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**THE PUBLIC SERVICE SECTOR EDUCATION TRAINING AUTHORITY**

**TERMS OF REFERENCE**

**APPOINTMENT OF A SUITABLE SERVICE PROVIDER FOR THE PROVISION OF AN EMPLOYEE WELLNESS PROGRAM TO THE PSETA FOR THE PERIOD OF THREE (3) YEARS.**

**RFP NUMBER:**

**CLOSING DATE: 13 NOVEMBER 2026**

**CLOSING TIME:11H00**

## 1. INTRODUCTION

1.1. The Public Service Sector Education and Training Authority (PSETA) is a Sector Education and Training Authority (SETA) established by the Skills Development Act (97 of 1998, as amended) and is classified as a National Public Entity under schedule 3A of the Public Finance Management Act, 1 of 1999.

1.2. The PSETA has 64 funded approved positions and has recently approved Employee Wellness Plan that provides a structured framework for improving employee wellbeing, engagement and organisational culture.

1.3. The plan directly addresses employee concerns identified through the Wellness, Culture and Leadership Survey, particularly in relation to stress, workload management, mental health, leadership effectiveness, communication, recognition, collaboration and career development.

1.4. Through the implementation of this plan and alignment with South African health and wellness awareness campaigns, PSETA will create a healthier, more engaged, productive and supportive workplace where employees can thrive both personally and professionally.

## 2. BACKGROUND

2.1. The PSETA is committed and dedicated to putting its employees first. As the employer of choice, PSETA continuously provides platforms for employees to receive support to be productive in their personal and professional life. Unsatisfactory job performance, absenteeism, lateness, accidents are often early warning signs of deeper personal, professional and environmental problems. PSETA recognises that early detection and appropriate interventions to address personal, professional and environmental stressors can prevent or alleviate poor performance, accidents and absenteeism.

2.2. PSETA has a Policy on Employee Wellness which aims to create a formal mechanism to assist employees in the management of personal problems that have a direct bearing on their performance. However, the PSETA currently does not have an in house Employee Wellness Office or Practitioner, This function is coordinated in the Human Capital Management Department.

2.3. The suitable service provider should provide the service to the employees in consideration of the PSETA approved Employee Wellness Plan.

## 3. COMPETENCIES

3.1. A minimum of 5 years' experience in managing Employee Wellness Programmes, Employee Assistance Programmes (EAPs), organisational health and wellness initiatives, or related projects.

3.2. Proven experience in project planning, implementation, monitoring, and reporting of wellness interventions within a corporate or public sector environment.

3.3. Knowledge of occupational health, psychosocial support, employee wellbeing, mental health awareness, work-life balance, health promotion, and wellness best practices.

3.4. Experience in coordinating multidisciplinary teams, including psychologists, social workers, wellness practitioners, healthcare professionals, and trainers.

3.5. Strong stakeholder management, communication, facilitation, and change management skills.

3.6. Ability to provide strategic advice and recommendations to management on employee wellness trends and interventions.

3.7. Relevant qualification in Human Resources, Psychology, Social Work, Occupational Health, Project Management, or a related field.

3.8. A recognised Project Management qualification will be an added advantage.

3.9. Professional Body Registration.

3.10. Valid registration certification.

## 4. RATIONALE AND PURPOSE

4.1. The rationale behind appointing a service provider for the provision of an Employee Wellness Programme is to support and improve the performance of PSETA by helping its employees to deal with their personal and work-related problems and challenges effectively.

4.2. In addition to the above, the purpose is also to provide consultancy support and guidance for the management to assist them with monitoring their employee's job performance, intervening early, and where necessary, to take appropriate action to correct the situation.

4.3. The PSETA appreciates the role and support family members play in employee's life, therefore extends the service to immediate family members. The programme aims to provide extra support for employees in managing the circumstances of domestic life before these begin to impact on work.

## 5. SCOPE OF WORK

5.1. In order to meet this objective, PSETA seeks to appoint a competent and suitable Employee Assistance Programme service provider with proven expertise in (counselling, trauma support, financial, broader HR-related support, general workplace support and legal advice).

5.2. Establish and maintain an employee work-life balance through wellness programmes and its activities.

5.3. Establish and Maintain a holistic approach to support the employees in managing work, personal and social challenges.

5.4. Provide employees and their immediate family members with a comprehensive resources to help them deal with life challenges; and

5.5. Provide management with practical resources to support employees with personal and work-related challenges when they impact on an employee's performance and wellbeing.

5.6. The Employee Wellness Program Service Provider will report directly to the Human Capital Management Manager who will also monitor the quality of the performance of the service provider.

