



## Request for Proposals (RFP)

### The Provision of Medical Scheme Brokerage Services to the CSIR for a period of 3 years.

**RFP No. 3508/15/02/2022**

Date of Issue	Tuesday, 01 February 2022	
Briefing Session	None	
Closing Date	Tuesday, 15 February 2022 at 16h30 ( <b>Late bids will not be considered</b> )	
Enquiries and submission of proposals	Strategic Procurement Unit	E-mail: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a> ( <b>Please use RFP No. as subject reference</b> )
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 a number of 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 SCOPE OF SERVICE**

- 4.1** The CSIR requires advisory services of a Medical Scheme Broker who will need to provide support to the CSIR by aligning its service offering to the CSIR health care and wellness requirements.
- 4.2** 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 health 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.
- 4.3** 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 be in contact with the Registrar of Medical Schemes regarding this initiative. 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.

- 4.4** The Medical Scheme Broker must identify 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 employees.
- 4.5** 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.
- 4.6** The medical scheme environment and regulations are extremely complex and requires expert knowledge in order to manage medical scheme options 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 schemes.
- 4.7** The Medical Scheme Broker will be required to appoint a Consultant to the CSIR who will provide integrated medical scheme advisory services. The Medical Scheme Broker must be aligned to the CSIR Health and Wellness Strategy and provide relevant and effective support structures to all CSIR employees and management.
- 4.8** The CSIR current Medical Scheme Provider is Bestmed. The organisation is of the opinion that with appropriate advice from the Medical Scheme Broker the introduction of a second/third 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.

#### **4.9 The Medical Scheme Broker will be required to:**

- 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).
- Have regular meetings with the relevant CSIR stakeholders to discuss medical scheme matters and advise on ways to enhance service delivery and any current matters/issues.
- Demonstrate willingness and ability to travel when required
- 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.

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

#### **4.10 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.

#### **4.11 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 claims analysis;
- Employee utilisation (contributions vs. claims); and
- Year on year trend analysis.

#### **4.12 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 Medical Scheme Broker will be required to assist with 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;
- Report on and monitor the claims processing efficiencies of the medical scheme administrator with regard to both initial and escalated / problematic claims;
- Provide 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.

#### **4.13 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;
- 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 wellness communication strategy and annual year planner linked to hot topics.

#### **4.14 Employee Wellness Programme**

The Medical Scheme Broker will be required to participate in the design and implementation of the CSIR Wellness 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.

#### **4.15 Other value-adding services**

The broker must demonstrate a thorough understanding of COID Act, and how they will assist the CSIR Human Capital 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.



## **5 MANDATORY REQUIREMENTS**

- 5.1** Valid proof of accreditation and registration with the Council for Medical Schemes (certification to be provided); and
- 5.2** Valid proof of registration with the Financial Sector Conduct Authority (FSCA) (certification to be provided).
- 5.3** The individuals that will be providing the actual service should hold FPI (Financial Planning Institute) certification

## **6 FUNCTIONAL EVALUATION CRITERIA**

- 6.1** Functional evaluation will be done in two phases. The first phase will be based on the bidder's technical submission and the second phase on a presentation to be delivered by the bidder.
- 6.2** The purpose of the presentation is to provide the opportunity to the bidder to present their proposal, as well as to mutually clarify issues relating to the brief and project as a whole. It is not an opportunity for the bidders to amend their proposals.
- 6.3** Bidders who proceed to the second phase will each be allocated 20 minutes to present their proposal and will be expected to respond to clarity seeking questions posed by the committee member(s).
- 6.4** Bidders that achieve an overall minimum technical score of 70% and not less than 50% on each criterion for phase one of the evaluation will be invited for presentations.
- 6.5** The bidding companies who qualify for the second phase of evaluation will be notified in advance of the date and venue of the presentations.
- 6.6** Bidder will be required to achieve an overall score of not less than 50% for phase two in order to be evaluated further on price and B-BBEE.
- 6.7** The evaluation of the functional / technical detail of the proposal will be based on the scoring criteria provided in Appendix A

**It is critical that you examine how the points will be allocated per item to avoid your team being marked down or disqualified if the information required is not explicit.**

## **7 ELIMINATION CRITERIA**

Proposals will be eliminated under the following conditions:

- Submission after the deadline;
- Failure to submit mandatory requirements/documents;
- Proposals submitted at incorrect e-mail
- Bidders who are restricted by National Treasury.

