



**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>0024807/18-19</b>   | CLOSING DATE: | <b>25 JULY 2018</b>  | CLOSING TIME:  | <b>11H00</b> |
| DESCRIPTION OF GOODS/SERVICES   | APPOINTMENT OF A SERVICE PROVIDER TO ASSIST THE WRC FOR DEVELOPMENT AND IMPLEMENTATION OF AN EMPLOYEE HEALTH AND WELLNESS ASSISTANCE PROGRAMME FOR A PERIOD OF TWENTY-FOUR (24) MONTHS |               |  |  |              |
| <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>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>   |  |               | <b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>                           |  |              |
| CONTACT PERSON  | <b>Nhlanhla Chauke</b>   |               | CONTACT PERSON   | <b>Nhlanhla Chauke</b>   |              |
| TELEPHONE NUMBER  | <b>012-761 9300</b>  |               | TELEPHONE NUMBER   | <b>012-761 9300</b>  |              |
| E-MAIL ADDRESS  | <b>nhlanhlac@wrc.org.za</b>  |               | E-MAIL ADDRESS   | <b>nhlanhlac@wrc.org.za</b>  |              |
| <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]<br><input type="checkbox"/> Yes <input type="checkbox"/> No   |               | B-BBEE STATUS LEVEL SWORN AFFIDAVIT                                      | [TICK APPLICABLE BOX]<br><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<br>[IF YES ENCLOSE PROOF]   |               | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[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 |
| <b>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.</b> |  |



## 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 PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT. |
| 1.4. <b>THE SUCCESSFUL BIDDER 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 WWW.SARS.GOV.ZA.   |
| 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 – SBD3.1, SBD4, SBD6.1 (where applicable), SBD8 and SBD9 should be fully completed and signed by the supplier/service provider). WRC reserves the right not to accept/eliminate/disqualify a quotation not accompanied by the completed prescribed SBD forms.

**SBD 3.1  
PRICING SCHEDULE – FIRM PRICES  
(PURCHASES)**

**NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED**

**IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT**

|                       |                           |
|-----------------------|---------------------------|
| NAME OF BIDDER: ..... | RFQ/P NO:.....            |
| CLOSING DATE:.....    | CLOSING TIME <b>11:00</b> |

OFFER TO BE VALID FOR **90** DAYS FROM THE CLOSING DATE OF RFQ/P.

**DESCRIPTION OF GOODS OR SERVICES:** .....

| Item No. | QTY. | DESCRIPTION | PRICE (excl. VAT) |
|----------|------|-------------|-------------------|
|          |      |             |                   |
|          |      |             |                   |
|          |      |             |                   |



- Brand and model .....
- Country of origin .....
- Does offer comply with specification? \*YES/NO
- If not to specification, indicate deviation(s) .....
- Period required for delivery .....
- Delivery basis (all delivery costs must be included in the bid price) .....  
\*Delivery: Firm/not firm

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

**NB: This form is attached for you to furnish but please provide us with a Firm Price. You are also permitted to attach your own pricing schedule.**

### **SBD 3.1 PRICING SCHEDULE – FIRM PRICES (PURCHASES)**

**NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED**

**IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT**

NAME OF BIDDER: ..... RFQ/P NO.:.....  
 CLOSING DATE:..... CLOSING TIME **11:00**

OFFER TO BE VALID FOR **90** DAYS FROM THE CLOSING DATE OF RFQ/P.

**DESCRIPTION OF GOODS OR SERVICES:**

.....  
 .....

| Item No. | QTY. | DESCRIPTION | PRICE (excl. VAT) |
|----------|------|-------------|-------------------|
|          |      |             |                   |
|          |      |             |                   |
|          |      |             |                   |



|  |   |       |                          |
|--|---|-------|--------------------------|
|  |   |       |                          |
| -  | Brand and model   | ..... |                          |
| -  | Country of origin   | ..... |                          |
| -  | Does offer comply with specification?                                 |       | *YES/NO                  |
| -  | If not to specification, indicate deviation(s)                        | ..... |                          |
| -  | Period required for delivery  | ..... |                          |
|  |   |       | *Delivery: Firm/not firm |
| -  | Delivery basis (all delivery costs must be included in the bid price) | ..... |                          |
| <p>Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.</p> <p><b>NB: This form is attached for you to furnish but please provide us with a Firm Price. You are also permitted to attach your own pricing schedule.</b></p> |   |       |                          |



## SBD 4 - DECLARATION OF INTEREST WITH GOVERNMENT

Any legal person, including persons employed by the State (meaning 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); any municipality or municipal entity; provincial legislature; national Assembly or the national Council of provinces; or Parliament), 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 an advertised competitive Bid, a limited Bid, a proposal or written price quotation). 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/s person who is/are 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.

