

## REQUEST FOR PROPOSALS

### BID DESCRIPTION:

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT MEMBER WELLNESS CENTRE SURVEY FOR A PERIOD OF SIX (6) MONTHS

### BID NUMBER:

POLMED006/2023/WELLNESSMEMBERSURVEY

### COMPULSORY BRIEFING DATE

17 OCTOBER 2023 AT 15H00 (VIRTUAL)

### CLOSING DATE:

25 OCTOBER 2023 AT 12H00



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## GLOSSARY

Abbreviation	Description
Administrator	The Administrator of the Scheme as envisaged in the Medical Scheme Act.
Authorised representative	Person/ legal entity authorised by the Board of Trustees or by its delegate, the POLMED Officer of POLMED, to represent POLMED from time to time.
Award	Conclusion of the procurement process and final notification to this effect to the successful Bidder.
B-BBEE	Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003) and the Codes of Good Practice issued there under by the Department of Trade and Industry.
Bid	A written offer on the official bid documents and in a prescribed or stipulated form in response to an invitation by POLMED for the provision of services, works or goods.
Bidder	Entity/joint venture/consortium responding to the Request for Proposals.
Board of Trustees	The duly elected and appointed Board of Trustees of POLMED.
CMS/ Council	The Council for Medical Schemes established in terms of section 3 of the Medical Schemes Act.
CoGP	The Department of Trade and Industry B-BBEE Codes of Good Practice.
Contracting Entity/ Contractor	Contracting entity with whom POLMED will conclude a formal contract and service level agreement subsequent to the final award of the contract based on this Request for Bid.
DTI	Department of Trade and Industry.
EME	Exempted Micro Enterprise in terms of the Codes of Good Practice.
IP	Intellectual Property.

Medical Schemes Act	The Medical Schemes Act, Act No 131 of 1998, and any regulations published in terms thereof.
Member	Any person who is enrolled as a Member of the Scheme and who is a member in terms of the Rules and shall be deemed to include the registered dependents of a Member.
Original bid	Original document signed in ink by the person duly authorised to commit the Bidder. Copies of original document signed in ink by the person duly authorised to commit the Bidder.
PO	Principal Officer.
POLMED	The South African Police Service Medical Scheme being a medical scheme registered under the Medical Schemes Act, 1998 (referred to as the Scheme).
QSE	Qualifying Small Enterprise in terms of the codes of good practice.
RFP	Request for Proposals.
Rules	The registered Rules of the Scheme as defined in terms of the Medical Schemes Act.
SCM	Supply Chain Management.
ToR	Terms of Reference.
Trustees	The members of the Board of Trustees of the Scheme, as constituted in terms of the Rules to manage the Scheme.
Valid document	A document containing authentic information conforming to legally binding status and is enforceable by the executing authority on the bidding authority whether in an original, copied, reproduced, photo, faxed or in electronic format and that has bearing to transaction(s) with POLMED. Such submission must be valid at the closing date and time of submission.
Will be deemed non-responsive.	Bidder will immediately be excluded from further evaluation.

## 1. GENERAL TERMS AND CONDITIONS OF THE BID

### 1.1. FRAUD AND CORRUPTION

All Bidders are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

### 1.2. BRIEFING SESSION

A mandatory virtual briefing will be held for this bid on 17 October 2023 at 15h00. Service Providers must request for the details of the meeting link through [procurement@polmed.co.za](mailto:procurement@polmed.co.za).

### 1.3. CLARIFICATIONS AND QUERIES

Telephonic requests for clarification will not be accepted. Any clarification required by a bidder regarding the meaning or interpretation of any part of the Terms of Reference or any other aspect concerning the RFQ, is to be requested in writing (e-mail) from [procurement@polmed.co.za](mailto:procurement@polmed.co.za). The RFQ number must be mentioned in all correspondence.