## **8 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE REGISTRATION AND TAX CLEARANCE CERTIFICATE**

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
- Have its tax affairs in good standing with the South African Revenue Service (SARS).

Failure to register on the National Treasury's Central Supplier Database or resolve tax affairs within a period of 7 (seven) days following request to do so will lead to elimination.

## SECTION B – TERMS AND CONDITIONS

### 9 PROCEDURE FOR SUBMISSION OF PROPOSALS

- 9.1 All proposals must be submitted electronically to [tender@csir.co.za](mailto:tender@csir.co.za)
- 9.2 Respondents must use the RFP number as the subject reference number when submitting their bids.
- 9.3 The e-mail and file sizes should not exceed a total of 25MB per e-mail.
- 9.4 The naming/labeling syntax of files or documents must be short and simple.
- 9.5 All documents submitted electronically via e-mail must be clear and visible.
- 9.6 All proposals, documents, and late submissions after the due date and time will not be evaluated.
- 9.7 Proposals submitted by companies must be signed by a person or persons duly authorised to do so.
- 9.8 The CSIR will not consider submissions on any other platform(s), including cloud not provided for in this RFP document.
- 9.9 All proposals, documents, and late submissions after the due date and time will not be evaluated.

#### **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.

- 9.10 Proposals submitted by companies must be signed by a person or persons duly authorised.
- 9.11 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.

**NB: NO HARD COPIES OR PHYSICAL SUBMISSIONS WILL BE ACCEPTED**

### 10 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the address mentioned above no later than the closing date of **15 February 2022** by 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 be disqualified.

## 11 TENDER PROGRAMME

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

- Issue of tender documents: 01 February 2022
- Last date for submission of queries: 09 February 2022
- Closing / submission Date: 15 February 2022

## 12 AWARDING OF TENDERS

12.1 Awarding of tender will be published on the National Treasury e-tender portal or the CSIR's tender website. No regret letters will be sent out.

## 13 EVALUATION PROCESS

### 13.1 Evaluation of proposals

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

A two-phase evaluation process will be followed.

- The first phase includes **elimination** of tenders based on the elimination criteria and evaluation on **functionality requirements**, local production and content, if applicable.
- The second phase includes the evaluation of tenders based on **price** and **B-BBEE** status.

Pricing Proposals will only be considered after functionality phase has been adjudicated and accepted. Only proposals that achieved the specified minimum qualification scores for functionality will be evaluated further using the preference points system.

## 14 PRICING PROPOSAL

14.1 No pricing proposals submissions are required for this RFP

14.2 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:

*"Subject to sub-regulation (3), the maximum amount payable to a broker by a*

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*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–*

- (a) R 101,9 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*
- (b) 3% plus value added tax (VAT) of the contributions payable in respect of that member, whichever is lesser”*

## **15 VALIDITY PERIOD OF PROPOSAL**

Each **proposal** shall be valid for a minimum period of four (04) months calculated from the closing date.

## **16 APPOINTMENT OF SERVICE PROVIDERS**

- 16.1** 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.
- 16.2** 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.
- 16.3** Awarding of contracts will be announced on the National Treasury website and no regret letters will be sent to unsuccessful bidders.

## **17 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 3508/15/02/2022 – 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.

## **18 MEDIUM OF COMMUNICATION**

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

## **19 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.

## **20 CORRECTNESS OF RESPONSES**

- 20.1** 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.
- 20.2** The tenderer accepts that any mistakes regarding prices and calculations will be at their own risk.

## **21 VERIFICATION OF DOCUMENTS**

- 21.1** 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 regarding anything arising from the fact that pages are missing or duplicated.
- 21.2** 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.

## **22 SUB-CONTRACTING**

- 22.1** 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.
- 22.2** 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.
- 22.3** Where the tenderer intends to sub-contract a portion of the contract, the capabilities of the subcontractor will be evaluated in accordance with the criteria defined in the RFP.