## 6. METHODOLOGY AND APPROACH

| REFERENCE OF SERVICE COMPONENTS | SERVICE DESCRIPTION |
|---|---|
| **SERVICES 1: COUNSELLING SERVICE** | |
| • Toll free telephonic supportive counselling | • Professional Support Line Service<br>Via a 24/7/365 Call Centre. A 24-hour multilingual, psychological counselling service to be available to all eligible employees and immediate family members.<br>• Call Back service by the Service provider. |
| • Personal Face to Face Counselling | • 6-8 Personal Counselling Sessions per employee - Face to face counselling for employees and family members. sessions to be close to the employee/family member residence or place of work. |

| | |
|---|---|
| • Critical Incidence Services (Trauma debriefing) | • A Critical Incident service - offering prompt and professional trauma debriefing and counselling services to employees exposed to incidents of trauma. |
| • Electronic on-line advisory services and promotional material | • Access to a comprehensive Online Wellness Programme. The programme includes an integrated suite of email and web-based health management applications including interactive disease management tools; a selection of health and wellness information; as well as personalised information on a range of employee wellbeing related topics such as stress management, substance abuse, and trauma management. Printable resources.<br>• Custom-designed and continuing communication programmes to correctly position the EWP, ensure understanding and encourage all employees to use the service. |
| SERVICE 2: LIFE MANAGEMENT SERVICES | |

| | |
|---|---|
| • Life management services:<br>  • Debt management and advocacy<br>  • Money management (Budgeting)<br>  • Legal advice and guidance<br>  • Family Care. | • A legal wellbeing service that provides PSETA employees with detailed practical information, education, counselling, resources and referrals on a broad range of legal matters, consumer affairs and social benefits. Assistance on labour law matters is excluded from the service.<br>• Financial wellbeing: This component of the service will assist employees who have queries relating to finances and debt.<br>• Family care support: It will focus on the provision of information and guidance on a broad range of family related issues. |
| ANNUAL OFFERINGS AND AD HOC SERVICES | |
| • Wellness Screening/ Employee Health Day Twice (2) a year of each year (3) cycle. | • Service rendering will include medical health screening of employees where the service provider will be responsible for coordinating the event with (Motivator of Cancer January, International Epilepsy Day February, International Women's Day March and Health Awareness Month / World Autism Awareness Day April.<br>• Men's Health in June and International Children's Day / Men's Health Month /National Blood Donor Month, Women's Day in May and GBV in May and Mother's Day and Father's Day in June and World Contraception Day in September and International Foetal Alcohol Syndrome Day and National Stroke Week in October, Global<br>• Handwashing Day and Mental Health Awareness Month / Breast Cancer Awareness Month / International Day of Older Persons in |

| | |
|---|---|
| | October and Disability Rights Awareness month in November and World Diabetes Day, 16 Days of Activism for No Violence Against Women and Children in December and World Aids Day event December). |
| • Awareness education and Training | • Awareness presentations to PSETA Staff on different health and wellness related issues. Awareness events to be coordinated from the service provider's side. |
| • Health Risk Management Services | As and when needed assessments of:<br>• Short/Long Period Temporary incapacity Applications<br>• Assessment of ILL Health Retirement Application |

## 6. TIME FRAME

6.1. The services of the appointed service provider will be required for a period of three (3) years.

## 7. COSTING

7.1. A cost analysis must be given to cover the full project amount. The proposed project pricing must be all-inclusive (i.e. including professional fees, venue hire, travel expenses, disbursements and VAT).

7.2. Cost breakdown for a period of three(3) years on escalation based on CPI.

7.3. The PSETA may require a breakdown of rates on any of the items priced and service providers are required to provide same. PSETA reserves the right to negotiate the price.

## 8. EVALUATION PROCESS

8.1. The bids will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for specific goals, once the minimum functionality criteria is met.

**PHASE 1: FUNCTIONALITY EVALUATION**

8.2. Bids must meet the minimum threshold criteria in respect of functionality of 70 points out of 100 points that will be awarded for functionality before they are considered further. Any bid that does not meet the minimum eligibility threshold will be automatically disqualified.

**PHASE 1 – FUNCTIONALITY EVALUATION**

| Domain | Evaluation Method | Criteria | Weight |
|---|---|---|---|
| **1. Company experience** | Minimum of three (3) years in which the company has been rendering Employee Wellness Programmes. Company profile clearly indicating the number of years in business providing employee wellness services. | **Experience:**<br>**0 Years' Experience = 0 Points**<br>**1 – 2 Years' Experience = 2 Points**<br>**3 – 4 Years' Experience = 4 Points**<br>**5 or more Years' Experience = 5 Points** | **30** |
| **2. Knowledge and experience of project manager** | • A minimum of 5 years' experience in managing Employee Wellness Programmes, Employee Assistance Programmes (EAPs), organisational health and wellness initiatives, or related projects.<br>• Proven experience in project planning, implementation, monitoring, and reporting | **0 - No information provided.**<br>**1 – 2 Limited relevant experience.**<br>**3 - Meets minimum experience requirements**<br>**4 - Extensive relevant experience with similar projects**<br>**5 - Extensive experience with proven successful** | **40** |

