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INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR PROFESSIONAL SERVICES

TENDER ADVERT DATE: **09 March 2023**

A non-compulsory briefing meeting with representatives of the employer will take place via Ms. Teams virtual platform link ([Click here to join the meeting](#)) **Meeting Date – 15 March 2023 Time: 10H00 – 11H00.**

TENDER CLOSING DATE: **13 April 2023**

TENDER CLOSING TIME: **12H00**

BID DESCRIPTION: RFP – PROVISION OF INTEGRATED EMPLOYEE ASSISTANCE/WELLNESS PROGRAMME SERVICES FOR JDA FOR A PERIOD OF 36 MONTHS

BID NUMBER: **JDACOP/EAP/001/2023**

BID DOCUMENTS MUST BE DEPOSITED IN THE BID BOX SITUATED AT:

Offices of the Johannesburg Development Agency, 3 Helen Joseph Street (formerly known as President Street), The Bus Factory, Newtown, Johannesburg, 2000.

Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.

NB: NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE (see definition below)

¹ * MSCM Regulations: “in the service of the state” means to be –

- (a) a member of –
 - (i) any municipal council;
 - (ii) any provincial legislature; or
 - (iii) the national Assembly or the national Council of provinces;
- (b) a member of the board of directors of any municipal entity;
- (c) an official of any municipality or municipal entity;
- (d) an employee of 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);
- (e) a member of the accounting authority of any national or provincial public entity; or
- (f) an employee of Parliament or a provincial legislature.

ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:

Département :	Procurément	Contact Person :	Ms Tsakani Mabunda
Tel :	011 688 7800	Fax : 011 688 7899	E-mail: tmabunda@jda.org.za

ANY REQUIRIES REGARDING THE PROJECT MAY BE DIRECTED TO:

Department:	Human Resources	Contact Person:	Mrs. Kelebogile Lekgetho
Tel:	011 688 7800	Fax: 011 688 7899	E-mail: KLekgetho@jda.org.za

PLEASE NOTE: TENDERS MUST BE SUBMITTED ON THE TENDER DOCUMENTATION ISSUED. TENDER DOCUMENTATION MUST NOT BE REPRODUCED OR REARRANGED. ANY ADDITIONAL INFORMATION MUST BE SUBMITTED AS A SEPARATE ATTACHMENT TO THE TENDER DOCUMENT FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED.

OFFER

**THE FOLLOWING PARTICULARS MUST BE FURNISHED
(FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED)**

NAME OF BIDDER

BID DESCRIPTION

.....

.....

BID NUMBER

POSTAL ADDRESS

.....

STREET ADDRESS

.....

CONTACT PERSON

TELEPHONE NUMBER CODE NUMBER

CELLPHONE NUMBER

FACSIMILE NUMBER CODE NUMBER

E-MAIL ADDRESS

COMPANY REGISTRATION NUMBER

NATIONAL CENTRAL SUPPLIER DATABASE NUMBER

VAT REGISTRATION NUMBER

TAX VERIFICATION PIN NUMBER

TOTAL BID PRICE..... excluding Value Added Tax

TOTAL BID PRICE in words

.....

.....

..... excluding Value Added Tax

SIGNATURE OF BIDDER

CAPACITY UNDER WHICH THIS BID IS SIGNED

DATE

Tender validity = 120 days

To all our stakeholder

RE: The channels of reporting fraudulent and Corrupt Activities

The City of Johannesburg has a **zero-tolerance approach to Fraud, Theft, Corruption, Maladministration, and Collusion** by suppliers with employees. To reinforce this commitment, more channels have been added to report any Fraudulent and Corrupt activities.

Instances of corporate fraud and misconduct remain a constant threat to service delivery. The City of Johannesburg took a resolution to adopt strategic interventions aimed at combatting fraud and corruption. The City took a decision to centralized the reporting of fraudulent and corrupt activities through the establishment of an independent fraud hotline which is managed by independent service providers.

All people doing business with the Johannesburg Development Agency are encouraged to report any corrupt or illegal practice.

Employees are encouraged to report fraud, waste or other concerns suggestive of dishonest or illegal activities.

Anyone can report fraudulent and corrupt activities through one of the following channels:

- Toll free number.....0800 002 587
- Toll free Fax0800 007 788
- SMS (charged @ R1.50).....32840
- Email Address:.....anticorruption@tip-offs.com
- Web site:.....www.tip-off.com
- Free post:.....Free post, KZN 138, Umhlanga, 4320



Let's join hands to take up the Fight against Fraud and Corruption in our society.

