



## Request for Proposals (RFP) for

# The Provision of Medical Scheme Brokerage Services to the CSIR

**RFP No. 3277/09/04/2019**

Date of Issue	26 March 2019	
Briefing Session	03 April 2019 Time: 10:00 to 12:00 Venue: CSIR Pretoria, Building 22, Central Station	
Closing Date	09 April 2019	
Place	Tender box, CSIR Main Reception, Gate 3 (North Gate)	
Enquiries	Strategic Procurement Unit	E-mail: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a>
CSIR business hours	08h00 – 16h30	
Category	Professional Services	

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## **SECTION A – TECHNICAL INFORMATION**

### **1 INTRODUCTION**

The Council for Scientific and Industrial Research (CSIR) is one of the leading scientific research and technology development organisations in Africa. In partnership with national and international research and technology institutions, CSIR undertakes directed and multidisciplinary research and technology innovation that contributes to the improvement of the quality of life of South Africans. The CSIR's main site is in Pretoria while it is represented in other provinces of South Africa through regional offices.

### **2 BACKGROUND**

The purpose of this Request for Proposal (RFP) is to engage with experts in the medical scheme industry who are interested in the supply of Medical Scheme Brokerage Services to the CSIR, as specified herein.

### **3 INVITATION FOR PROPOSAL**

Proposals are hereby invited from suitably qualified service providers to offer Medical Scheme Brokerage Services to the CSIR for a period of three (3) years.

### **4 PROPOSAL SPECIFICATION**

All proposals are to be submitted in a format specified in this enquiry. However, tenderers are welcome to submit additional / alternative proposals over and above the originally specified format, as defined in the Scope below.

### **5 SCOPE OF WORK**

- 5.1 The CSIR requires advisory services of a Medical Scheme Brokerage who will need to provide support to the CSIR by aligning its service offering to the CSIR health care and wellness requirements
- 5.2 The Medical Scheme Broker will be required to understand the CSIR business and environment, understand (within legal prescripts) the state of the CSIR employees' health and wellness and their needs as well as be required to contribute towards developing and implementing the CSIR employee benefits strategy over the next three years. The

successful bidder will be expected to conduct risk analyses and health care assessments for interested employees, in order to weigh up the most appropriate medical scheme options, based on the employee's budget and specific requirements.

- 5.3 The Medical Schemes Act 131 of 1998 (The Act) and the subsequent regulations to the Act have changed the way in which medical schemes conduct their business in South Africa, with the introduction of open enrolment and prescribed minimum benefits. It is important that the CSIR anticipate any changes in this regard to be able to structure its strategy accordingly. In addition, National Health Insurance has been a topical issue and the successful Medical Scheme Broker would be expected to deal directly with the Registrar of Medical Schemes regarding this initiative.
- 5.4 The Medical Scheme Broker should be able to inform the CSIR timeously of the timing of this impending change and also the applicable financial implications thereof.
- 5.5 The Medical Scheme Broker must identify global trends that affect service delivery of medical schemes and forecast the effect this might have on the health care industry as a whole and indicate what impact this will have on the CSIR.
- 5.6 The Medical Scheme Broker must be able to provide the required services at the following regions/centres.

<b>Regional Office</b>	<b>Est. employee count</b>
Head Office - Pretoria	2 129
Johannesburg	111
Cape Town (Rosebank and Stellenbosch)	182
KZN (Durban)	62
PE	19
<b>Total</b>	<b>2 503</b>

- 5.7 The Medical Scheme Broker should be able to provide a professional independent medical Scheme review with no vested interest in any one medical scheme or medical scheme administrator.
- 5.8 The medical Scheme environment and regulations are extremely complex and requires expert knowledge in order to manage health care at the CSIR effectively. Therefore, the CSIR will use an outsourced service provider to assist with strategic medical scheme advice

and administration. The Medical Scheme Broker must at all times adhere to the principles of best practice and must offer the best choice of medical scheme benefit options.

