



**Warning against tender scams:** The WRC urges members of the public to report any suspicious Request for Quotation, Purchase Order or Letter of Award to its Fraud Hotline on 0800 227 007 or email: [confidential@wisecall.eu.com](mailto:confidential@wisecall.eu.com). If a request or procurement communication appears to be suspicious Suppliers are advised to contact the WRC Supply Chain Management office on 012 761 9300 to verify its authenticity

## PART A INVITATION TO BID (SBD1)

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE WATER RESEARCH COMMISSION (WRC)</b>					
RFQ/P NUMBER:	<b>089/09/22-23</b>	CLOSING DATE:	<b>19 OCTOBER 2022</b>	CLOSING TIME:	<b>24h00</b>
DESCRIPTION OF GOODS/SERVICES	<b>RE-ISSUE OF APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF DEVELOPMENT AND IMPLEMENTATION OF AN EMPLOYEE HEALTH AND WELLNESS ASSISTANCE PROGRAMME FOR 5 YEARS</b>				
<b>BID RESPONSE DOCUMENTS MAY BE EMAILED TO : <a href="mailto:quotations@wrc.org.za">quotations@wrc.org.za</a> (No hand delivered quotation or sent to a different email than the one specified shall not be accepted)</b>					
<b>RFQ VALIDITY PERIOD: 60 DAYS</b>					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	Supply Chain Management		CONTACT PERSON	Supply Chain Management	
TELEPHONE NUMBER	012 761 9300		TELEPHONE NUMBER	012 761 9300	
E-MAIL ADDRESS	<a href="mailto:quotations@wrc.org.za">quotations@wrc.org.za</a>		E-MAIL ADDRESS	<a href="mailto:quotations@wrc.org.za">quotations@wrc.org.za</a>	
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3 ]
<b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					



## PART B TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>	
1.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2.	<b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>
1.3.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4.	<b>THE SUCCESSFUL BIDDER (WHERE APPLICABLE) WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>	
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE <a href="http://WWW.SARS.GOV.ZA">WWW.SARS.GOV.ZA</a> .
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6	WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7	NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

**NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

SIGNATURE OF BIDDER: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....  
(Proof of authority must be submitted e.g. company resolution)

DATE: .....



## **PART C STANDARD BIDDING DOCUMENTS**

(SBD FORMS – The SBD4 applies to all procurement, irrespective of the value and method of procurement, excluding petty cash purchases, and must be completed by all persons responding to the invitation.

(SBD FORMS – The SBD6.1 (is applicable to procurement of above R30 000), and must be completed by all persons responding to the invitation.

WRC reserves the right not to accept/eliminate/disqualify a quotation not accompanied by the completed prescribed SBD forms.

### **BIDDER'S DISCLOSURE**

### **SBD 4**

#### **1. PURPOSE OF THE FORM**

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

#### **2. Bidder's declaration**

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

<sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.



2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....  
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....  
.....

### 3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 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 consortium<sup>2</sup> will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 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.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

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<sup>2</sup> Joint venture or Consortium 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.



- 3.6 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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder



## SBD 6.1 PREFERENCE POINTS CLAIMED

### PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. 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, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.**

#### 1. GENERAL CONDITIONS

- 1.1. The following preference point systems are applicable to all bids:
  - 1.1.1. the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
  - 1.1.2. The 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).
- 1.2.
  - 1.2.1. The value of this bid is estimated to exceed/not exceed R50 000 000 (all applicable taxes included) and therefore the ..... preference point system shall be applicable; or
  - 1.2.2. Either the 80/20 or 90/10 preference point system will be applicable to this tender (delete whichever is not applicable for this tender).
  - 1.2.3. Either the 80/20 or 90/10 preference point system will be applicable to this tender (delete whichever is not applicable for this tender).
- 1.3. Points for this bid shall be awarded for:
  - 1.3.1. Price; and
  - 1.3.2. B-BBEE Status Level of Contributor.
- 1.4. The maximum points for this bid are allocated as follows:

	POINTS
<b>PRICE</b>	
<b>B-BBEE STATUS LEVEL OF CONTRIBUTION</b>	
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

- 1.5. Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.
- 1.6. Water Research Commission reserves the right to require either of a bidder, before a bid is adjudicated or at any time subsequently, to substantiate any claim concerning preferences, in any manner required by Water Research Commission.