JOHANNESBURG DEVELOPMENT AGENCY

BID DESCRIPTION: RFP – PROVISION OF INTEGRATED
EMPLOYEE ASSISTANCE/WELLNESS PROGRAMME
SERVICES FOR JDA FOR A PERIOD OF 36 MONTHS

BID NUMBER: JDACOP/EAP/001/2023

Tender advertisement: 09 March 2023

Closing date and time: 13 April 2023

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COPY OF ADVERT

TENDERING PROCEDURES

Tender Notice and Invitation to Tender

BID DESCRIPTION: RFP – PROVISION OF INTEGRATED EMPLOYEE ASSISTANCE/WELLNESS PROGRAMME SERVICES FOR JDA FOR A PERIOD OF 36 MONTHS

BID NUMBER: JDACOP/EAP/001/2023

The Johannesburg Development Agency is requesting proposals from experienced Employee Assistance/Wellness Programme service providers to render integrated EAP services to the JDA for a staff complement of around 96 employees and their loved ones for a period of 36 months.

Queries relating to procurement matters may be addressed to Ms Tsakani Mabunda at tel: (011) 688 7800; or e-mail: tmabunda@jda.org.za

Technical queries or queries relating to the project may be addressed to Mrs. Kelebogile Lekgetho at tel: (011) 688 7800; or n e-mail: KLekgetho@jda.org.za

Documents may be downloaded from the JDA's website as follows: www.jda.org.za as well as on www.etenders.gov.za from **09 March 2023**. Tenders must only be submitted on the tender documentation that is downloaded from the stipulated websites. The retyping of the tender document is not permitted.

A non-compulsory briefing meeting with representatives of the employer will take place via Ms. Team virtual platform and the link will be provided on the actual tender document. **Meeting Date – 15 March 2023 Time: 10H00 – 11H00.**

The **closing time and date** for receipt of tenders is **12H00pm on 13 April 2023**.

Telegraphic, telephonic, telex, facsimile, e-mailed, and late tenders will not be accepted.

The physical address for the delivery of tender documents is Johannesburg Development Agency, Ground Floor Reception Area, The Bus Factory, 3 Helen Joseph Street (formerly President Street), Newtown 2000.

Requirements for sealing, addressing, delivery, opening and assessment of tenders are stated in the Tender Data.

The JDA's selection of qualifying tenders will be at the JDA's sole discretion and will be final. The JDA does not bind itself to accept any tender and correspondence will be entered into with successful tenderer.

“WE ENCOURAGE ALL PEOPLE DOING BUSINESS WITH US TO REPORT ANY CORRUPT OR ILLEGAL PRACTICE, USING THE ANTI-FRAUD HOTLINE NUMBER: 0800 002 587”

1. Introduction

The wellbeing of JDA employees is very important in ensuring that they are fully engaged and function at their optimum levels while fulfilling the many roles they fill in their lives. To assist with supporting our organisation and employees' wide range of wellness needs the JDA is requesting proposals from experienced Employee Assistance/Wellness Programme service providers to render integrated EAP services to the JDA for a staff complement of around 96 employees and their loved ones.

2. Purpose

The Purpose of this Document is to define the Scope of the EAP services required for the Employee Wellness programme of the JDA.

3. Objective

The JDA is requesting proposals from experienced Employee Assistance/Wellness Programme service providers to render integrated EAP services to the JDA for a staff complement of around 96 employees and their loved ones.

This benefit will contribute to a happy, engaged and a productive workforce.

4. Project Deliverables

The EAP services must be comprehensive and address the complete integrated workplace wellness programme. The EAP services should be easily accessible to employees and their loved ones, cost effective as well as of the best quality, the service provider must implement best wellness management practices in all aspects of the service delivery. The following deliverables are expected but not limited to:

- Provide confidential professional counselling support services both telephonically and face to face consultations with registered professionals;
- 24/7 direct, unlimited and confidential first line access and assistance to multilingual, toll-free psychological, relationship, life management and general counselling service;
- Face-to-face counselling sessions with registered counsellors, psychologists, wellness practitioners for each person who are assisted via the EAP system at a time and place that is most suitable to them;
- Comprehensive trauma response services;
- Managerial consultancy and referral options supporting managers in their respective roles within the JDA in dealing with absenteeism, performance and/or wellness related challenges;
- Provide health and wellness education through up-to-date monthly newsletters with guidance on trending health issues and training programmes;
- Quarterly and Annual reports on all key utilisation aspects of the EAP;
- Advise and recommendations where necessary with regards to any interventions relating to prevention measures or wellness improvements where concerns are raised;
- Coordinate and manage the JDAs Wellness Day biannually (twice a year);
- Conduct and provide assistance on Occupational Health assessment when required;
- Provide medical assistance support in the event of any medical intervention required such as chronic illness management;
- Provide financial management/wellness education and counselling when required;
- Provide legal advice when required;

The proposed EAP service provider must comply with the following:

- Have over 10 years of experience in the Workplace Health industry.
- Their network of counsellors and psychologists must be registered with the relevant Health Professional bodies as regulated.