In order to give effect to the above, the following questionnaire must be completed and submitted with this Bid:

|  |  |
|--|--|
|  | Full Name of Bidder or his/her representative  |
|  | Identity Number:   |
|  | Position occupied in the Company (director, trustee, shareholder, member):           |
|  | Registration number of company, enterprise, close corporation, partnership agreement |



|  |          |
|--|----------|
| Tax Reference Number:  |          |
| VAT Registration Number:   |          |
| 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 a separate schedule including the following questions: |          |
| Schedule attached with the above details for all directors/members/shareholders  |          |
| Are you or any person connected with the Bidder presently employed by the State?<br>If so, furnish the following particulars in an attached schedule   | YES / NO |
| 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:   |          |
| 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 |
| If Yes, did you attach proof of such authority to the Bid document?  |          |
| If No, furnish reasons for non-submission of such proof as an attached schedule  |          |
| (Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the Bid.)  |          |
| Did you or your spouse or any of the company's directors/ trustees /shareholders /members or their spouses conduct business with the State including any business  | YES / NO |





|   |          |
|---|----------|
| units of the National Research Foundation in the previous twelve months?  |          |
| If so, furnish particulars as an attached schedule:   |          |
| 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 |
| If so, furnish particulars as an attached schedule.   |          |
| Do you or any of the directors/ trustees/ shareholders/ members of the company have any interest in any other related companies whether or not they are bidding for this contract?                              | YES / NO |
| If so, furnish particulars as an attached schedule:   |          |

## 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);
- 1.2.



1.2.1. The value of this bid is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the ..... preference point system shall be applicable; or  
 1.2.2. The 80/20 preference point system will be applicable to this

- 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:

|  | <b>POINTS</b> |
|--|---------------|
| <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 PREFERENCE POINT SYSTEMS



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

80/20

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

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 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 | <input type="checkbox"/> | NO | <input type="checkbox"/> |
|-----|--------------------------|----|--------------------------|

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 | <input type="checkbox"/> | NO | <input type="checkbox"/> |
|-----|--------------------------|----|--------------------------|



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

| <b>Designated Group: An EME or QSE which is at least 51% owned by:</b>   | <b>EME</b><br>√ | <b>QSE</b><br>√ |
|--|-----------------|-----------------|
| <b>Black people</b>  |                 |                 |
| <b>Black people who are youth</b>  |                 |                 |
| <b>Black people who are women</b>  |                 |                 |
| <b>Black people with disabilities</b>                                    |                 |                 |
| <b>Black people living in rural or underdeveloped areas or townships</b> |                 |                 |
| <b>Cooperative owned by black people</b>                                 |                 |                 |
| <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.

### **SBD 8 - DECLARATION OF BIDDER'S PAST SCM PRACTICES**

|   |          |
|---|----------|
| Is the Bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? If Yes, furnish particulars as an attached schedule:                    | YES / NO |
| 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)? If Yes, furnish particulars as an attached schedule:                       | YES / NO |
| 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? If Yes, furnish particulars as an attached schedule:                         | YES / NO |
| Was any contract between the Bidder and any Government entity terminated during the past five years because of failure to perform on or comply with the contract? If Yes, furnish particulars as an attached schedule:  | YES / NO |
| The Database of Restricted Suppliers and Register for Tender Defaulters resides on the National Treasury's website ( <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> ) and can be accessed by clicking on its link at the bottom of the home page. |          |





## **SBD 9: CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting this Bid in response to the invitation for the Bid made by the National Research Foundation, do hereby make the following statements that I certify to be true and complete in every respect:

I have read and I understand the contents of this Certificate;

I understand that the Bid will be disqualified if this Certificate is found not to be true and complete in every respect;

I am authorised by the Bidder to sign this Certificate, and to submit the Bid, on behalf of the Bidder;

Each person whose signature appears on the Bid has been authorised by the Bidder to determine the terms of, and to sign, the Bid on behalf of the Bidder;

For the purposes of this Certificate and the accompanying Bid, I understand that the word “competitor” shall include any individual or organisation, 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

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 (meaning an association of persons for combining their expertise, property, capital, efforts, skill, and knowledge in an activity for the execution of the bid) will not be construed as collusive bidding.