- 5.9 The Medical Scheme Broker will be required to appoint a dedicated Consultant to the CSIR who will provide integrated medical scheme advisory services. The Broker must be aligned to the CSIR Health and Wellness Strategy and provide relevant and effective support structures to all CSIR employees and management.
- 5.10 The CSIR current Medical Scheme Provider is currently Bestmed. The organisation is of the opinion that with appropriate advice from the Medical Scheme Broker the introduction of a second medical scheme could be negotiated should this be required. Shortlisting of appropriate medical schemes, underwriting negotiations and terms and conditions of membership acceptances, will be responsibility of the Medical Scheme Broker.
- 5.11 The Medical Scheme Broker will be required to:
- by law hold an accreditation from the Council for Medical Schemes (CMS) and a license from the Financial Services Board (FSB).
  - provide a service to CSIR employees, advising them of medical scheme options and health plans. Continuously evaluate the effectiveness and relevance of the Employer selected medical scheme(s).
  - Schedule monthly meetings with the relevant CSIR stakeholders to discuss medical scheme matters and advise on ways to enhance service delivery and any current matters/issues.
  - Monitor the effectiveness and service delivery of the administrative support that is provided to the CSIR by the Medical Scheme/s through their dedicated Administrator;
  - Work with the relevant CSIR stakeholders and the appointed Employee Assistance Programme (EAP) Service Provider to formulate, develop and implement an effective Wellness and Medical Scheme Strategy.

**Further responsibilities of the Medical Scheme Broker are set out as follows:**

**5.12 Medical Assessments and Comparisons**

The Medical Scheme Broker will provide an annual benchmarking report that consists of a comprehensive analysis of the medical Scheme providers / environment to be used in an objective analysis and or assessment of the CSIR's medical scheme providers. The report should consider the following:

- Industry trend analysis and updates;
- Legislative review and updates;
- Solvency and financial status of the CSIR's preferred medical Scheme providers;
- Contribution increase expectations;
- Scheme comparisons (e.g. value for money);
- Benefit offering (membership size and growth);
- Risk analysis;
- Comparative pricing reports;
- Membership by scheme;
- Scheme performance (member size and growth);
- Low cost medical scheme options available; modelling of cost impact; and
- Provide recommendations based on the analysis.

#### 5.13 **CSIR Analysis and assessment**

The Medical Scheme Broker will provide a report consisting of a comprehensive analysis of the value offering to our employees and confirm that our employees are not financially exposed to high costs of medical care. This analysis should consist of:

- Employee demographics (Age, gender and family size);
- Employee membership movements;
- Employee plan selection;
- Employee and employer contribution and claims analysis;
- Employee utilisation (contributions vs. claims); and
- Year on year trend analysis.

#### 5.14 **Employee Assistance**

The Medical Scheme Broker to the CSIR will be required to introduce a number of processes and tools that will assist employees with the selection of most suitable plan options. The Health Care provider will be required to assist with in-house awareness campaigns to inform employees on medical Scheme related matters.

The designated consultant assigned by the Medical Scheme Broker to the CSIR should

be able to:

- Analyse an employee's current situation and be able to provide better benefit options based on their current health profile as employee's health care needs may change;
- Provide efficient and effective communication and education critical to the perception an employee has of the medical scheme;
- Introduce and improve claims collection and administration delivery structures within the CSIR to ensure prompt receipt by the administrator;
- Report on and monitor the claims processing efficiencies of the medical scheme administrator with regard to both initial and escalated / problematic claims;
- Provide weekly / monthly face to face consultations where employees are assisted with;
  - Solving their problematic claims by submitting the query to the medical scheme, monitoring the progress and provide feedback to the employee;
  - Be able to analyse an employee's health history and on this basis be able to recommend the most appropriate medical Scheme plan option;
  - Educate employees on how to utilise their medical Scheme more effectively;
  - The consultant must be able to negotiate on behalf of the CSIR employee if there is a dispute about a specific claim. The Medical Scheme broker will be required to be at the CSIR offices provide face to face sessions with its employees. The frequency of these sessions will be negotiated with the employee benefits office.