- They should have a national footprint and/or network to ensure service is available to our employees and their loved ones at any time and place closer to their homes, place of work and/or anywhere when trauma support is needed.

5. The requirements

- 5.1. Proof of end-to-end EAP Programme implementations that they have completed.
- 5.2. Completed similar projects in the past 5 years with contactable reference letters in a letter head of the client, with a bid description, the duration of the project, the value of project and must be signed.
- 5.3. A detailed proposal and approach should be attached.
- 5.4 Must demonstrate the functionality of the complete solution with a presentation to us.

6. PRICING TABLE

Detailed below is information upon which costs must be based on.

Service	Basis of around 96 employees	Estimated Annual Costs (The annual costs must include the annual increases)			Total Years excluding VAT
		Year 1 (excl.V AT)	Year 2 (excl.V AT)	Year 3 (excl.VAT)	
		Rate			3
Core Program Management fees	Per employee x12 months				
Monthly usage report	Per report x12 months				
4 Quarterly and 1 Annual Reports (Total of 5 reports per annum)	Per report				
Wellness Days x2 per annum	Per event Per employee				
Sub Total					
Total excluding VAT					R

Bidders are to transfer the total amount correctly and be carried to the 'Offer' Page.

Failure to price as required will result in the tender being disqualified for non-compliance.

Appointment

The Johannesburg Development Agency is requesting proposals from experienced Employee Assistance/Wellness Programme service providers to render integrated EAP services to the JDA for a staff complement of around 96 employees and their loved ones for a period of 36 months.

The bidders are to ensure that they have all the relevant skills (proposed key personnel), experience and capacity to deliver the scope of work within the required timelines.

6.1. **Notes**

- 6.1.1 Bidders are to ensure that they have adequate resources to undertake the work under stringent timeframes.

- 6.1.2 Bidders are required to ensure that project team leader has the leadership capacity and capability to independently handle and manage project challenges (if any) in order to ensure successful completion of the project. The team proposed must be the one executing the services.
- 6.1.3 The JDA reserves the right to ask tenderers to replace any member/s of the proposed team if they do not meet the JDA requirements.
- 6.1.4 Successful tenderers will be required to sign the JDA's Standard Form Agreement and appendices.
- 6.1.5 Bidders must note that they may be required to present final report to the JDA's Executive Corporate manager and the Senior Manager: HC Operations if deemed necessary.
- 6.1.6 Bidders must note that they will be required to provide weekly project progress reports to the Executive Corporate manager and the Senior Manager: HC Operations.
- 6.1.7 Bidders must also note that all documents and information gathered are to remain the property of JDA and should not be used or shared with any external party without prior consent by the Executive Corporate manager and the Senior Manager: HC Operations.
- 6.1.8 The bidder is to provide the indicated / required resources and corresponding cost that he/she proposes for the delivery on the project requirements.
- 6.1.9 The bidder is expected to include on the pricing for all the reasonable activities, and disbursements fees.

A bidder who fails to complete the Offer page and pricing table in full will be disqualified

Notes

- Any fee proposals must include for anticipated and standard disbursements which are to include typing, reproduction, copying, binding of documents, telephonic/electronic and facsimile communication, courier, local travel and any other cost for the client costs.
- The payment of fees will not exceed the apportionment amount per appointment letter.
- Tenderers must ensure that the final fee proposals on the pricing table is correctly carried over to the "OFFER" page.
- The amounts recorded on the offer page will be deemed to be the tendered amounts.
- Disputes shall be settled in good faith between parties in an effort to resolve the dispute. If the dispute is not resolved at that meeting, the Parties will attempt to settle it by mediation.

7. PROPOSAL CONTENT

The bidder's submission must provide the JDA with sufficient information to enable JDA to make a sound and fair evaluation of the proposal.

It must clearly indicate the **relevant** previous experience, capability, and capacity of the bidding entity to undertake the project.

The proposal should **use the same item numbers as below**. **The proposal must be clearly marked and indexed.**

The following minimum documentation must be provided:

7.1 THE “OFFER” PAGE MUST BE COMPLETED IN FULL AND SIGNED. Any bidder who fails to do so will be disqualified.

7.2 Tenderers are required to submit a fee proposal based on the requirements set out in item 6 above and to ensure that the final TOTAL FEE IS CORRECTLY TRANSFERRED TO THE “OFFER” PAGE. Any bidder who fails to do so will be disqualified.

7.3 A valid / or certified BBBEE status level verification certificate substantiating the bidding entities BBBEE rating. Only certificates issued by verification agencies accredited by the South African Accreditation System (SANAS), or by registered auditors approved by the Independent Regulatory Board of Auditors (IRBA) will be accepted.