#### 2. DEFINITIONS



- 2.1. **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- 2.2. **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 2.3. **“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 goods or services, through price quotations, advertised competitive bidding processes or proposals;
- 2.4. **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- 2.5. **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- 2.6. **“Functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- 2.7. **“prices”** includes all applicable taxes less all unconditional discounts;
- 2.8. **“proof of B-BBEE status level of contributor”** means:
- 2.8.1. B-BBEE Status level certificate issued by an authorized body or person;
- 2.8.2. A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
- 2.8.3. Any other requirement prescribed in terms of the B-BBEE Act;
- 2.9. **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- 2.10. **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

### **3. POINTS AWARDED FOR PRICE**

#### **3.1. THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS**

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20

or

90/10



$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

$P_s$  = Points scored for price of bid under consideration

$P_t$  = Price of bid under consideration

$P_{\min}$  = Price of lowest acceptable bid

#### 4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 4.1. In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

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



## 5. BID DECLARATION

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

## 6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

6.1. B-BBEE Status Level of Contributor:= .....(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

## 7. SUB-CONTRACTING

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

(Tick applicable box)

YES		NO	
-----	--	----	--

7.1.1. If yes, indicate:

7.1.1.1. What percentage of the contract will be subcontracted.....%

7.1.1.2. The name of the sub-contractor.....

7.1.1.3. The B-BBEE status level of the sub-contractor.....

7.1.1.4. Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES		NO	
-----	--	----	--

7.1.1.5. Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

Designated Group: An EME or QSE which is at last 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		



<b>Black people who are military veterans</b>			
<b>OR</b>			
<b>Any EME</b>			
<b>Any QSE</b>			

**8. DECLARATION WITH REGARD TO COMPANY/FIRM**

8.1. Name of company/firm: .....

8.2. VAT registration number: .....

8.3. Company registration number:.....

8.4. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

8.5. DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

8.6. COMPANY CLASSIFICATION

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

8.7. Total number of years the company/firm has been in business: .....

8.8. I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBEE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

8.8.1. The information furnished is true and correct;

8.8.2. The preference points claimed are in accordance with the General Conditions as



indicated in paragraph 1 of this form;

8.8.3. In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;

8.8.4. If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –

8.8.4.1. disqualify the person from the bidding process;

8.8.4.2. recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

8.8.4.3. cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

8.8.4.4. recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the Audi alteram partem (hear the other side) rule has been applied; and

8.8.4.5. Forward the matter for criminal prosecution.

### **COMPANY SIGNATURE CERTIFYING ALL SBD FORMS**

We are submitting a bid/quotation for the RFQ/P described under the TOR. The signature below confirms the completed SBD forms as correct and true.

<b>SBD 4</b>	<u><b>YES / NO</b></u>
<b>SBD 6.1</b>	<u><b>YES / NO</b></u>
Completed by:	
Signature:	
Company Name:	
Contact Telephone Number:	
Date:	



## **PART D**

### **TERMS OF REFERENCE / SCOPE OF WORK / SPECIFICATION**

#### **1. BACKGROUND AND INTRODUCTION**

The Water Research Commission (WRC) is a national entity established in terms of the Water Research Act (Act No 34 of 1971), to coordinate and fund water research in South Africa.

The WRC as a responsible employer has for many years now, offered an Employee Wellness Program in support of employees of the WRC. This program is designed to ensure we proactively assess and intervene in areas that impact the overall Wellness profile of our employees. At a personal level to employees, this program is made available to all employees and their direct family members. This is a key offering, with usage, it may protect the organisation from indirect costs linked to absenteeism and or a loss in productivity due to ineffective coping mechanisms and or burnout.