#### **5.15 Assistance to the CSIR Employee Benefits Team**

- Provide support with management of Service Level Agreements with medical schemes;
- Provide a dedicated consultant / administrator who will assist the CSIR Employee benefits team with medical scheme queries;
- Provide guidance and training to our Human Capital Administrators on the different administrative processes;
- Provide monthly progress reports on each aspect of administration (e.g. new membership, addition of dependent, cancelation of membership, membership continuation etc.);
- Medical Scheme Broker to follow up with employees if required to ensure relevant

requirements are met for resolution of any queries;

- Present year end sessions on annual basis to employees at each of the regional centres;
- Present medical scheme education at employee orientation sessions;
- Provide support and advisory service for the incapacity-due-to-ill-health process;
- Provide guidance and support with employee health care communication strategy and annual year planner linked to hot topics; and
- Provide support for any on-line system.

#### **5.16 Employee Wellness Programme**

The Medical Scheme Broker will be required to participate in the design and implementation of the CSIR Wellness Programme and events during the course of the year together with the CSIR appointed EAP service provider. The CSIR welcomes new and industry relevant wellness strategies and will expect the Medical Scheme Broker to keep the organisation up to date with trends and peer practices.

#### **5.17 Other value-adding services**

- The broker must demonstrate a thorough understanding of COID Act, and how they will assist the CSIR HR team in the management of this. The broker should also indicate any costs associated with this service.
- The Medical Scheme Broker is welcome to include any ancillary services unique to them that will enhance the overall service offering.

### **6 PREQUALIFICATION CRITERIA TO ADVANCE CERTAIN GROUPS**

- 6.1 Only service providers having a level 1, 2 or 3 B-BBEE status contributor status will be considered for this tender. Original copies or certified copies of valid B-BBEE Certificates or Sworn Affidavit must be submitted.
- 6.2 Service providers that fail to meet the pre-qualification criteria will not be considered.
- 6.3 Proof of accreditation with the Council for Medical Schemes

### **7 FUNCTIONAL EVALUATION CRITERIA**

The evaluation of the functional / technical detail of the proposal will be based on the following criteria:



No.	Evaluation criteria	Weighted score
1.	<b>Broker's experience in providing medical aid brokerage services</b> The bidder must submit a proposal clearly indicating their knowledge of the industry, applicable legislation and how they have contributed to the industry	10
2.	<b>References</b> Broker's demonstrated expertise in negotiating medical aid on behalf of clients of similar size as the CSIR. Indication of number of corporate clients.	5
3.	<b>Infrastructure</b> Details of information technology system which the Healthcare Consultants use to provide the above services; Call Centre; Healthcare Website; Electronic tools / communication as a minimum.	10
4.	<b>National Footprint</b> The bidder must provide evidence of their capability to service CSIR regionally	5
5.	<b>Reporting</b> The bidder must provide samples of reports that cover the required scope	20
6.	<b>Value add services</b> The bidder is expected to provide in detail their additional value-add offering	10
7.	<b>Methodology and approach</b> The bidder must provide ideas, strategic initiatives and innovative approach on how the account will be managed. The approach clearly indicate how the bidder will deliver to the required scope. The approach must also include how the bidder will integrate with CSIR's EAP programme and EAP service provider.	40
	<b>TOTAL</b>	<b>100</b>

7.1 Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of 70 % and less than 50 % on any of the individual criteria will be eliminated from further evaluation.

7.2 Shortlisted bidders will be invited for presentations and shall be notified thereof no later than four (4) days before the actual presentation date.

## **8 ELIMINATION CRITERIA**

Proposals will be eliminated under the following conditions:

- Submission after the deadline;
- Failure to meet the pre-qualification criteria;
- Non Accreditation and registration with the Council for Medical Schemes;
- Non Registration with the Financial Services Board; and
- Proposals submitted at incorrect location.