FAILURE TO SUBMIT A BBBEE STATUS LEVEL CERTIFICATE WILL RESULT IN THE BIDDER SCORING ZERO (0) POINTS FOR BBBEE.

OR

An EME must submit a sworn affidavit confirming the following:

- **Annual turnover revenue of R10 million or less; and**
- **Level of black ownership**

Any misrepresentation in terms of the above constitutes a criminal offence as set out in the B-BBEE Act as amended.

7.4 Company registration documents

7.5 A copy of the bidding entity's current municipal rates account in the name of the bidding entity or alternatively in the names of the directors / partners of the bidding entity.

7.6 Audited financial statements for the past three financial years.

7.7 Details of directors / partners / members and shareholders with certified copies of their identity documents.

7.8 The bidding entity's certificates of membership/s to industry bodies.

7.9 A detailed approach and methodology statement wherein the approach to be followed in each stage of the assessment process is outlined with clear identification of the deliverables.

7.10 This section should show the tenderer understands of the process, input required towards the completion of the required services and the expected outputs and outcomes.

7.11 The forms A to G annexed hereto, must be scrutinized, completed in full, signed and submitted together with your proposal.

7.12 A corporate brochure alternatively a brief summary of the entity's background.

7.13 Provide information on the individuals who will be assigned to **this project (NOT the entire company)**. The following **must** be addressed:

- Organogram of the project team
- Role/s and responsibility/ies of the project team on this project

- Relevant qualifications, professional registration (where required) and attach proof thereof
- Number of years of relevant experience in EAP Programme projects implementation services as a company
- Detailed CV's for each member of the team noting their specific relevant project experience [qualifications, role, membership certificates where applicable, Numbers of years of experience]
- Individual memberships to professional associations (where required) and attach proof hereof if available.
- **The appointed bidder must bring to the JDA the same team proposed as per this tender document and failure to do so will result in the cancellation of the contract.**

7.14 A schedule of completed contracts of a **similar** nature to this project i.e. EAP Programme projects implementation. The following details **must** be included on the schedule:

- Description of the project
- Type of Service rendered
- Name of employer / client and their representative's contact details
- Date of completion
- Letter of reference on the client's letterhead or with the client's company stamp that confirms project scope of work, service rendered and project value.
- Contact details of referees.

7.15 Tenderers are to submit 1 x original proposal and 1 x copy.

FAILURE TO COMPLY WITH THE REQUIREMENTS IN ITEM 8 WILL RESULT IN TENDERERS BEING DISQUALIFIED NON-COMPLIANCE AND NEGATIVELY SCORED ON TECHNICAL ASSESSMENT.

7.16 Note for joint ventures

- **EACH** party to a joint venture is to submit the requisite documents and / or information as requested in item 6 – 8.
- An Agreement or Heads of Terms recording the arrangement between the parties to the consortium / joint venture is to be submitted.
- A lead consultant is to be appointed and noted in the submission.
- A trust, consortium or joint venture will qualify for points for their BBBEE status level as an unincorporated entity, provided that the entity submits their consolidated BBBEE scorecard as if they were a group structure and that such a consolidated BBBEE scorecard is prepared for every separate tender.

Failure to comply with these conditions may invalidate your offer.

8. ASSESSMENT CRITERIA

Submissions will be evaluated on the criteria to follow:

- Compliance
- Technical
- Price / BBBEE
- Risk Tolerance

8.1 Compliance

Bidders will be disqualified for the following cases:

- If any of its directors are listed on the National Treasury register of defaulters.
- A bidder who during the last five years has failed to perform satisfactorily on previous contracts with the JDA or any other organ of state after written notice was given to that bidder that performance was unsatisfactory. Or the contract was terminated.
- Who did not complete, in full, the tender offer page and pricing table (i.e., priced, all registration numbers provided and signed).
- Who failed to price as required i.e as stipulated in item 6 here in.
- Who's tender document has been completed in pencil.
- Who's tender document has been faxed and or e-mailed.
- Who directors are/is in the employment of the state.
- Bidders whose tender document have been received after the closing date and time.
- Who did not comply with any other requirement as set out in the tender specifications
- No award will be made to any bidder who is not registered on the National Treasury Central Supplier Database (CSD).

8.2 Technical

The technical assessment is based on the criteria set out below namely:

- (a) Key Returnable Documents,
- (b) Capability of the Proposed Key Team Members (i.e., experience, qualifications,),
- (c) Company experience (i.e., EAP Programme projects, and references) and
- (d) Contactable references in line with item (c) above.

Note that duplication of resources/personnel on the designations indicated in the criteria will result in zero points being awarded for one criterion.