### 1.4. SUBMISSION OF RESPONSES

Responses to the RFP document must be submitted in the following manner:

#### **Hard Copies Submissions**

The tender box is situated at the reception of the POLMED head office:

Crestway Office Park

Block A, 20 Hotel Street

Persequor Park

Lynnwood

Pretoria

For purposes of this RFQ, bids submitted via facsimile will not be considered.

The two (2) envelope system will be followed. One (1) original and one (1) copy of both the technical and financial bid must be submitted in a sealed envelope/pack. The technical and financial bids must be submitted in separate envelopes. A total of six (6) documents must be submitted. Bidders must indicate on the cover of each document whether it is the original or a copy of the submission.

All bids must be submitted together with an **electronic copy (Memory Stick/USB)** of the entire bid in the format prescribed in section 1.4. the bid document.

**Failure to submit an electronic copy of the bid will lead to the bid being non-responsive and will be disqualified.**

Bids should be submitted in a sealed envelope/ pack, marked with:

- RFP number: POLMED006/2023/MEMBERSURVEY
- Closing date and time: 25 October 2023
- The name and address of the bidder.
- Indication if the envelope/ pack relates to the technical or financial response.

#### **Electronic Bid Submissions**

**Failure to comply to the following electronic submission format will invalidate the bid** by the closing date and time to [procurement@polmed.co.za](mailto:procurement@polmed.co.za):

- Part 1 - Administrative Documents
- Part 2 - Technical Proposal
- Part 3 - Pricing and B-BBEE Information

The reference number of the bid must be clearly indicated in the subject line.

All bids submitted to POLMED will become the property of POLMED and will as such shall not be returned to the bidder. POLMED will maintain all reasonable efforts to maintain bids in confidence. Proprietary information should be indicated as such in each bid.

#### **1.5. LATE SUBMISSIONS**

Bids received late will not be considered. A bid will be considered late if it arrived one (1) second after 12:00PM or any time thereafter. The tender box shall be locked at exactly 12:00PM and bids arriving late will not be considered under any circumstances.

The official Telkom time (Dial 1026) will be used to verify the exact closing time.

Bids received late shall be returned unopened, where possible, to the bidder. Bidders are therefore strongly advised to ensure that bids be dispatched allowing enough time for any unforeseen events that may delay the delivery of the bid.

#### **1.6. FORMAT OF THE TECHNICAL BID**

Submissions by Bidders must be in the following format:

- A: Executive Summary.
- B: Company Profile, Capacity and Geographical Footprint
- C: Company Competency and Expertise
- D: Methodology and Approach

- E: Team Competency and Experience, including CVs and Qualifications
- F: Financial Soundness (Financial Statements)
- G: Investigation by Regulatory Bodies
- H: Client References (Contactable)

**1.7. VALIDITY OF THE BID**

The functional and financial bids must be valid for a period of 90 days from the closing date of this RFQ.

**1.8. DURATION OF APPOINTMENT**

The term of the contract will be for a period of six (6) months. POLMED reserves the right to terminate the contract of the service provider on the basis of poor performance, giving the service provider sufficient prior notice thereof in writing.

**1.9. NEGOTIATING AND CONTRACTUAL OBLIGATIONS**

A bid will constitute a binding offer, but such offer will be deemed not to have been accepted, unless and until a definitive contractual agreement and other related documents are concluded between POLMED and the preferred bidder.

POLMED or its authorised representatives have the right to enter into negotiation with one (1) or more bidders regarding any terms and conditions, including price(s), of a proposed contract.

POLMED shall not be obliged to accept the lowest bid price.

POLMED reserves the right to select another Preferred Bidder in the event that negotiations with the originally selected Preferred Bidder prove unsuccessful and/or unduly delayed.

Upon final selection and notification of the Preferred Bidder, a process of final negotiations will commence. Negotiations will be used to finalise outstanding elements of the SLA in an effort to arrive at a comprehensive binding SLA that will govern the relationship between POLMED and the Successful Bidder.