The tenderer must provide a sub-contract agreement indicating the split of work and duly signed by parties thereto.

## **23 ENGAGEMENT OF CONSULTANTS**

The consultants will only be remunerated at the rates:

- 23.1** Determined in the "Guideline for fees", issued by the South African Institute of Chartered Accountants (SAICA); or
- 23.2** Set out in the "Guide on Hourly Fee Rates for Consultants", by the Department of Public Service and Administration (DPSA); or
- 23.3** Prescribed by the body regulating the profession of the consultant.

## **24 ADDITIONAL TERMS AND CONDITIONS**

- 24.1** 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.
- 24.2** Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- 24.3** 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.
- 24.4** 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.
- 24.5** Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

## **25 CSIR RESERVES THE RIGHT TO**

- 25.1** Extend the tender validity period.
- 25.2** Verify any information contained in a proposal.
- 25.3** Request documentary proof regarding any tendering issue.
- 25.4** Give preference to locally manufactured goods.
- 25.5** Cancel or withdraw this RFP as a whole or in part.

## **26 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.



**27 DECLARATION BY TENDERER**

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

**RFP No: 3508/15/02/2022**

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. 3508/15/02/2022** 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.....	

**28 ANNEXURE A**

**Phase 1**

No.	Criteria	Proof required	Points allocation	Weight
1.	<b>Broker's experience in providing medical aid brokerage services</b>	<p>The bidder</p> <p>An indication of years of experience (as an entity or key individuals) actively involved in the medical scheme brokerage industry</p>	<p>0 – less than 2 years experience in medical scheme industry</p> <p>5 – more than 2 years and less than 5 years experience in industry</p> <p>7 5 years experience in industry</p> <p>10 – More than 5 years experience the industry and has contributed to the industry</p>	10
2.	<b>References</b>  <b>Bidder's client experience</b>	<p align="center">-</p> <p>Bidders must provide on their response a client list where they are providing medical scheme broker services. The reference information for each client provided must include the following:</p> <ul style="list-style-type: none"> <li>• Company Name;</li> <li>• Contact Person;</li> <li>• Size of the company</li> <li>• Phone numbers</li> <li>• Business address;</li> <li>• Duration of the contract; and</li> <li>• Brief description of the services provided.</li> </ul> <p>Please note that CSIR may contact the clients for a reference check. It is important to ensure that the clients listed by the Bidder are contactable.</p> <p align="center">-</p>	<p>0 = Bidder has submitted no client details</p> <p>5 = Bidder has submitted details of 1 - 2 clients</p> <p>7 = Bidder has submitted details of 3 – 4 clients</p> <p>10 = Bidder has provided details of 5 clients or more</p>	5

3.	<b>Communication Tools</b>	<p>The Bidder must provide a short description supported by a screen dump of communication tools for example:</p> <p>Web functionality; Self-service functionality; Virtual communication tool Contact centre functionality; and Bulk SMS functionality.</p>	<p>0 – No examples provided 5 – between 2-3 communication tools provided 7 – Examples of all communication tools provided 10- Communication tools exceed the requirements set out in the scope</p>	15
4.	<b>Reporting</b>	<p>The bidder must provide samples of reports that cover the required Scope</p>	<p>0 – Did not provide any sample report or did not understand requirements. 5 – The report(s) do not address all key elements set out in the scope 7 – The reports provided meet requirements set out in scope 10 – The reports provided exceed the requirements and expectations set out in scope</p>	20
5.	<b>Value add services</b>	<p>The bidder is expected to provide in detail their additional value-add offerings.</p> <ul style="list-style-type: none"> <li>• Bidder provides value adds in terms of customer services, and various innovative service delivery approaches including use of technology, etc.</li> </ul>	<p><b>0 points</b> - bidder failed to provide any value-add services</p> <p><b>5 points</b> – Proposed value add is very generic. The bidder’s approach addresses and meets minimum or basic CSIR requirements.</p> <p><b>7 points</b> - Proposed value add is specifically tailored to suit the CSIR’s requirements.</p> <p><b>10 points</b> - bidder proposed innovative value add</p>	10