Tenderers will have to submit compliant documents and score a minimum number of points in the technical evaluation in order to be considered further in the evaluation process.

Total points = 184 and service providers are required to score a minimum (60%) which translate to of 110.4 points for them to proceed to the next phase of evaluation (price and bbbee).

"A" Key Returnable document	Total Points	Criteria	Description of Criteria	Points
A	14	Points will be allocated for including the following:	Key returnable documents to be submitted	
		Current municipal account		n/a
		Valid BBBEE status level certificate		n/a
		Company registration documents		n/a
		CTS letter from SARS		n/a
		Valid Professional Indemnity Insurance R 2m		n/a

"A" Key Returnable document	Total Points	Criteria	Description of Criteria	Points
		Certified copies of directors / partners identity documents		n/a
		3 years of audited financial statements		n/a
		Company profile and background in Business continuity management review		n/a
		Detailed methodology for the project		n/a
		Annexure A to G completed in full and signed		14

"B" Capability of the Proposed Key Team Members	Total Points	Criteria	Description of Criteria	Points
Capability of the Proposed Key Team Members	60	<p>1. Project Lead/Account Manager: with minimum of 10 years of experience in the Workplace EAP Programme management implementation with an undergraduate qualification in similar and relevant environment and certified qualification to be attached.</p> <p><i>(The organogram on annexure "G" should clearly indicate the team leader)</i></p>	<p>If any of the following information is not provided, zero points will be awarded:</p> <ul style="list-style-type: none"> • Detailed CV of the project team leader. • The project leader track record • Contactable references • Information provided is not in line with the organogram 	30
		<p>2. Health/Wellness/EAP Specialist: with minimum of 5 years in Workplace EAP Programme implementation and an undergraduate qualification in similar and relevant environment and certified qualification to be attached.</p> <p><i>(The organogram on annexure "G" should clearly indicate the team leader)</i></p>	<p>If any of the following information is not provided, zero points will be awarded:</p> <ul style="list-style-type: none"> • Detailed CV of the Health/Wellness/EAP Specialist • The Health/Wellness/EAP Specialist track record • Contactable references 	30

			<ul style="list-style-type: none"> Information provided is not in line with the organogram 	
“C” Company experience	Total Points	Criteria	Description of Criteria	Points
C1 EAP Programme Management company existence experience	30	10 years company existence experience in EAP Programme Management of the integrated wellness EAP	Points will be allocated for listing current or previous experience information for EAP Programme Management. Provide start date and end date where applicable	30
C2 EAP Programme Management Projects (Complete Annexure D)	50	Five (5) or more EAP Programme Management Projects on provision of the integrated wellness EAP projects completed and conducted in the past five (5) years.		50
		Three (3) to Four (4) EAP Programme Management Projects on provision of the integrated wellness EAP projects completed and conducted in the past five (5) years.		30
		One (1) to Two (2) EAP Programme Management Projects on provision of the integrated wellness EAP projects completed and conducted in the past five (5) years.		10
“D” Contactable references	Total Points	Criteria	Description of Criteria	Points
	30	Five (5) or more satisfactory references letters on experience specifically on provision of EAP Programme Management implementation projects completed and conducted in the past five (5) years.	<ul style="list-style-type: none"> Description of Criteria If any of the following information is not provided, zero points will be awarded: Supporting contactable references matching the above company experience with the letter head and/or official stamp of the organisation as per the project list above “C” 	30
		Three (3) to Four (4) satisfactory references letters experience on provision of EAP Programme Management implementation projects completed and conducted in the past five (5) years.		20
		One (1) to Two (2) satisfactory references letters experience on provision of EAP Programme Management implementation		10

		projects completed and conducted in the past five (5) years.		
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8.3 Price and Empowerment

Having completed a technical evaluation, the procedure for the evaluation of technically qualifying tenders is Method 2 (Price and Preferences). The Preference Point System assigns a score to each tenderer based on the tender price and on the tenderer's BBBEE status.

These scores are combined to determine an overall score for the tender. The tender with the highest score will be considered for acceptance.