Under no circumstances will negotiation with any Bidders, including with preferred Bidders, constitute an award or promise/ undertaking to award the contract or be construed as legitimate expectations by such Bidder.

**1.10. BIDDER SELECTION**

POLMED reserves the right to select the appropriate service provider based on its requirements.

**1.11. ACCESS TO INFORMATION**

All Bidders will be informed of the status of their bid once the procurement process has been completed. Requests for information regarding the RFQ process will be dealt with in line with the POLMED SCM Policy and other relevant applicable legislation in terms of access to information.

**1.12. BIDDER ENQUIRIES**

All technical and Supply Chain-related enquiries must be sent in writing to [procurement@polmed.co.za](mailto:procurement@polmed.co.za). The RFQ number must be mentioned in all correspondence.

**1.13. REASONS FOR REJECTION**

POLMED shall reject a bid for the award of a contract if the recommended Bidder is suspected of fraud or improper conduct or has committed a proven corrupt or fraudulent act in competing for the particular contract.

POLMED may disregard the bid of any Bidder if that Bidder, or any of its directors:

- Have abused the Supply Chain Management (SCM) system of POLMED.
- Are suspected of or have committed proven fraud or any other improper conduct in relation to such system.
- Have failed to perform on any previous contract.
- In case of collusive tendering by the Bidders or any anti-competitive conduct as determined in terms of the Competition Act, 89 of 1998.
- In case a Bidder, a member of the Bidder, has interest {directly or indirectly) in any other Bidder.



**1.14. CANCELLATION OF PROCUREMENT PROCESS**

POLMED reserves the right to amend, modify or withdraw this RFQ or amend, modify or terminate any of the procedures or requirements set out herein at any time and from time to time, without prior notice and without liability to compensate or reimburse any person.

**1.15. ADMINISTRATIVE REQUIREMENTS**

Bids submitted by potential service providers must include at least the following mandatory documentation/ information:

- Company registration and shareholding information to support the B-BBEE contribution certificate.
- Valid, original tax clearance certificate or equivalent.
- B-BBEE status level of contribution certification or sworn affidavit.
- Audited or independently reviewed annual financial statements covering 3 financial year ends.
- Declaration of interest.
- Declaration of bidder's past SCM practices.
- Investigation by regulatory bodies.
- Proof of minimum 3 years consecutive experience in the relevant field.
- Signature by a duly authorized representative of the bidder and all pages of the bid documents initialled for correctness.

**1.16. COMPANY REGISTRATION AND SHAREHOLDING INFORMATION**

The Bidder must be a South African entity and must submit its company registration details and documentation. Bids submitted without a company registration document will be deemed to be non-responsive.

**1.17. VALID, ORIGINAL TAX CLEARANCE CERTIFICATE**

A valid SARS Tax Clearance Certificate must accompany the bid and must be valid at the date of closing of the RFQ. In case of a consortium/ joint venture, a valid SARS Tax Clearance Certificate for each consortium/ joint venture member must be submitted.

The following options will be regarded as a valid tax clearance certificate:

- A valid original tax clearance pin certificate printed directly by SARS; or
- A valid tax clearance certificate mailed to the relevant party to the bid and thus printed by the party to the bid and which is accompanied by a PIN through which POLMED may confirm the validity of the certificate on the closing date of the bid. Failing to provide a PIN will lead to the verification being done at a later stage which would require that the party to the bid's tax compliance status be measured after the closing date and must be in

order on date of measurement.

- Where no valid tax clearance exists for any party noted above, a letter from SARS needs to be provided for that party, indicating that satisfactory arrangements have been made with SARS to meet the party's tax obligations.

Bids submitted without a valid original tax clearance certificate or proof of arrangements made with SARS for each party to the bid will be deemed to be non-responsive.

#### **1.18. 8-BBEE STATUS LEVEL**

The proof pertaining to the bidder's level contributor status or sworn affidavit should be provided. Information is available at [www.dti.gov.za](http://www.dti.gov.za).

