudication of this bid. The AGSA may also share personal data with relevant authorities for investigation of criminal conduct and for other lawful purposes.

YES/NO

- c) The AGSA may share the bidder's personal data with third parties to support our bid evaluation processes.

YES/NO

- d) Bidders must be aware that personal information collected as a result of this process may be used for secondary purposes such as the internal and external audit process.

YES/NO

- e) The bidder's personal data shall be kept confidential and be used for the purpose intended for this bid and shall not be shared with third parties for unrelated or unlawful purposes. In addition, the information shall be handled in line with record retention guidelines and be disposed of when the

timelines in the guidelines have been reached. Any request for deletion of personal information shall be acceded to in line with legislative requirements. Should such deletion impact on the evaluation, adjudication, awarding and contract phases, the bidder shall be informed and such impact effected.

YES/NO

- f) Bidders must note that if they do not provide consent and submit their personal information as required, the AGSA would be unable to evaluate your bid. This complies with section 18 (1) (d) (e) of the Popia, meaning submission of such personal information is voluntary, and the consequences of not submitting such personal information is that the AGSA would not be able to process your submission.

YES/NO

Information security measures that the AGSA implements

The AGSA secures personal information in its possession and control through technical and organisational safeguards, which it has implemented to protect the integrity and confidentiality of personal information in accordance with generally accepted information security practices and procedures.

I, _____ (print name) hereby certify that the information, facts and representations are correct and that I am duly authorized to sign on behalf of the company.

Name of Company/ Entity: _____

Company/ Entity Registration Number: _____

Company/ Entity VAT Registration Number: _____

Signature (Company/ Entity Representative)

Date