



Appointment of a service provider for the provision of Employee Wellness Programme (EWP) for the National Housing Finance Corporation.

RFP CM/02/2019

Bid closing date: 04 March 2019 at 11h00 am

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1. INTRODUCTION

The NHFC has broadened its mandate and reviewed its business and operating model as it seeks to deepen its reach, scope and coverage to the lowest end of the housing market. In recognition of the improving and fast changing socio-economic environment in South Africa, the NHFC is seeking to reposition itself and align itself with the changing social and economic landscape, and it must, in order to remain relevant to the development finance improve its impact. To this end, the organisation sought to fundamentally transform the way it conducts business.

The National Housing Finance Corporation sees itself as a progressive organisation that strives to provide its employees with a cutting edge wellness programme that will create a productive workforce that feels good about itself and the corporation as a whole. To this end the NHFC seeks the services of a company that will provide a comprehensive Employee Wellness Programme for the NHFC and its employees.

2. PURPOSE

The purpose of this document is to table the tender specification for the appointment of a service provider to render wellness programmes to the NHFC.

3. TERMS OF APPOINTMENT

The Contract in respect of the assignment will be signed between the Service Provider and NHFC for a period of three (3) years.

4. BACKGROUND

The National Housing Finance Corporation SOC Limited (NHFC) was established by the National Department of Human Settlements as a Development Finance Institution (DFI) in 1996, with the principle mandate of broadening access to affordable housing finance for the low- and middle-income households. The company is a Schedule 3A DFI of the National Department of Human Settlements.

NHFC is a registered public company and has been granted the necessary exemption in terms of the Banks Act. As a national public entity, the NHFC adheres to the regulatory framework of the Public Finance Management Act (PFMA) of 1999.

The corporation organogram consists of the following departments, and the total number of employees is approximately 119 in the following functional areas

- Corporate Strategy (including Corporate Communications);
- Lending;
- Credit;
- Corporate Support Services which incorporates Legal, Enterprise wide Risk, Information Technology and Compliance divisions);
- Finance (including Treasury and Supply Chain Management);
- Company Secretariat;
- Office of the CEO;
- Human Resources; and
- Programme Management

The target market of the NHFC is the low-to-middle income housing market which typically includes households who earn between R3 500 and R15 000 per month which the NHFC provides wholesale funding through various institutions such as social housing institutions, non-banking retail intermediaries and privately owned property investors. The NHFC mandate requires the company to make housing and housing finance accessible and affordable to facilitate this objective. This is done through:

- providing wholesale funding to housing development projects for ownership, social housing and private rental, including inner cities, and for incremental housing purposes;
- partnering with banks and other non-banking retail financial intermediaries to increase their sustained lending and innovation in the target market served; and
- leveraging private sector funding for the sustainable development of Human Settlements.

More specifically, NHFC's strategic priorities are to:

- Expand housing finance activities, through the effective provision of housing finance solutions, enabling low-to-middle income households to have the choice of renting, owning or incrementally building to meet their housing needs;
- Facilitate increased and sustained lending by financial institutions to the affordable housing market;
- Mobilise funding into the human settlements space on a sustainable basis, in partnership with a broad range of institutions;
- Conduct the business activities of the NHFC in an ethical manner that ensures the continued economic sustainability of the NHFC, while promoting sustainable social and environmental development; and

- Stimulate the low-to-middle income housing sector by providing robust, relevant and timely research and market analysis to practitioners and housing customers.