Failure to provide the B-BBEE Certification **will lead** to the bid being regarded as **non-responsive**.

#### **1.19. DECLARATION OF INTEREST**

The bidder must complete and return the "Declaration of Interest" on behalf of all parties to the bid.

The bidder must fully declare all co-administration or sub-contracting arrangements/ agreements/ financial interest between the organisation and other entities, including POLMED and its service providers.

Irrespective of the "Declaration of Interest" form, the bidder must submit a full declaration of relationships between the bidder and other service providers in the healthcare industry (including POLMED). If no such relationships exist, the bidder must indicate this in their submission in terms of this requirement.

Bids submitted without a completed and signed Declaration of Interest will be deemed to be non-responsive.

#### **1.20. DECLARATION OF BIDDER'S PAST SCM PRACTICES**

The bidder must complete and return the "Declaration of bidder's past Supply Chain Management practices" on behalf of all parties to the bid.

Bids submitted without a completed and signed "Declaration of bidder's past Supply Chain Management practices" form may be deemed to be non-responsive.

#### **1.21. INVESTIGATIONS BY REGULATORY BODIES**

The bidder is to confirm that it is not being investigated by any regulatory bodies irrespective of the nature of the investigation. If it is being investigated, the respective details are to be supplied as part of this submission.

**1.22. SIGNATORY BY DULY AUTHORISED REPRESENTATIVE**

Bidders must provide proof that the individual signing the bid documents are duly authorised to sign the bid, i.e., a resolution of directors, etc. should be provided.







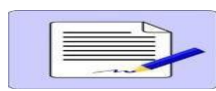
**1.23. FINANCIAL SOUNDNESS**

All bidders must submit audited financial statements financial statements.

Bids submitted without the required proof of financial soundness for the contracting entity will be deemed to be non-responsive.

**1.24. EVALUATION PROCESS**

Evaluation of the responses from the Bidders will be done in a phased approach as per the below criteria:

Stage 1	Stage 2	Stage 3	Award
<p>ADMINISTRATIVE COMPLIANCE</p>  <p>RETURNABLE DOCUMENTS</p> 	<p>TECHNICAL EVALUATION</p>  <p>80% MINIMUM THRESHOLD</p> 	<p>PRICE &amp; B-BBEE EVALUATION</p> <div style="border: 1px solid blue; border-radius: 10px; padding: 5px; width: fit-content; margin: 10px auto;"> <p>Price = 80 B-BBEE = 20</p> </div> <p>WEIGHTED SCORING / 100</p> 	<p>FINAL AWARD</p> <p>Post tender negotiation (if applicable) requesting best &amp; final offer.</p>  <p>Negotiation of final terms &amp; conditions of contract.</p> 

**GATE 1 – ADMINISTRATIVE DOCUMENTS AND COMPLIANCE**

**2. ADMINISTRATIVE COMPLIANCE**

Refer to the checklist for a summary of the compulsory documentation and information. All bid documents must be completed and signed by the duly authorised representative of the Bidder. During this phase Bidders’ responses will be evaluated based on compliance with the listed administration and mandatory bid requirements. The Bidder’s bid will be disqualified for non-submission of any of the documents.

## STANDARD BID DOCUMENTS

### Invitation to bid

YOU ARE HEREBY INVITED TO RESPOND TO A BID OF POLMED					
<b>BID NUMBER</b>	POLMED006/2023/WELLNESSMEMBER SURVEY	<b>CLOSING DATE</b>	25 October 2023	<b>CLOSING TIME</b>	12:00
<b>DESCRIPTION</b>	Request for Proposals for appointment of a service provider to conduct a member wellness centre survey for a period of six (6) months.				
<b>VALIDITY</b>	90 Days				
The successful Bidder will be required to fill in and sign a written Formal Contract and SLA.					
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT:</b>					
Crestway Office Park Block A, 20 Hotel Street Persequor Park Lynnwood Pretoria					
No posted OR faxed Bids will be accepted					
Bidders should ensure that bids are delivered before the closing date and time to the correct physical address and email address. Submission of late bids will not be accepted. Bids can be delivered and deposited into the tender box between 08:00 and 16:30, Mondays to Fridays prior to the closing date and between 08:00 and 11:00 on the closing date. All bids must be submitted on the official bid forms (not to be re-typed).					
<b>TECHNICAL AND SUPPLY CHAIN ENQUIRIES MAY BE DIRECTED VIA EMAIL TO</b>					
<b>E-MAIL ADDRESS</b>	procurement@polmed.co.za				