#### **2. SCOPE OF WORK: REQUIREMENT/SPECIFICATION**

The objective of this request for proposal is to invite Employee Wellness firms/companies to submit proposals for consideration, to be appointed for Development and Implementation of an Employee Health and Wellness Assistance Programme For 5 Years Period.

The scope of work is a comprehensive Employee Health and Wellness Programme consisting of the following core elements.

- EWP framework and policy review to align to best practice.
- The wellness program should include psychosocial, financial, legal, physical and emotional wellness components and should be tailored to both management and general employees of the WRC to direct and influence towards wellness.
- Should include a Wellness Survey annually to identify wellness risks within the business and develop initiatives to address same in line with the program.
- All support as part of the EWP offering should be provided using English as a basis with at least two African languages as a basis to support employees and their immediate family.
- The offering should include a face to face (virtually or in person) counselling offering at the WRC offices monthly.
- When required, on site or virtual counselling support should be made available to staff in the event of critical incident or trauma (this is an on-demand service).
- On an annual basis at least two programs should be run around Managerial support and consultancy on how to manage resilience and wellness within teams.



- Once a year an online integrated physical wellness program should be run for a minimum of 12 weeks (weight loss, diet and mindfulness should be included).
- Monthly Employee Wellness Empowerment sessions should be facilitated around key elements of wellness topical at the time. The emphasis of these sessions should balance managing potential pathology, psychological insight and proactive management of wellness.
- All consultants assigned to parts of the program, should be duly qualified to deliver the services within their sphere.
- All services should be rendered and available online, telephonically and face to face.
- Telephonic Health and medical support services.
- Life management service (financial, legal and family care advise).
- Dedicated client relationship manager for management and administration of the program.
- The Development and design of programs and framework in line with the WRC brand, for marketing of initiatives and programs should be provided on a continuous basis.
- Quarterly reporting on the activities on the program, intelligence around the absenteeism profile of the WRC and intelligence and insight into core factors that impact the wellness of employees in line with best practice and signals from engagements with employees through the service. These should include recommendations to remedy potential concerns.
- **Service provider to quote us on per head count considering that the staff complement is currently at 90 employees**

We therefore request the detailed quotation as per information provided above.

### 3. EVALUATION PHASES

The received proposals will be evaluated in different phases in order to arrive to the final phase of bid award, and the phases will be as follows:

- 3.1 Phase One – Screening of the minimum requirements documents
- 3.2 Phase Two – Pre-Qualification Criteria
- 3.3 Phase Three - Specification compliance
- 3.4 Phase Four – Technical Evaluation
- 3.5 Phase Five - Presentation
- 3.6 Price and Preference (B-BBEE)



### **3.1 Phase One (01): Screening of the minimum requirements documents**

In this phase All bids received will be verified for compliance and completeness of the submitted proposal per the below set of mandatory requirements. Bidders who fails to comply with the below requirements may be eliminated and bidders who comply with the below progresses to the next phase of technical evaluation.

- Bid forms must be properly received on the bid closing date and time specified on the invitation, fully completed, dated.
- Invitation to Bid (SBD 1) must be fully completed,
- Submission of a Valid SARS Tax Clearance Certificate together with Supplier SARS Tax Compliance Status Verification PIN to enable Water Research Commission to verify Tax Compliance status on SARS eFiling. NB: Bidders whom their Tax matters are not in order will not be considered for this bid.
- Submission of fully completed SBD 4 (Declaration of Interest),
- Submission of fully completed SBD 6.1 (Preference Claim Certificate),
- Submission of the original or certified B-BBEE Status Level Verification Certificate or original B-BBEE Sworn Affidavit in case of EME and QSE)
- Submission of Central Supplier Database (CSD) Compliance History Report.