5. SCOPE OF WORK

The aim of the Employee Wellness Programme is to improve the quality of life of all employees and assist to alleviate the impact of everyday work, personal and family challenges

The Service Provider must assist the NHFC to provide a healthier, more productive workforce-life balance, in so doing minimise their occupational health risk whilst meeting all legislative requirements. The provider is expected to produce a detailed quarterly report, which will in particular indicate the delivery of the following outcomes or processes:-

- Executive Wellness Programme that includes a comprehensive medical and lifestyle assessment, monitoring and appropriate intervention, including two wellness programmes per year.
- A comprehensive Employee Assistance Programme (EAP) that will cater for physical and mental needs of employees that are as a result of work, personal and family related challenges.
- HIV and other chronic disease consultation and advice.
- Offer integrate Financial Management, Legal advice, Counselling and Training into the EAP to ensure that social problems around money management do not manifest into high levels of debt, poor concentration, absenteeism, family violence and drug and alcohol abuse.

6. EXPERTISE AND CAPACITY

The key criteria to be considered for the suitability of the service provider include:-

The appointed service provider will have to:

- Have exceptional expertise in Employee Wellness Programme and consulting of more than three years;
- Specialise in Employee Assistance Programme Management;
- To have carried out several similar exercises elsewhere; and
- Have enough capacity to carry out the assignment in terms of the agreed contractual obligations.

NB: Proposals should be able to not only provide what is mentioned above but also indicate areas of importance pertinent to the process.

7. CONTENT OF PROPOSAL

7.1 THE TECHNICAL PROPOSAL MUST INCLUDE THE FOLLOWING:

- Company Profile and relevant experience Full and comprehensive description of similar work undertaken in the past 3 years;
- Composition of team: Abridged CV of each member of the team (qualifications, experience, expertise etc.)
- The Service Provider is to demonstrate their understanding and interpretation of the terms of reference.
- The Service Provider is to provide the proposed methodology and approach to be used in keeping with the scope of the work to achieve the purpose and objectives.

7.2 FINANCIAL PROPOSAL

The Financial Proposal must follow the following framework:

- Total Price for the Project, inclusive of VAT;
- Project Cost Calculation (itemised), derived from the work content.

8. BID EVALUATION CRITERIA

The proposal will be evaluated in terms of the Preferential Procurement Policy Framework Act 2000 and the Preferential Procurement Regulation of 2017.

The evaluation of bid responses will be conducted in three (3) phase as follows:

Phase 1: Eligibility / Pre-Qualification criteria

Bidders will be evaluated according to pre-qualification requirements which include the submission of mandatory information or documentation. Bidders that fail to meet the pre-qualification requirements of the bid will not be considered further for evaluation i.e. Phase 2.

The bidder must meet the following pre-qualification requirements:

- a) The bidder must be registered with the EAPSA and should submit valid proof of registration.
- b) Bidders are required to submit a copy tax clearance certificate (TCC) and their unique personal identification number (pin) issued by SARS to enable the NHFC to view the bidders tax status.
- c) The bidder must be registered on the National Treasury's Central Supplier Database at the time of submitting the proposal.

- d) Bidders must submit proof of Company Registration documents
- e) Certified copy of BBBEE Certificate or a sworn affidavit (Separate document)
- f) Submission of the following Signed and Completed Standard Bid Documents (SBD) Forms:
 - SBD 1: Invitation to Bid
 - Pricing Schedule
 - SBD 4: Declaration of Interest
 - SBD 6.1 Preference Points Claim Form in terms of preferential procurement
 - SBD 7.2 Contract Form – Rendering of Services
 - SBD 8: Declaration of Bidder’s Past SCM Practices
 - SBD 9: Certificate of Independent Bid Determination
 - General Conditions of Contract (GCC)

Failure to comply with the above pre-qualification requirements will lead to the disqualification of the bid.

Phase 2: Technical / Functional Evaluation

The minimum qualifying score for functionality is 70% (70 points). All bids that fail to achieve the minimum qualifying score on functionality shall not be considered for further evaluation on Price and BEE.