SUPPLIER INFORMATION			
NAME OF BIDDER			
POSTAL ADDRESS			
STREET ADDRESS			
TELEPHONE NUMBER	CODE		NUMBER
CELLPHONE NUMBER			
FACSIMILE NUMBER	CODE		NUMBER
E-MAIL ADDRESS			
COMPANY REGISTRATION NUMBER			
INCOME TAX REFERENCE NUMBER			
COMPANY PAYE NUMBER			
COMPANY UIF NUMBER			
VAT REGISTRATION NUMBER			
TAX CLEARANCE CERTIFICATE/ TAX COMPLIANCE SYSTEM PIN SUBMITTED	TICK APPLICABLE BOX <input type="checkbox"/> Yes <input type="checkbox"/> No <i>PROOF MUST BE SUBMITTED</i>		
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ B-BBEE STATUS LEVEL SWORN AFFIDAVIT	TICK APPLICABLE BOX <input type="checkbox"/> Yes <input type="checkbox"/> No <i>A B-BBEE STATUS LEVEL VER/FICATION CERT/FICATEI SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED</i>		
POLMED DOMICILLIUM			

DECLARATION	
I/ We have examined the information provided in your bid documents and offer to undertake the work prescribed in accordance with the requirements as set out in the bid document. The prices quoted in this bid are valid for the stipulated period. We confirm that this bid will remain binding upon us and may be accepted by you at any time before the expiry date.	
Signature of the bidder	
Position	
Date	
Duly authorised to commit the Bidder	TICK APPLICABLE BOX <input type="checkbox"/> Yes <input type="checkbox"/> No <i>PROOF MUST BE SUBMITTED</i>

**ii) TAX COMPLIANCE REQUIREMENTS**

It is a condition of this bid that the taxes of the successful Bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Services (SARS) to meet the Bidder's tax obligations.

Bidders are required to submit their Unique Personal Identification Number (PIN) issued by SARS to enable POLMED to view the Bidders profile and tax status.

Application for tax compliance status (TCS) or PIN may also be made via e-filing. In order to use this provision, taxpayers will need to register with SARS e-filing through the website [www.sars.co.za](http://www.sars.co.za).

Bidders may also submit a printed Tax Clearance Certificate or Tax Clearance Status.

In bids where consortia/ joint ventures/ sub-contractors are involved; each party must submit a separate Tax Clearance Certificate or proof of Tax Clearance Status/ **PIN**.

**iii) DECLARATION OF INTEREST**

Any legal person, including persons employed by POLMED, or persons having a kinship with persons employed by POLMED, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by POLMED, or to persons connected with or related to them, it is required that the Bidder or his/her authorised representative declare his/her position in

relation to the evaluating/adjudicating authority and/or take an oath declaring his/her interest, where:

- the Bidder is employed by POLMED; and/or
- the Bidder is a management Board of Trustees member; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

1. Are you or any person connected with the Bidder, employed by POLMED?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, provide particulars:		
2. Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by POLMED and who may be involved with the evaluation and or adjudication of this bid?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, provide particulars:		

3. Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by POLMED who may be involved with the evaluation and or adjudication of this bid?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, provide particulars:		
4. Do you or any of the directors/ trustees/ shareholders/ members of the company have any interest in any other related companies whether or not they are bidding for this contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so, provide particulars:		

DECLARATION	
I, the undersigned (name).....,..... certify that the information furnished above is correct. I accept that POLMED may reject the bid or act against me should this declaration prove to be false.	
Name of Bidder	
Signature	
Position	
Date	

**(iv) DECLARATION OF INTEREST**

This declaration will be used by institutions to ensure that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.