NB: Any bidders who did not sign and submit any of the requested documents may be disqualified.

### **3.2 Phase Two (2): Pre-Qualification Criteria: Qualification and Expertise Required**

Bidders are required to submit the below listed requirements in order to comply with Phase two (2) of the evaluation; failure to comply with the pre-qualification shall lead to immediate elimination.

- Proof of membership to professional body of the Employee Assistance Programme Association.
- Proof of registration of all counsellors and psychologists with the HPCSA in this capacity.
- Minimum of 5 years rendering EWP services, which includes wellness assessments, absenteeism reporting and intervention design.
- Demonstration of capacity and experience to accommodate the needs as articulated in the
- A list of the previous and current companies to whom services were or are rendered.
- At least 3 written references from recent clients where an Employee Wellness Program or related services were rendered.

Only bidders who complied with the listed requirements will proceed to the next phase of evaluation.

### **3.3 Phase Three (3): Specification Compliance**

Service providers submitted price quotations / proposals will be checked against the specification to ascertain compliance. Service providers who fail to fully comply with the specification requirements will be eliminated.



### 3.4 Phase Four (4): Technical Evaluation

#### FUNCTIONALITY/TECHNICAL EVALUATION

**Note:** Functionality scoring will be on the sliding scale as per the below table:

SCORE	DESCRIPTION
1	Poor
2	Average
3	Good
4	Very Good
5	Excellent

#### **Technical Evaluation Criteria:**

No	Element	WEIGHTING
<b>1</b>	Demonstrate Knowledge and Experience of company (Company profile) (Scoring is in the sliding scale of 1 to 3) 1 - No Company Profile attached 2 - Company Profile does indicate some information related to employee wellness programme services 3 - Company Profile indicates comprehensive information around knowledge and experience of employee wellness programme	40
<b>2</b>	Capability of personnel (CV of consultants assigned to parts of the program, should be duly qualified to deliver the services within their sphere) (Scoring is in the sliding scale of 1 to 3) 1 - No CV's provided 2 - CV's provided with limited experience 3 - CV's provided with detailed experience of a minimum of 5 years' experience of employee wellness programme services and related qualifications.	20
<b>3</b>	Methodology – approach undertaken when providing employee wellness programme services (Scoring is in the sliding scale of 1-3) 1 - No detail provided 2 - Some information provided 3 - Full comprehensive information around the wellness programme services, responsible person as well as turnaround timelines	30
<b>4</b>	References – At least 3 formal written references from recent clients where an Employee Wellness Program or related services were rendered (3) (Scoring is in the sliding scale of 1 to 3) 1 - Only contact details provided 2- Less than 2 reference submitted or references provided have unrelated detail around type of services and work completed 3 - More than 2 references submitted related to employee wellness programme services	10

**NB! Minimum threshold to qualify to the next phase of evaluation, which is a presentation, the service provider needs to achieve a minimum of 80% of the above listed evaluation criteria.**



### 3.5 Phase Five (5): Presentation

#### Evaluation Criteria

No	Element	WEIGHTING
1.	Technical Knowledge and Experience of providing employee wellness programme services (Company profile) (Scoring is in the sliding scale of 1 to 3) 1 – minimum information presented 2 – information presented not adequate enough 3 – Comprehensive and adequate demonstration of technical ability to conduct employee wellness programme services	40
2	Presentation and Communication (Scoring is in the sliding scale of 1 to 3) 1 – The presentation was poorly communicated 2 – Not all aspects of the presentation were clear and some questions were answered adequately 3 - The presenter conducted the presentation in a clear and structured manner and answered all questions effectively	20
3	Methodology – approach undertaken when providing employee wellness programme services (Scoring is in the sliding scale of 1 to 3) 1 – no logic to the information presented 2 – some information related to the methodology process presented 3 – detail methodology of providing employee wellness programme services	40

**All successful bidders who achieved minimum of 80% on the Technical Evaluation will be invited for Presentation.**

### 3.6 Price and Preference (B-BBEE) Evaluation

Service providers who comply with set minimum threshold will be evaluated under Price and B-BBEE phase to determine the highest scoring bidder for recommendation.

