**THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE CEF (SOC) LTD WITH AN EXECUTIVE SENIOR WELLNESS AND MEDICAL PROGRAM.**

## 1 BACKGROUND

1.1 The Executive Senior medicals provide structured and comprehensive health assessments that support early detection of chronic and lifestyle-related conditions, promote preventative healthcare, and reduce the risk of sudden illness, long-term absenteeism, and productivity loss. These medicals also encourage a proactive health culture, assisting leaders in managing stress, improving lifestyle habits, and maintaining optimal performance.

1.2 The organisation previously implemented a Medical Programme, with the most recent assessments conducted in 2024. In line with best practice and the organisation's ongoing commitment to employee wellbeing, the continuation of this programme remains essential to safeguarding executive health and sustaining organisational performance.

## 2 SCOPE OF WORK

The appointed service provider shall be responsible for the design, implementation, coordination, and delivery of the Executive Wellness and Medical Programme for 45 delegates for a period of 12 months on a as and when required basis, and must provide all services outlined in Sections 2.1 to 2.6 below.

The programme must offer a comprehensive, structured, and preventative approach to executive health and wellbeing. It supports professionals on a health performance management journey, enabling them to remain engaged, healthy, and productive while proactively managing personal health risks.

The appointed service provider shall provide access to a premium healthcare experience through its Executive Medical Centre at selected regional locations. These facilities must be designed to accommodate executive senior schedules, with full redundancy in power and services to minimise disruptions and avoid appointment cancellations.

The communication strategy must be designed to be effective yet non-intrusive, recognising the time constraints of executive leaders. Programme reporting must include **individual Personal Health Reports issued within 48–72 hours, as well as Group Risk Reports providing aggregated organisational health insights**. All reporting should be conducted in line with confidentiality requirements, ethical standards, and best-practice corporate governance principles.

### 2.1 Core Medical Assessment

- Comprehensive medical and lifestyle evaluations with individual and group-level feedback
- Individual risk stratification to support targeted intervention and informed decision-making
- Standardised and customisable assessments for executive and senior management.

### 2.2 Pre-Assessment: Executive Online Profiling

- Executives must complete a secure online health and lifestyle profile at least 48 hours prior to the medical examination. This ensures practitioners are fully informed before engagement.
- Profiling components should include:
- Personal and family medical history
- Workstyle and lifestyle habits
- Nutritional behaviour assessment
- Depression, stress, and anxiety screening
- Fatigue and sleep disorder assessment
- A fully integrated personal health report must be generated within 48–72 hours after completion of the medical examination.

### 2.3 Personal Pathology

- The service provider should have access to an in-house laboratory service, enabling rapid processing of results and additional testing based on identified risk factors.
- Pathology testing is determined by:
- Core test panels
- Individual risk factors
- Organisational or occupational requirements
- **Key tests include lipid profile, glucose, kidney and liver function, full blood count, PSA, TSH, HIV (optional), and pap smear (where applicable).**

### 2.4 Personal Health Profile and Clinical Screening

#### 2.4.1 Each participant must undergoes a three-stage clinical screening process:

a) Lifestyle and Sensory Screening

- Comprehensive personal and family medical history
- Audio and vision screening
- Basic lung function testing

b) Biokinetic Assessment

- Resting and stress ECG
- Blood pressure monitoring
- $VO_2$ max testing
- Musculoskeletal and postural assessment
- Body composition and flexibility analysis

c)Clinical Review and Examination

- A detailed consultation with a qualified medical practitioner, including lifestyle guidance, health recommendations, and specialist referrals where necessary.

### 2.5 Value-Added Services

- Additional services available must include:
- Reflexology sessions
- Online fitness programmes

- Personal mastery and stress management sessions
- Dietician consultations
- One-on-one health coaching
- Neurozone high-performance development platform

### 2.6 Capacity to Deliver

#### 2.6.1 The programme must be delivered nationally in the following locations:

I. Gauteng
II. KwaZulu-Natal – Durban

## 3 EVALUATION CRITERIA

### 3.1 Phase 1

**Mandatory Requirements**

At this phase, bidder's responses are reviewed against the below Mandatory Requirements. **Failure to comply with any of the Mandatory Requirements will lead to the bidder being disqualified and not be considered for further evaluation on Technical Requirements.**

| MANDATORY REQUIREMENTS | COMPLY | NOT COMPLY |
|---|---|---|
| The bidder must submit a CV of the Clinical Psychologist proving experience of more than 5 years in clinical psychology.<br>**Bidder to submit Clinical Psychologist CV as proof.** | | |
| The bidder must submit proof of registration of the above Clinical Psychologist with The Health Professions Council of South Africa (HPCSA).<br>**Bidder to submit valid proof of registration for the HPCSA.** | | |