The Preference Point System will be applied as follows:

- For tenders up to R50 million
 - 80 points are assigned to price
 - Up to 20 points are assigned to BBBEE status per the table under item 8.
- Points scored will be rounded off to the nearest 2 decimal places

8.3.1 Points awarded for BBBEE status level

Points will be awarded for empowerment (BBBEE), in accordance with the Preferential Procurement Regulations 2017 published in Government Gazette No. 40553 dated 20 January 2017. The table overleaf is applicable in this regard:

B-BBEE Status Level Of Contributor	Number of Points
	Tenders up to R50 million
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-Compliant contributor	0

Notes:

- 8.3.1.1 "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 9.3 of the Broad-Based Black Economic Empowerment Act (Act No.53 of 2003).
- 8.3.1.2 Tenderers must submit their original and valid B-BBEE status level verification certificate substantiating their B-BBEE rating. Certificates issued by either verification agencies accredited by the South African Accreditation System (SANAS) or by registered auditors approved by the Independent Regulatory Board for Auditors (IRBA) are acceptable. **FAILURE TO SUBMIT A BBBEE STATUS LEVEL CERTIFICATE WILL RESULT IN THE BIDDER SCORING ZERO (0) POINTS FOR BBBEE.**
- 8.3.1.3 An EME must submit a sworn affidavit confirming the following:

- Annual Turnover Revenue of R10 million or less; and
- Level of Black ownership
- Any misrepresentation in terms of bullet point above constitutes a criminal offence as set out in the B-BBEE Act as amended.

- 8.3.1.4 The submission of such certificates must comply with the requirements of instructions and guidelines issued by the National Treasury and are in accordance with notices published by the Department of Trade and Industry in the Government Gazette.
- 8.3.1.5 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 8.3.1.6 A trust, 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 tender.
- 8.3.1.7 A person will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub-contracting 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 tenderer qualifies for.
- 8.3.1.8 A person awarded a contract will not be permitted to 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.
- 8.3.1.9 No tender will be awarded to a bidder whose tax matters are not in order with SARS.
- 8.3.1.10 No tender will be awarded to a bidder who is not registered on CSD.

8.3.2 Formula for scoring tender price

The following formula will be used to calculate the points for price.

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

Where

P_s = Points scored for comparative price of tender under consideration

P_t = Comparative price of tender under consideration

P_{\min} = Comparative price of lowest acceptable tender

X = Points assigned to price

8.3.3 The total preference points for a tender are calculated with the formula

$$PP = P_s + P_{bee} \text{ Where}$$

PP is the total number of preference points scored by the tenderer

P_s is the points scored for the comparative price of the tenderer, and

P_{bee} is the number of points awarded to the tenderer based on his certified B-BBEE status level

8.4 RISK TOLERANCE

The JDA has adopted a Risk Tolerance Framework (RTF) which enjoins the JDA to consider its risk exposure to contractors / service providers in terms of the number of contracts awarded to a single contractor / service provider in a particular year.

In terms of the Risk Tolerance Framework, the JDA determines the risk exposure as excessive in instances where the value of the contracts for individual professional service providers (e.g. project managers / engineers / quantity surveyors / consultants) is either :

**The greater of R8 million or four contracts / projects in the current financial year or
The greater of R12 million or six contracts / projects over two financial years (current year and previous financial year)**

And in instances where the value of contracts for multi-disciplinary professional service providers (e.g. more than one discipline / service is provided by the same bidder) is either:

**The greater of R12 million or six contracts / projects in the current financial year or
The greater of R20 million or nine contracts / projects over two financial years (current year and previous financial year)**

A risk analysis shall be undertaken on the bidder with the highest number of points obtained, to determine whether the tenderer does not exceed the JDA's risk framework criteria as stated above. In other words, whether it falls within the ambit of the Risk Tolerance Framework as acceptable.

JDA reserves the right to award a contract to a bidder who has exceeded the threshold as stated above

9. CLOSING DATE, TIME, AND VENUE FOR SUBMISSIONS

The completed tender document shall be placed in a sealed envelope.

The words: “RFP – PROVISION OF INTEGRATED EMPLOYEE ASSISTANCE/WELLNESS PROGRAMME SERVICES FOR JDA FOR A PERIOD OF 36 MONTHS”. must be written / typed clearly on the envelope.

The physical address for the delivery of tender documents is Johannesburg Development Agency, Ground Floor Reception Area, The Bus Factory, 3 Helen Joseph Street (formerly President Street), Newtown 2000.

The tender closing date and time **13 APRIL 2023 at 12H00**. There will be a public opening of tenders.

NO LATE / E-MAILED / TELEPHONIC / FAXED / POSTAL TENDERS WILL BE ACCEPTED OR CONSIDERED.

The Johannesburg Development Agency’s selection of qualifying tenders shall be in the Johannesburg Development Agency’s sole discretion and shall be final. The Johannesburg Development Agency does not bind itself to accept any particular tender and no correspondence will be entered into.

Unsuccessful bidders will have the opportunity to query the award or decision within fourteen (14) calendar days from the day of notification.

The tender offer validity period for this tender is 120 days.

Queries can be addressed in writing to:
Mrs. Kelebogile Lekgetho
E-mail address: KLekgetho@jda.org.za

ANNEXURE A: BUSINESS DECLARATION

Tender/RFP Number :

Tender/RFP Description :

Name of Company :

Contact Person :

Postal Address :

.....