6.	<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 indicates how the bidder will deliver to the required scope. The approach must also include how the bidder will partner with CSIR's EAP programme and EAP service provider.	0 – poor submission / no submission 5 – bidder did not address the scope 7 – Proposal and approach meets the requirements of the scope, and the bidder has clearly demonstrated how they will meet the strategic needs of the CSIR. 10 – The approach is innovative and exceeds the requirements of the CSIR.	40
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**Phase 2**

No.	Criteria	Points allocation	Weight
1	<p><b>STRATEGY DEVELOPMENT</b> Shortlisted Bidder to deliver a presentation on their experience in medical scheme brokerage service and on a detailed approach on how the it will deliver the required scope.</p>	<p><b>0 points</b> – The strategy approach does not meet CSIR’s expectations. Bidder failed to articulate understanding of project requirements.</p> <p><b>5 points</b> - The strategy approach is very generic. It addresses and meets minimum or basic project requirements.</p> <p><b>7 points</b> - The strategy approach is specifically tailored to suit the CSIR’s requirements.</p> <p><b>10 points</b> - The strategy approach is innovative and more than exceeds the expectations of the CSIR.</p>	100%
	<b>Total</b>		100%

## 29 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>Description</b>	<b>Included</b>	
	<b>Yes</b>	<b>No</b>
Sample reports		
<p><b>Company References – (Client reference letters or Completed reference form - Annexure C)</b></p> <p>References should be presented in a form of a written letter on an official letterhead from clients where similar services have been provided.</p> <p><b>Annexure C to be completed by the referee and not the bidder.</b></p> <p>The references letters must have the following details:</p> <ul style="list-style-type: none"> <li>• The reference letter must be in official client company letterhead.</li> <li>• The reference letter must be from different entities</li> <li>• The Reference letter must indicate the description of the services and date of the service provided, and value of the transaction or contract.</li> <li>• The reference letter must have email address and telephone number.</li> </ul> <p>In support of the reference letters, the bidder must provide previous successful endeavours.</p>		
<p><b>Methodology and Approach including Work plan/timelines – (Detailed Methodology, Approach and Gantt Chart)</b></p> <p>The service provider must explain their understanding of the objectives of the assignment, approach to the assignment and the methodology for carrying out the assignment. The main activities of the assignment, their</p>		

content and duration, phasing and interrelations, milestones, and delivery dates of the reports.		
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<b>PART B: PRICING PROPOSAL</b>		
B-BBEE Certificate		
Completed SBD1 Form		

### 30 ANNEXURE C - REFERENCE FORM

It is critical for the referee to complete the form fully. CSIR will not give scores for incomplete forms

Referee Company legal Name: .....

Bid Description (reference provided for): .....

Describe the service/work done: .....

.....

.....

Project Start Date: ..... Project End Date: .....

Contract Amount: .....

Rate Service Provider (Put a mark to the relevant score)

Indicator	Excellent	Very good	Good	Poor	Unacceptable
Score	5	4	3	2	1

Would you use the service provider again: Yes / No

Referee Contact Person: .....

Referee Designation: .....

Referee Contact number: .....

Referee Email: .....

I hereby declare that to the best of my knowledge, information completed above is true and correct.

Bidder's referee signature: ..... Date: .....



### 31 ANNEXURE D INVITATION TO BID

#### SBD1 FORM - PART A

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE CSIR</b>					
BID NUMBER:	RFP: 3508/15/02/2022	CLOSING DATE:	15/02/2022	CLOSING TIME:	16h30
DESCRIPTION	Request for Proposal (RFP) for the Provision of Medical Scheme Brokerage Services to the CSIR				
<b>BID RESPONSE DOCUMENTS MAY BE EMAILED TO THE BELOW E-MAIL ADDRESS</b>					
Bid response documents are to be submitted to this e-mail address: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a>					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	Mmatabane Hlapisi		CONTACT PERSON	Mmatabane Hlapisi	
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	tender@csir.co.za		E-MAIL ADDRESS	tender@csir.co.za	
<b>SUPPLIER INFORMATION</b>					
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:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					
31.1.1.1	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]		31.1.1.2	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? <input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
<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?

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 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 PIN 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: .....