### 3.2 Phase 2

**Technical evaluation**

Bidders will be evaluated according to the below technical evaluation criteria. Minimum Technical Threshold is **60%.** It must be noted that if the Bidder does not meet the **60%** minimum threshold, the bidder will be disqualified and not be evaluated further.

**BIDDERS RELEVANT EXPERIENCE**

Details of past projects: The bidder must provide a list of five similar projects relating to the scope of work indicating budget and period that projects took place. The bidder is also expected to attach a **portfolio of evidence**.

| Evaluation Criteria | Document | Score | Weighting % |
|---|---|---|---|
| 5 Projects | List of past projects | 5 | **30%** |
| 4 Projects | | 4 | |
| 3 Projects | | 3 | |
| 2 Projects | | 2 | |
| 1 Projects | | 1 | |
| No Projects | | 0 | |

**CLIENT REFERENCE LETTERS**

The bidder must provide signed and dated relevant reference letters from clients in the past 5 years (**2020-date**).

Reference letters must have the following;

(a). Client's letterhead,
(b). Period of the contract,
(c). Description of services rendered,
(d). Signed by the client,
(e). Client Name, Email address & contact number.

| Evaluation Criteria | Document as Evidence | Score | Weighting % |
|---|---|---|---|
| Bidder submitted 3 or more relevant reference letters | Reference letters with contactable reference details | 5 | **40%** |
| Bidder submitted 2 relevant reference letters | | 3 | |
| Bidder submitted 1 relevant reference letter | | 1 | |
| Bidder did not provide any relevant reference letters | | 0 | |

**PROJECT TEAM**

The following four (4) elements will be considered:

- The bidders' proposed project team must have relevant skills, qualifications, and experience.
- Bidders are requested to clearly indicate the roles and responsibilities of each team member, in relation to the scope of work.
- Bidders' combined number of years of a Team leader & Deputy (relevant experience of more than 10 years) - Proven knowledge and expertise of managing wellness project and providing relevant reports and initiatives. Pre-assessment communication focuses on booking processes, registration, preparation requirements, and logistical information, while post-assessment communication focuses on personal health reports, outcomes planning, follow-ups, and specialist referrals, delivered through agreed one-on-one engagements.

**NB: The bidder must submit structure/composition of team who'll be working on this project.**

| Evaluation Criteria | Document as Evidence | Score | Weighting % |
|---|---|---|---|
| The bidder provided all three (3) elements | Proposal (structure/composition of team) | 5 | **30%** |
| The bidder provided two (2) elements | | 3 | |
| The bidder provided one (1) element | | 1 | |

### 3.3 Phase 3: Commercial evaluation (Price and Specific goals scoring)

| Evaluation Criteria | Final Weighted Scores |
|---|---|
| Price | 80 |
| Specific goals | 20 |
| **TOTAL SCORE:** | **100** |
| | |

A maximum of 20 points will be awarded to a tenderer for specific goals specified for the tender/RFQ as follows:

| Specific goals | Points |
|---|---|
| **Historically disadvantaged individual (HDI)** | |
| Enterprises with ownership of 51% or more by person/s who are black | 10 |
| Enterprises with ownership of 51% or more by person/s who are women | 5 |
| Enterprises with ownership of 51% or more by person/s who are youth | 3 |
| Enterprise with ownership of 10% or more by person/s with disability | 2 |
| **Total** | **20** |

**Tenderer must submit their B-BBEE certificate issued by an authorized body or person or a**

**B-BBEE sworn affidavit to claim preference points.**

- The points scored for the specific goal must be added to the points scored for price and the total must be rounded off to the nearest two decimal places.
- The contract must be awarded to the tenderer scoring the highest points.
- If two or more tenders score an equal total number of points, the contract must be awarded to the tenderer that scored the highest points for specific goals, and if two or more tenderers score equal total points in all respects, the award must be decided by the drawing of lots.