Physical Address :

.....

Telephone Number :

Fax Number :

Cell Number :

E-mail Address :

Company/enterprise Income

Tax Reference Number :
(Insert personal income tax number if a one person business and personal income tax numbers of all partners if a partnership)

VAT Registration Number :

Company Registration Number :

1. Type of firm

- Partnership
- One person business/sole trader
- Close corporation
- Public company
- Private company

(Tick one box)

2. Principal business activities

.....
.....
3. Total number of years company has been in business:

4. Detail all trade associations/professional bodies in which you have membership
.....
.....

5. Did the firm exist under a previous name?

- Yes
- No

(Tick one box)

If yes, what was its previous name?

6. How many permanent staff members are employed by the firm:

Full Time :

Part Time :

7. In the case of a firm which renders services for different disciplines, how many permanent staff members are employed by the firm in the discipline for which you are tendering:

Full Time :

Part Time :

8. What is the enterprise's annual turnover for the last two years and what is the estimated turnover of current commitments from 1 July 2019 to 30 June 2021 (excl. VAT):

R Year

R Year

R Year

9. List all contracts which your company is engaged in and have not yet completed:

CONTRACT DESCRIPTION (INCLUDE TYPE OF SERVICE)	LOCATION	COMPANY/ EMPLOYER	PROJECT VALUE	ESTIMATED FEES	EXPECTED COMPLETION (MONTH & YEAR)
---	----------	----------------------	------------------	-------------------	--

10. Banking details

I/We hereby request and authorise you to pay any amounts which may accrue to me/us to the credit of my/our account with the mentioned bank.

I/We understand that the credit transfers hereby authorised will be processed by computer through a system known as the “ACB Electronic Fund Transfer Service” and

I/We also understand that no additional advice of payment will be provided by my/our bank, but details of each payment will be printed on my/our bank statement or any accompanying voucher.

This authority may be cancelled by me/us giving **30 days** notice in writing.

- BANK** :
- BRANCH** :
- BRANCH CODE** :
- ACCOUNT NUMBER** :
- ACCOUNT HOLDER** :
- TYPE OF ACCOUNT** :
- CONTACT PERSON** :
- CONTACT NUMBER** :

PLEASE INCLUDE ORIGINAL SIGNED AND STAMPED LETTER FROM THE BANK CONFIRMING THE COMPANY'S BANKING DETAILS, PHOTOSTAT COPIES AND LETTERS BEARING ELECTRONIC SIGNATURES WILL NOT BE ACCEPTABLE.

The undersigned, who warrants that he/she is duly authorised to do so on behalf of the company, affirms that the information furnished in response to this request for proposal is true and correct:

SIGNATURE :

NAME IN FULL :

CAPACITY :

DULY AUTHORIZED TO SIGN ON BEHALF OF:

DATE :

COMPANY STAMP

ANNEXURE B: DECLARATION OF INTEREST

- 1. No bid will be accepted from persons in the service of the state*.

- 2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.

3. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

3.1 Full Name:

3.2 Identity Number:

3.3 Position occupied in the company (director, trustees, shareholder**)

3.4 Company Registration Number:

3.5 Tax Reference Number:

3.6 VAT Registration Number:

3.7 The names of all directors / trustees / shareholders / members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

3.8 Are you presently in the service of the state* **YES / NO**

If yes, furnish particulars

.....
.....

3.9 Have you been in the service of the state for the past twelve months? **YES / NO**

If yes, furnish particulars

.....
.....

3.10 Do you, have any relationship (family, friend, other) with persons in the service of the state and who may be

involved with the evaluation and or adjudication of this bid?

YES / NO

If yes, furnish particulars

.....
.....

3.11 Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

If yes, furnish particulars

.....
.....

3.12 Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**

If yes, furnish particulars

.....
.....

3.13 Are any spouse, child or parent of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**

If yes, furnish particulars

.....
.....

3.14 Do you or any of the directors, trustees, managers, principle shareholders or stakeholders of this company have any interest in any other related companies or businesses whether or not they are bidding for this contract? **YES / NO**

If yes, furnish particulars

.....
.....

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

FULL NAME	IDENTITY NUMBER	STATE EMPLOYEE NUMBER

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Position

.....
Name of Bidder

.....
Date

- * MSCM Regulations: “in the service of the state” means to be –
 - (a) a member of –
 - (i) any municipal council;
 - (ii) any provincial legislature; or
 - (iii) the national Assembly or the national Council of provinces;
 - (b) a member of the board of directors of any municipal entity;
 - (c) an official of any municipality or municipal entity;
 - (d) an employee of any national or provincial department, national or provincial public entity or constitutional institution with in the meaning of the Public Finance Management Act, 1999 (Act No.1 of 1999);
 - (e) a member of the accounting authority of any national or provincial public entity; or
 - (f) an employee of Parliament or a provincial legislature.