| Domain | Evaluation Method | Criteria | Weight |
|---|---|---|---|
| | of wellness interventions within a corporate or public sector environment.<br>• Knowledge of occupational health, psychosocial support, employee wellbeing, mental health awareness, work-life balance, health promotion, and wellness best practices.<br>• Experience in coordinating multidisciplinary teams, including psychologists, social workers, wellness practitioners, healthcare professionals, and trainers.<br>• Strong stakeholder management, communication, facilitation, and change management skills.<br>• Ability to provide strategic advice and recommendations to management on employee wellness trends and interventions. | **delivery of similar wellness programmes and strong references** | |

| Domain | Evaluation Method | Criteria | Weight |
|---|---|---|---|
| | • Relevant qualification in Human Resources, Psychology, Social Work, Occupational Health, Project Management, or a related field, Professional Body registration and valid certification.<br>• A recognised Project Management qualification will be an added advantage. | | |
| **3. Methodology** | The service provider must outline the methodology and approach on the following:<br>- Wellness<br>- EWP strategy<br>- Events calendar | **Methodology and approach not submitted = 0 Points**<br>**Methodology and approach submitted 1 of 3 = 1 Points**<br>**Methodology and approach submitted 2 of 3 = 3 Points**<br>**Methodology and approach ALL submitted = 5 Points** | **20** |
| Reference letters | The service provider must have a proven record of rendering the same service. The last three (5) contactable references | **0 reference letters = 0 Points**<br>**1 – 2 reference letters = 2 Points** | **10** |

| Domain | Evaluation Method | Criteria | Weight |
|---|---|---|---|
| | | **3 – 4 reference letters = 3 Points**<br>**5 - reference letters = 5 Points** | |
| **Total** | | | **100** |

## 9. PROPOSAL EVALUATION AND APPOINTMENT OF SERVICE PROVIDER

9.1. The proposals will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for specific goals once the minimum functionality criteria are met. The evaluation will be based on:

The evaluation will be based on

| | | **Points** |
|---|---|---|
| **Price** | | **80** |
| **Special goals** | | **20** |
| Black owned company<br>Bidder who has 51% to 100% black people ownership | 8 | |
| Women<br>Bidder who has 51% to 100% women ownership | 4 | |
| Youth<br>Bidder who has 51% to 100% youth ownership | 5 | |
| Disability<br>Bidder who has 51% to 100% disability ownership | 3 | |
| **Total** | | **100** |

## 10. FORMAT OF THE BID SUBMISSION:

### 10.1. Two stage evaluations:

10.1.1. Technical Proposals (Files) must be clearly marked.

10.1.2. Financial Proposal must be in a separate envelope clearly Marked "Financial Proposal" with bid description, bidder's name and closing date and time of bid.

10.2. Submission of all applicable documents as indicated below:

To claim points on disability, the bidder must provide proof of disability (Medical Report, letter from authorised body/Doctor as evidence.

- Certified copy of doctor's certification with medical practice number in order claim points for disability as per SBD 6.1.
- Certified copies of the director's ID's document
- Certified copy of BB-BEE certificate or sworn affidavit
- Valid Tax compliance status (TCS) PIN or proof of exemption from SARS;
- Copy of the registration document of the organisation (CIPC);
- Copy of the Central Supplier Database registration.

## 11. IMPORTANT MANDATORY INFORMATION FOR BIDDERS

11.1. All Standard Bidding documents (SBD) documents must be completed and signed.

- SBD 1 (All sections must be fully completed)
- SBD 4 (All sections must be fully completed)
- SBD 6.1(All sections must be fully completed)
- Proof of registration on Central Supplier Database.
- General Conditions of Contract (All pages must be signed or initialled)
- Employee Assistance Professionals Association of South Africa (EAPA-SA).
- Proposals should be submitted in hard copies (one original and two copies).

**NB: Please note that failure to submit documents requested on section 11.1 will render the proposal disqualified.**

Bid must be submitted to: Ms Lungile Mokoena
SCM Specialist (Acting)

The PSETA

Ground Floor, Woodpecker Building, 177 Dyer Road, Hillcrest Office Park, Pretoria

**No late applications will be accepted**

**No electronic bid applications will be accepted.**

**The validity periods of the bids are 90 days from the closing date.**

Please direct all queries to **Mr. Khutso Moroatshehla** via email on KhutsoM@pseta.org.za

06 November 2026