## **9 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE REGISTRATION**

Before any negotiations will start with the winning bidder it will be required from the winning bidder to:

- be registered on National Treasury's Central Supplier Database (CSD). Registrations can be completed online at: [www.csd.gov.za](http://www.csd.gov.za);
- provide the CSIR of their CSD registration number; and
- provide the CSIR with a certified copy of their B-BBEE certificate. If no certificate can be provided, no points will be scored during the evaluation process. (RSA suppliers only).

## SECTION B – TERMS AND CONDITIONS

### 10 VENUE FOR PROPOSAL SUBMISSION

All proposals must be submitted at:

- **CSIR GATE 03 - Main Reception Area** (in the **Tender box**) at the following address  
Council for Scientific and Industrial Research (CSIR)  
Meiring Naudé Road  
Brummeria  
Pretoria

***CSIR IS A NATIONAL KEY POINT AND A FORM OF IDENTIFICATION IS REQUIRED TO ACCESS THE PREMISES***

### 11 TENDER PROGRAMME

The tender program, as currently envisaged, incorporates the following key dates:

- Issue of tender documents: 26 March 2019
- Briefing session 03 April 2019
- Last date for submission of queries: 05 April 2019
- Closing / submission Date: 09 April 2019

### 12 SUBMISSION OF PROPOSALS

12.1 All proposals are to be sealed. No open proposals will be accepted.

12.2 All proposals are to be clearly marked with the RFP number and the name of the tenderer on the outside of the main package. Proposals must consist of two parts, each of which is placed in a separate sealed package clearly marked:

**PART 1:** Technical Proposal

**PART 2:** All pricing will be equally evaluated based on Regulation 23(2) published in terms of the Medical Schemes Act (Refer to 16 Pricing Proposal) and B-BBEE Documentation. No quotations are required for this RFP unless your company would like to quote us below the regulated standard tariff.

- 12.3 Proposals submitted by companies must be signed by a person or persons duly authorised.
- 12.4 The CSIR will award the contract to qualified tenderer(s) whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution and B-BBEE.

### **13 DEADLINE FOR SUBMISSION**

Proposals shall be submitted at the address mentioned above no later than the closing date of 09 April 2019 during CSIR's business hours. The CSIR business hours are between 08h00 and 16h30.

Where a proposal is not received by the CSIR by the due date and stipulated place, it will be regarded as a late tender. Late tenders will not be considered.

### **14 AWARDING OF TENDERS**

- 14.1 Awarding of tenders will be published on the National Treasury e-tender portal. No regret letters will be sent out.

### **15 EVALUATION PROCESS**

#### **15.1 Evaluation of proposals**

All proposals will be evaluated by an evaluation team for functionality and B-BBEE. Based on the results of the evaluation process and upon successful negotiations, the CSIR will approve the awarding of the contract to successful tenderers.

A two-phase evaluation process will be followed.

- The first phase includes evaluation of **elimination** and **functionality criteria**.
- The second phase includes evaluation of **B-BBEE** status.

Only proposals that achieved the specified minimum qualification scores for functionality will be evaluated further using the preference points system.

### **16 PRICING PROPOSAL**

- 16.1 No pricing proposals submissions are required for this RFP
- 16.2 All payments to successful bidders will be based on Regulation 23(2) published in terms of the Medical Schemes Act, which effectively reads as follows:
- 16.2.1 "Subject to sub-regulation (3), the maximum amount payable to a broker by a medical scheme in respect of the introduction of a member to a medical scheme by that broker and the provision of ongoing service or advice to that member, shall not exceed –

- 16.2.2 R 94.77, plus value added tax (vat) per month, or such other monthly amount as the Minister shall determine annually in the Government Gazette, taking into consideration the rate of normal inflation: or
- 16.2.3 3% plus value added tax (VAT) of the contributions payable in respect of that member, whichever is lesser”

## **17 VALIDITY PERIOD OF PROPOSAL**

Each **proposal** shall be valid for a minimum period of three (3) months calculated from the closing date.