In particular, without limiting the generality of paragraphs 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.

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.

The terms of this 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 the bid or to the signing of the contract.

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



**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 3.1</b>            | <u><b>YES / NO</b></u> |
| <b>SBD 4</b>              | <u><b>YES / NO</b></u> |
| <b>SBD 6.1</b>            | <u><b>YES / NO</b></u> |
| <b>SBD 8</b>              | <u><b>YES / NO</b></u> |
| <b>SBD 9</b>              | <u><b>YES / NO</b></u> |
| Completed by:             |                        |
| Signature:                |                        |
| Company Name:             |                        |
| Contact Telephone Number: |                        |
| Date:                     |                        |
|                           |                        |
| Company Stamp:            |                        |



## PART D

### TERMS OF REFERENCE / SCOPE OF WORK / SPECIFICATION (to be attached or included under part D)

#### 1. Purpose

The WRC requires to appoint a service provider to develop and implement an employee wellness programme. The Programme will play a vital role in supporting the physical, psychological and social wellbeing of employees, thereby assisting employees to perform optimally for a period of twenty four (24) months.

The service provider will be responsible for developing and implementing an Employee Health and Wellness Programme. The Employee Health and Wellness Programme needs to be one that will empower our employees to take control of their wellbeing, reducing problems at home and work and facilitating higher levels of productivity. The service provider needs to have Employee Assistance programmes as one of their core offerings.

#### 2. Scope of work

Kindly indicate compliance with the below specification

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

The number of the employees are eighty (80)

- EWP policy development and review
- Clinical and professional, multilingual support line services for employees and their immediate family
- Face to face counselling
- Critical incident management (onsite trauma and crisis intervention)
- Managerial Consultancy and referral services



- On-line health and wellness programme (awareness and management)
- Telephonic Health and medical support services
- Life management service (financial, legal and family care advise)
- Employee absence management
- Dedicated client relationship manager for management and administration
- Marketing and promotion
- Monitoring and evaluation

**Qualifications and Expertise Required**

- Minimum of 5 years rendering EWP services
- Demonstration of capacity and experience
- A list of previous and current companies to whom services were or are rendered
- At least 3 written references from recent clients with work done

**3. EVALUATION CRITERIA**

The RFQ will be evaluated in accordance with the PPPFA 80/20 principle against the following Criteria.

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

| <b>SCORE</b> | <b>DESCRIPTION</b> |
|--------------|--------------------|
| <b>1</b>     | Poor               |
| <b>2</b>     | Average            |
| <b>3</b>     | Good               |
| <b>4</b>     | Very Good          |
| <b>5</b>     | Excellent          |

**3.1 EVALUATION CRITERIA**



The RFQ will be evaluated in accordance with the PPPFA **80/20** principle against the following Criteria:

|                              |  |
|------------------------------|--|
| <b>Mandatory requirement</b> | <ul style="list-style-type: none"> <li><b>Proof of membership to professional body of the Employee Assistance Programme Association and registration of counsellors with professional bodies e.g Employee Assistance Professional Association (EAPA) International and South Africa</b></li> </ul> |
|------------------------------|--|

| <b>No</b>            | <b>Element</b>  | <b>WEIGHTING</b> |
|----------------------|---|------------------|
| 1                    | Experience in undertaking similar work minimum of 5 years' experience (Attach relevant Company Profile)<br><br>(Scoring is in the sliding scale of 1 to 5.) | 30               |
| 2                    | Capacity (short profiles of the team that will be handling the work)<br><br>(Scoring is in the sliding scale of 1 to 5.)                                    | 20               |
| 3                    | Proposed concept of operation for the Employee Wellness Programme<br><br>(in line with scope)<br><br>(Scoring is in the sliding scale of 1 to 5.)           | 30               |
| 4                    | Reference letters<br><br>(Attach list of contactable references and Letters at least three (3) letters  | 20               |
| <b>FUNCTIONALITY</b> |   | <b>100%</b>      |



In order for the proposal to be considered for the next level of evaluation **Minimum score required on functionality: 80%** must be obtained.

The closing date for the RFQ is the **25<sup>th</sup> of July 2018**