#### Price and Preference (B-BBEE)

This bid will be evaluated on 80/20 preferential points

Criteria	Weight	Sub-criteria
Total Price	80/100	Benchmark against lowest quote
Contribution to BBEE	20/100	Points will be awarded to bidders according to their BBEE status level of contributor as indicated in the BBEE accreditation certification as indicated below:
BBEE LEVELS		SCORES
Level 1		20
Level 2		18
Level 3		14
Level 4		12
Level 5		8
Level 6		6
Level 7		4
Level 8		2
Non- compliant Contributor		0





#### 4. PRICING

The RFQ will be evaluated in terms of the Preferential Procurement Regulations (2017).

**Note:**

- ☐ Fees must be quoted in South African Rand.
- ☐ Price(s) quoted must be firm and inclusive of VAT where applicable.

#### 5. PERIOD / DURATION OF PROJECT / ASSIGNMENT

**Five (05) Year Period.**

#### 6. PAYMENT:

The WRC will be invoiced according to the amount of services rendered payment will be affected 30 days from the date of the invoice.

#### 7. STANDARD CONDITIONS OF THE TENDER

- i. **Bidders must complete SBD 4, SBD 6.1;**
- ii. Bidders must also submit a **valid and original tax clearance certificate**; and a **valid B-BBEE certificate** (original or certified copy) to the WRC offices PRIOR to the closing date, if the WRC is not already in possession of these certificates;
- iii. WRC Supplier application form must be completed and signed (copy attached)
- iv. It is the responsibility of prospective bidders to ensure that all bid documents are submitted before the closing time and date of the tender;
- v. The WRC reserves the right to award or not to award this contract;
- vi. The WRC will enter into a formal contract with one successful bidder;
- vii. The WRC reserves the right to terminate the contract should the performance of the service provider be unsatisfactory;
- viii. Bids received after closing time and date will be classified as **LATE** and will **NOT** be considered;
- ix. Although adequate thought has been given in the drafting of this document, errors may occur which the WRC will not be responsible for;
- x. Any change of information provided in the tender document that may affect delivery of the service should be brought to the WRC's attention as soon as possible. Failure to comply with this may result in the contract being terminated;
- xi. Service providers presenting information intentionally incorrectly or fraudulently will be disqualified;
- xii. Service providers who have been declared insolvent and wish to do business with the WRC must have been rehabilitated and provide the necessary proof thereof;
- xiii. The WRC reserves the right to award, cancel or partially award this contract.
- xiv. The National Treasury General Conditions of Contract will be applicable to this tender (available on the National Treasury website);



- xv. Bidders must complete and attach all relevant standard bid document;
- xvi. All prices quoted must be VAT inclusive;
- xvii. Only those bidders, who have met the minimum functional criteria, as stipulated above, may be invited to present their proposal as required. Please note that bidders, who may be invited for presentations, may have their technical scores re-evaluated.
- xviii. For those bidders who have met the minimum functional criteria, as stipulated above, the WRC has the right to visit the business premises to verify the information provided in the tender documents; please note that bidders who may have their premises inspected, may have their technical scores re-evaluated.
- xix. Short-listed companies could be invited to present and discuss their proposals.
- xx. A service level agreement will be entered into between the WRC and the successful respondent.

## 8. CLOSING DATE AND TIME

- ☐ The closing date for the RFQ is the **19 October 2022 @ 24h00.**
- ☐ Quotations should be sent to [quotations@wrc.org.za](mailto:quotations@wrc.org.za) to reach the WRC before 24h00pm on the closing date and time.

## 9. ENQUIRIES

- ☐ For any technical enquiries and commercial enquiries please contact: the WRC Supply Chain Unit at [quotations@wrc.org.za](mailto:quotations@wrc.org.za)