## **18 APPOINTMENT OF SERVICE PROVIDER**

- 18.1 The contract will be awarded to the tenderer who scores the highest total number of points during the evaluation process, except where the law permits otherwise.
- 18.2 Appointment as a successful service provider shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement CSIR reserves the right to appoint an alternative supplier.
- 18.3 Awarding of contracts will be announced on the National Treasury website and no regret letters will be sent to unsuccessful bidders.

## **19 ENQUIRIES AND CONTACT WITH THE CSIR**

Any enquiry regarding this RFP shall be submitted in writing to CSIR at [tender@csir.co.za](mailto:tender@csir.co.za) with **“RFP No. 3277/09/04/2019 - The Provision of Medical Scheme Brokerage Services to the CSIR”** as the subject.

Any other contact with CSIR personnel involved in this tender is not permitted during the RFP process other than as required through existing service arrangements or as requested by the CSIR as part of the RFP process.

## **20 MEDIUM OF COMMUNICATION**

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

## 21 COST OF PROPOSAL

Tenderers are expected to fully acquaint themselves with the conditions, requirements and specifications of this RFP before submitting proposals. Each tenderer assumes all risks for resource commitment and expenses, direct or indirect, of proposal preparation and participation throughout the RFP process. The CSIR is not responsible directly or indirectly for any costs incurred by tenderers.

## 22 CORRECTNESS OF RESPONSES

22.1 The tenderer must confirm satisfaction regarding the correctness and validity of their proposal and that all prices and rates quoted cover all the work/items specified in the RFP. The prices and rates quoted must cover all obligations under any resulting contract.

22.2 The tenderer accepts that any mistakes regarding prices and calculations will be at their own risk.

## 23 VERIFICATION OF DOCUMENTS

23.1 Tenderers should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by the CSIR in regard to anything arising from the fact that pages are missing or duplicated.

23.2 ***One hard copy and one electronic copy (CD or USB memory key)*** of each proposal must be submitted. In the event of a contradiction between the submitted copies, the hard copy shall take precedence.

23.3 Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.

23.4 If a courier service company is being used for delivery of the proposal document, the RFP description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered to the tender box, by the stipulated due date.

## 24 SUB-CONTRACTING

24.1 A tenderer 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, unless the intended sub-contractor is an exempted micro enterprise that has the capability and ability to execute the sub-contract.

24.2 A tenderer awarded a contract may not sub-contract more than **25%** of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an exempted micro enterprise that has the capability and ability to execute the sub-contract.

## **25 ENGAGEMENT OF CONSULTANTS**

The consultants will only be remunerated at the rates:

25.1 Determined in the "Guideline for fees", issued by the South African Institute of Chartered Accountants (SAICA); or

25.2 Set out in the "Guide on Hourly Fee Rates for Consultants", by the Department of Public Service and Administration (DPSA); or

25.3 Prescribed by the body - regulating the profession of the consultant.

## **26 TRAVEL EXPENSES**

26.1 All travel expenses for the CSIR's account, be it directly via the CSIR's travel agent or indirectly via re-imburements, must be in line with the CSIR's travel policy. The following will apply:

26.1.1 Only economy class tickets will be used.

26.1.2 A maximum of R1300 per night for accommodation, dinner, breakfast and parking will be allowed.

26.1.3 No car rentals of more than a Group B will be accommodated.

## **27 ADDITIONAL TERMS AND CONDITIONS**

27.1 A tenderer shall not assume that information and/or documents supplied to CSIR, at any time prior to this request, are still available to CSIR, and shall consequently not make any reference to such information document in its response to this request.

27.2 Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.

27.3 In case of proposal from a joint venture, the following must be submitted together with the proposal:

- Joint venture Agreement including split of work signed by both parties;
- The original or certified copy of the B-BBEE certificate of the joint venture;
- The Tax Clearance Certificate of each joint venture member;
- Proof of ownership/shareholder certificates/copies; and
- Company registration certificates.

27.4 An omission to disclose material information, a factual inaccuracy, and/or a misrepresentation of fact may result in the disqualification of a tender, or cancellation of any subsequent contract.