Category	Criteria	Sub-category	Weighting
1.	Experience and Expertise of Key Personnel		20
	• Detailed CV’s of key employees (Psychologist and social workers) with at least 5 years’ experience in employee wellness consultation services.	15	
	• Management structure and project team track record	5	
2.	Stability and Track Record		20
	• Organizational track record (Proof of company success rate in employee wellness programme)	10	
	• Financial and operational stability (audited annual financial statement)	5	
	• Submission of at least five (5) signed reference letters from companies where similar service has been conducted.	5	
3.	Approach and Methodology		50
	• Understanding of terms of reference & brief	15	
	• Applicability of strategic methodology and approach	35	

Category	Criteria	Sub-category	Weighting
4.	Value Proposition and Skills Transfer		10
	• Skills transfer plan	10	
	TOTAL		100

Phase 3: Price and BBEE evaluation

All bids that achieve the minimum qualifying score of 70% (70 points) for Functionality, (acceptable bids) will be evaluated further in terms of the 80/20 preference point system.

The preference point's claim is in terms of the Preferential Procurement Regulations 2017.

B-BBEE Status Level of Contributor	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

9. COMMERCIAL OBLIGATIONS

This section of the document outlines the general commercial process and obligations of the service provider.

9.1 CONTRACTING

A contract will be concluded between NHFC and the successful service provider which will incorporate the following:

- The letter of acceptance to the successful bidder
- The original tender documents;
- The proposal of the successful service provider, and

- Terms and conditions as stipulated above and general contract terms and conditions.

9.2 MATERIAL RIGHTS

The product of this project will be confidential information, and will be the property of the NHFC and no disclosure of information to other parties will be made without prior written approval of the NHFC.

9.3 RULES OF BIDDING

- The NHFC reserves the right to amend or cancel this RFP at any time, at its sole discretion;
- Tax Clearance certificates valid on the closing date of this bid must be submitted
- The NHFC is not bound to accept any of the proposals submitted, and reserves the right to call for best and final offers from the short-listed bidders before final selection;
- The NHFC reserves the right to call for interviews with short-listed bidders before final selection;
- The NHFC reserves the right to negotiate price and other elements of the contract with the preferred bidder;
- The NHFC would award a contract to a bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the NHFC.
- An eligible Bidder, if requested, must be prepared to present evidence of experience, ability, service facilities, and financial standing necessary to satisfactorily meet the requirements set forth or implied in this proposal;
- The NHFC reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid process. The bidder hereby gives consent to the NHFC to conduct background checks on the bidding entity and any of its directors / partners / trustees / shareholders /members/employees. The NHFC reserves the right to consider the information arising from such background check as part of the tender evaluation process.

- NHFC reserves the right to award a contract in part, to reject any and all quotations in whole or in part, to waive technical defects, irregularities and omissions, at its sole discretion;
- The successful bidder (s) may be required to sign a Service Level Agreement (SLA), in terms of which the service provider's performance will be measured and managed.
- Late submissions will not be considered.

10. PROPOSAL COMPLIANCE REQUIREMENTS

This section contains the requirements for Proposal Compliance; all submissions must consist of a Technical and a Financial Proposal as explained below:

10.1.1 Copies

Three hard copies and a soft copy (CD/USB) must be submitted in a sealed envelope, appropriately addressed.

10.1.2 Submission Address

Proposal, endorsed with **RFP CM/02/19**, must be hand delivered to:

NHFC Tender Box
The Isle of Houghton
Old Trafford 3, 1st Floor
11 Boundary Road
Houghton
Johannesburg

Attention Mrs. Pumza Nsukwini

10.1.3 Submission Date

The Proposal (technical and financial) must reach the NHFC **by 04 March 2019, 11h00am.**

10.1.4 **Proposal Cost**

The cost of compiling the Proposal (technical and financial) is and remains the prospective service provider's own cost and will not be paid for by NHFC.

10.1.5 **Contacts**

The contact person for information pertaining to the RFP proposal is Mrs. Pumza Nsukwini, telephone numbers 011-644 9800 fax number 011 484 0204 and e-mail pumzan@nhfc.co.za.