



# **THE NATIONAL CREDIT REGULATOR**

**SEPTEMBER 2015**

## **TERMS OF REFERENCE FOR A SERVICE PROVIDER TO PROVIDE EMPLOYEE WELLNESS PROGRAMME SERVICES TO THE NCR**

**RFQ NUMBER: NCR329/09/15**

<b>DUE DATE: 21 OCTOBER 2015</b>
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**TERMS OF REFERENCE FOR THE APPOINTMENT OF A  
SERVICE PROVIDER TO  
PROVIDE EMPLOYEE WELLNESS PROGRAMME SERVICES**

**1. BACKGROUND**

The National Credit Regulator (NCR) had implemented an Employee Wellness Programme (EWP) over the past years; the benefits of this programme have not been fully realized due to limited scope of the current services. The current Employee Wellness Programme (EWP) services contract expires on the 30 November 2015. It is on this background that a Professional Service Providers (PSP's) need to be appointed, according to their areas of expertise, to ensure that there is a continuation and non-interruption in the provision of this vital and critical service. The required services will be for a period of 3 years (2015 / 2016, 2016/2017 and 2017 / 2018 financial years).

**2. OVERALL OBJECTIVES**

- To increase productivity, heighten morale and teamwork; and strengthen the bonds between management, employees and the organization by providing a sustainable and confidential employee wellness service to all NCR employees.
- To establish and maintain a holistic approach to support employees in managing their personal and social problems.
- To provide employees and their immediate family members with a comprehensive resource to help them address personal problems.
- To provide management with a practical resource to aid in the supporting employees with personal and work-related problems when they impact on an employee's performance.
- To establish and maintain a system through which employees at risk can be identified, motivated and referred for assistance.
- To develop and improve the life skills and promote self empowerment.
- To promote and encourage employee healthy lifestyles.
- To promote work-life balance and maintain a healthy workforce within a supportive environment.

### 3. **SCOPE OF SERVICES**

The scope of services is a comprehensive Employee Wellness Programme consisting of the following core elements:

- **EWP Services** which include counselling services and trauma debriefing to employee's and families in common household.
- **HIV/AIDS Management Program** in partnership with the employee's medical aid provider which includes prevention interventions treatment care and support;
- **Health and Productivity Management** which includes chronic disease management, injury on duty, incapacity, health promotion, awareness and education; and
- **Wellness Management** includes but is not limited to work life balance interventions such as stress management, retirement planning, financial fitness amongst others.
- **Executive Wellness Program**

### 4. **EXPECTED DELIVERABLES**

a. **Implementation of an Employee Wellness Program (EWP) that focuses on the following:**

- Psychological support services in relation to employee's mental, social, physical and spiritual wellbeing, including the provision of counselling services for the employee and their next of kin.
- Personal support for traumatized employees as and when required in cases of personal incidents and accidents related to self or their next of kin.

b. **Development and Implementation of a Health and Productivity Management Program**

- Life threatening disease awareness and management including but not limited to HIV/AIDS, Diabetes, TB, Hypertension and other related chronic diseases.
- Provisioning of annual health screening assessment services for the duration of the contract which include :

- Flu Vaccination
- Voluntary counselling and Testing (VCT)
- Personal Health assessments ( PHA) and Personal Stress assessment (PSA)
- Hypertension (BP monitoring)
- Blood sugar level testing

**c. Development and Implementation of Work Life Balance Program inclusive of:**

Life skills program that includes:

- Financial fitness
- Retirement planning
- Stress management.

**d. Management Training**

- Training of managers on EWP case referral and management
- Management support services through management systems on Absenteeism and leave management.

**e. Executive Wellness Program**

**5. REPORTING**

- Monthly reports on all programmes
- Statistical analysis, interpretation and recommendation for action
- Quarterly report on all programmes
- Annual report on all programmes

**6. CLIENTS**

- The programme is aimed at servicing NCR employees

**7. SPECIFIC REQUIREMENTS**

Proposals must state how the following will be managed:

- Language
- Face to face consultation with clients in the urban and remote areas
- Confidentiality

## 8. THE FUNCTIONALITY CRITERIA

COMPANY PROFILE/ EXPERTISE AND FUNCTIONALITY	WEIGHT
<ul style="list-style-type: none"> <li>• Is the bidder in the industry relevant to the NCR 's requirements ( Employee Wellness Programme)</li> <li>• Does the bidder provide references, previous report for the same service provided?</li> <li>• Does the bidder have relevant experience in providing similar service?</li> </ul> <p>a. References</p> <p>b. Experience and Skills</p> <p>c. Previous report for the assignment or consultancy which was carried out</p> <p>d. Company Structure, Leading/management Staff CV's and Qualifications</p>	30
ADMINISTRATION AND CONSULTATION	WEIGHT
<ul style="list-style-type: none"> <li>• Does the Draft Work Plan describe the plan for administration/ consultant/ inspection/ training facilitator/ telephone assistance or advice and annual assessment?</li> <li>• Is the plan acceptable?</li> <li>• Does the Draft Work Plan describe a record keeping and reporting system, and is the system acceptable?</li> </ul> <p>a. Description of Personnel (consultant/inspection/ training facilitator/ telephone assistance/ annual assessment)</p> <p>b. Training Plan</p> <p>c. Administration and Consultation</p>	30

d. Record Keeping and Reporting System	
<b>CAPACITY TO DELIVER</b>	<b>WEIGHT</b>
Does the draft Work proposal contain information on the capacity and delivery?  a. Tender's Methodology and Approach Proposal for project implementation b. Tender's Project Management Plan submitted c. Proposed reporting / communication with the NCR	<b>30</b>

Bidders are required to score a minimum of 70% points on functionality to qualify to be evaluated in the next level (BBBEE and price). Bidders who do not score the minimum of 70% points on functionality will be disqualified and not be evaluated on price and BBBEE.

## 9. ADDITIONAL INFORMATION

- Brief company profile, as relevant to the above mentioned terms of reference
- Experience in the relevant areas
- Clientele
- A proposal including methodology
- Certification of all team members, highlighting experience relevant to this exercise. Confirmation that the proposed team members will in fact be available to undertake this exercise at the appropriate time and meet the necessary deadlines
- The proposal should contain a work plan, showing tasks, timelines etc.
- Contact details of at least two references from amongst recent clients with whom similar work has been conducted in the past 6 Months
- Certificate of incorporation / legal status
- Financial proposal