27.5 Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

## **28 CSIR RESERVES THE RIGHT TO**

28.1 Extend the closing date;

28.2 Verify any information contained in a proposal;

28.3 Request documentary proof regarding any tendering issue;

28.4 Give preference to locally manufactured goods;

28.5 Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);

28.6 Award this RFP as a whole or in part;

28.7 Cancel or withdraw this RFP as a whole or in part.

## **29 DISCLAIMER**

This RFP is a request for proposals only and not an offer document. Answers to this RFP must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submission of its proposal, tenderers shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFP. –The CSIR makes no representation, warranty, assurance, guarantee or endorsements to tenderer concerning the



RFP, whether with regard to its accuracy, completeness or otherwise and the CSIR shall have no liability towards the tenderer or any other party in connection therewith.

## DECLARATION BY TENDERER

**Only tenderers who completed the declaration below will be considered for evaluation.**

**RFP No: 3277/09/04/2019**

I hereby undertake to render services described in the attached tendering documents to CSIR in accordance with the requirements and task directives / proposal specifications stipulated in **RFP No. 3277/09/04/2019** at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the CSIR during the validity period indicated and calculated from the closing date of the proposal.

I confirm that I am satisfied with regards to the correctness and validity of my proposal; that the price(s) and rate(s) quoted cover all the services specified in the proposal documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this proposal as the principal liable for the due fulfilment of this proposal.

I declare that I have no participation in any collusive practices with any tenderer or any other person regarding this or any other proposal.

I accept that the CSIR may take appropriate actions, deemed necessary, should there be a conflict of interest or if this declaration proves to be false.

I confirm that I am duly authorised to sign this proposal.

NAME (PRINT) .....

CAPACITY .....

SIGNATURE .....

NAME OF FIRM .....

DATE .....

WITNESSES	
1	.....
2	.....
DATE:.....	

30 ANNEXURE A

No.	Criteria	Proof required	Points allocation	Weight
1.	<b>Broker's experience in providing medical aid brokerage services</b>	The bidder must submit a proposal clearly indicating their knowledge of the industry, applicable legislation and how they have contributed to the industry	<b>0</b> – poor submission or non –submission <b>5</b> – limited industry knowledge <b>7</b> – acceptable industry knowledge and some contribution <b>10</b> – Has in-depth knowledge of the industry and has contributed to the industry	<b>10</b>
2.	<b>References</b>  Broker's demonstrated expertise in negotiating medical aid on behalf of clients of similar size as the CSIR	Reference Letters, with the following information as a minimum <ul style="list-style-type: none"> <li>- Client</li> <li>- Contact Person</li> <li>- Contact Number</li> <li>- Email</li> <li>- Position placed</li> <li>- Year position placed</li> </ul> Performance rating for service rendered	<b>0</b> – less than 2 references <b>5</b> – 2 to 3 references <b>7</b> – 3 to 5 references <b>10</b> – more than 5 references	<b>5</b>
3.	<b>Infrastructure</b>	Bidder must provide details of information technology system which the Medical Scheme Broker use to provide the above services; Call Centre; Website; Electronic tools / communication, as a minimum.	<b>0</b> – poor submission / no submission <b>5</b> – limited infrastructure <b>7</b> – adequate infrastructure <b>10</b> – has more than adequate infrastructure	<b>10</b>