** “Stakeholder” means a person who owns shares in the company and is actively involved in the management of the company or business and exercises control over the company.

ANNEXURE C: DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Municipal Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by municipalities and municipal entities in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be rejected if that bidder, or any of its directors have:
 - a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
 - b. been convicted for fraud or corruption during the past five years;
 - c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
 - d. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004).
- 4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's database as a company or person prohibited from doing business with the public sector? (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? (To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
Item	Question	Yes	No

4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		

4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.7.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Position

.....
Name of Bidder

.....
Date

ANNEXURE D: PARTICULARS OF CONTRACTS AWARDED BY AN ORGAN OF STATE* DURING THE LAST 5 YEARS**

(In the event of insufficient space, kindly attach documentation)

EMPLOYER	EAP Programme Management	VALUE OF WORK	YEAR COMPLETED

ANNEXURE D: PARTICULARS OF CONTRACTS AWARDED NOT BY AN ORGAN OF STATE* DURING THE LAST 5 YEARS**

(In the event of insufficient space, kindly attach documentation)

EMPLOYER	EAP Programme Management	VALUE OF WORK	YEAR COMPLETED

ANNEXURE D : PARTICULARS OF CONTRACTS AWARDED BY AN ORGAN OF STATE*** DURING THE LAST 5 YEARS cont.

EMPLOYER	NATURE OF WORK	VALUE OF WORK	YEAR COMPLETED

*** Organ of State means-

- ◆ a) a national or provincial department;
- ◆ b) a municipality;
- ◆ c) a constitutional institution defined in the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- ◆ d) Parliament;
- ◆ e) a provincial legislature;
- ◆ f) any other institution or category of institutions included in the definition of “organ of state” in section 239 of the Constitution and recognised by the [Minister](#) by notice in the *Government Gazette* as an institution or category of institutions to which [this Act](#) applies

.....
 Signature
 (of person authorised to sign on behalf of the organisation)

.....
 Position

.....
 Name of Bidder

.....
 Date

ANNEXURE E: CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

RFP – PROVISION OF INTEGRATED EMPLOYEE ASSISTANCE/WELLNESS PROGRAMME SERVICES FOR JDA FOR A PERIOD OF 36 MONTHS

in response to the invitation for the bid made by:

Johannesburg Development Agency

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 consortium will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraph 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

.....
Position

.....
Name of Bidder

.....
Date

ANNEXURE F: DECLARATION ON STATE OF MUNICIPAL ACCOUNTS

A Any bid will be rejected if:

Any municipal rates and taxes or municipal service charges owed by the bidder or any of the directors to the municipality or a municipal entity, or to any other municipality or municipal entity, are in arrears for more than three months.

B Bid Information

- i. Name of bidder:
- ii. Registration Number:
- iii. Municipality where business is situated
- iv. Municipal account number for rates:
- v. Municipal account number for water and electricity:
- vi. Names of all directors, their ID numbers and municipal account number.
 - 1.
 - 2.
 - 3.
 - 4.
 - 5.
 - 6.
 - 7.

C Documents to be attached.

- i. A copy of municipal account mentioned in B (iv) & (v) (Not older than 3 months)
- ii. A copy of municipal accounts of all directors mentioned in B(vi) (Not older than 3 months)
- iii. Proof of directors

I/We declare that the abovementioned information is true and correct and that the following documents are attached to this form:

Signature

Date

ANNEXURE G : ORGANOGRAM THIS ANNEXURE IS CRITICAL FOR THE TECHNICAL EVALUATION AS DETAILED UNDER ITEM 8.2 HEREIN

The tenderer shall list below the key personnel proposed for this project in the discipline and designation being tendered for as per 8.2 above herein.

TABLE 1: PROJECT LEAD/ ACCOUNT MANAGER

Key Resource Information	
Designation:	Project Lead/ Account Manager
Name & Surname	
Nationality	
ID / Passport Number	
First Qualification Name Incl. Date of Qualification and Institution	
Highest Qualification Name Incl. Date of Qualification and Institution	
Years Experience after initial relevant Qualification	
Professional Registration Body / Institution	
Date of Professional Registration	
Professional Registration Number	

TABLE 2: HEALTH/WELLNESS/EAP Specialist

Key Resource Information	
Designation:	Health/Wellness/EAP Specialist
Name & Surname	
Nationality	
ID / Passport Number	
First Qualification Name Incl. Date of Qualification and Institution	
Highest Qualification Name Incl. Date of Qualification and Institution	

Years Experience after initial relevant Qualification	
Professional Registration Body / Institution	
Date of Professional Registration	
Professional Registration Number	