4.	<b>National Footprint</b>	The bidder must provide evidence of their capability to service CSIR regionally	<b>0</b> – poor submission / no submission <b>5</b> – limited ability <b>7</b> – adequate ability <b>10</b> – has more than adequate ability	<b>5</b>
5.	<b>Reporting</b>	The bidder must provide samples of reports that cover the required Scope	<b>0</b> – Did not provide any sample report or did not understand requirements. <b>5</b> – The report(s) do not address all key elements <b>7</b> – The reports provided are adequate <b>10</b> – The reports provided exceed the requirements and expectations	<b>20</b>
6.	<b>Value add services</b>	The bidder is expected to provide in detail their additional value-add offering	<b>0</b> – poor submission / no submission <b>5</b> – limited value add offering <b>7</b> – adequate value add offering <b>10</b> – has provided value add offering beyond expectations	<b>10</b>
7.	<b>Methodology and approach</b>	The bidder must provide ideas, strategic initiatives and innovative approach on how the account will be managed. The approach clearly indicate how the bidder will deliver to the required scope. The approach must also include how the bidder will integrate with CSIR's EAP programme and EAP service provider.	<b>0</b> – poor submission / no submission <b>5</b> – bidder did not address the scope <b>7</b> – Proposal and approach meets the requirements of the tender, and the bidder has clearly demonstrated how they will meet the strategic needs of the CSIR. <b>10</b> – The approach is innovative and exceeds the requirements of the CSIR.	<b>40</b>

## 31 ANNEXURE B RETURNABLE CHECKLIST

**NOTE:** The bidder is required to complete each and every schedule listed below to the best of his ability as the evaluation of tenders and the eventual contract will be based on the information provided by the bidder. Failure of a bidder to complete the schedules and forms to the satisfaction of the CSIR will inevitably prejudice the tender and may lead to rejection on the grounds that the tender is not responsive.

The bidder must complete the following returnable documents:

<b>RETURNABLE DOCUMENTS –</b>		
<b>PART A: TECHNICAL RETURNABLES</b>		
<b>ONE HARD COPY AND ONE ELECTRONIC COPY (CD OR USB MEMORY KEY)</b>		
Description	Included	
	Yes	No
<p><b>Broker’s experience in providing medical aid brokerage services</b></p> <p>The bidder must submit a proposal clearly indicating their knowledge of the industry, applicable legislation and how they have contributed to the industry</p>		
<p><b>References</b></p> <p>Reference Letters, with the following information as a minimum</p> <ul style="list-style-type: none"> <li>- Client</li> <li>- Contact Person</li> <li>- Contact Number</li> <li>- Email</li> <li>- Position placed</li> <li>- Year position placed</li> <li>- Performance rating for service rendered</li> </ul>		
<p><b>Infrastructure</b></p> <p>Bidder must provide details of information technology system which the Healthcare Consultants use to provide the above services; Call Centre; Healthcare Website; Electronic tools / communication as a minimum.</p>		
<p><b>National Footprint</b></p> <p>The bidder must provide evidence of their capability to service CSIR regionally.</p>		
<p><b>Reporting</b></p> <p>The bidder must provide examples of reports that cover the required Scope</p>		
<p><b>Value add services</b></p> <p>The bidder is expected to provide in detail their value additional value-add offering</p>		
<p><b>Methodology and approach</b></p> <p>The bidder must provide ideas, strategic initiatives and innovative approach on how the account will be managed. The approach clearly how the bidder will be</p>		

deliver to the required scope. The approach must also include how the bidder will integrate with CSIR's EAP programme and EAP service provider.		
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***Any other relevant document may be submitted, to substantiate the bidder's proposal.***

### 32 ANNEXURE C SBD1 FORM

PART A  
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE <b>CSIR</b>					
BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
DESCRIPTION					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON			CONTACT PERSON		
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS			E-MAIL ADDRESS		
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		<b>OR</b>	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX]  <input type="checkbox"/> Yes <input type="checkbox"/> No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					

2.1 ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	2.2 ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3 ]
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**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?  YES  NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA?  YES  NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?  YES  NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?  YES  NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?  YES  NO

**IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.**

**PART B TERMS AND CONDITIONS FOR BIDDING**

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION. 1.2. <b>ALL BIDS MUST BE SUBMITTED 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 ENGAGED WITH NEGOTIATIONS BY THE CSIR THAT MIGHT RESULT IN THE ISSUING OF A PURCHASE ORDER.</b>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
2.3 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS. 2.4 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE CSIR TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS. 2.5 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA. 2.6 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID. 2.7 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER. 2.8 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED. 2.9 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: .....