The bid of any Bidder may be disregarded if that Bidder, or any of its directors have:

- a. abused POLMED's supply chain management system.
- b. committed fraud or any other improper conduct in relation to such system; or
- c. failed to perform on any previous contract.



In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

<p>1. Is the Bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector?  (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the audi alteram partem rule was applied).</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p>If so, provide particulars:</p>		
<p>2. Is the Bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?  To access the Register, enter the National Treasury's website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number 012-3265445.</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p>If so, provide particulars:</p>		

<b>3. Was the Bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five (5) years?</b>	<b>Yes</b> <input type="checkbox"/>	<b>No</b> <input type="checkbox"/>
<b>If so, provide particulars:</b>		
<b>4. Was any contract between the Bidder and any organ of state or private entity terminated during the past five (5) years on account of failure to perform on or comply with the contract?</b>	<b>Yes</b> <input type="checkbox"/>	<b>No</b> <input type="checkbox"/>
<b>If so, provide particulars:</b>		

<b>DECLARATION</b>	
<p>I, the undersigned (name)....., .....certify that the information furnished above is correct. I accept that POLMED may reject the bid or act against me should this declaration prove to be false.</p>	
<b>Name of Bidder</b>	
<b>Signature</b>	
<b>Position</b>	
<b>Date</b>	

**iv) SUB-CONTRACTING**

Will any portion of the contract be sub-contracted?

*(Tick applicable box)*

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

If yes, indicate:

- I. What percentage of the contract will be sub-contracted?  
.....%
- II. The name of the sub-contractor(s)
- III. The B-BBEE status level of the sub-contractor(s)

The Service Provider may use subcontractors in connection with the work performed under this Agreement. When using subcontractors, however, if not listed in the proposal at the time of selection, the Service Provider must obtain prior written approval from POLMED. In using subcontractors, the Service Provider is responsible for all their acts and omissions to the same extent as if the subcontractor and its employees were employees of the Main Contractor. All requirements set forth as part of the bid will be applicable to all subcontractors and their employees to the same extent as if the Main Contractor and its employees had performed the services.

## **TERMS OF REFERENCE - WELLNESS CENTRE MEMBER SURVEY RESEARCH SERVICES**

### **1. PURPOSE OF THE RFP**

1.1. POLMED wishes to invite qualified suitable Service Provider for research services, i.e., conducting a survey to assess the members' appetite and demand for accessing preventative and screening benefits via proposed Wellness centers with a national footprint.

### **2. BACKGROUND ON POLMED**

2.1. POLMED was formed to cater for the Medical Scheme needs of the South African Police Service (SAPS) members appointed under the South African Police Act, 1995 (Act No. 68 of 1995) (SAPS Act). The Scheme is a non-profit restricted medical scheme registered in terms of the Medical Schemes Act, 1998 (Act No. 131 of 1998) (MS Act) and its Rules are registered with the Council for Medical Schemes in terms of the said Act.

2.2. The duties and responsibilities of the Board of Trustees are regulated by the Rules of the Scheme and the MS Act, as amended. The Board of Trustees has several Board Committees that are designed to allow every Trustee to play a role in governance of the Scheme. These Committees have their own Chairpersons and meet on a frequent basis to deal with issues that are relevant to them and issues that have been delegated to them by the Board. Trustees have the responsibility of looking after the Scheme's funds on behalf of members.

2.3. POLMED is transitioning from an insurance type model (reactive not proactive, i.e., action is taken once the member presents with a condition) to a wellness and preventative care model.

2.4. Previously most of POLMED's focus has been on curative and diagnostic interventions, rather than prevention and overall member wellness. This has led to an increase in healthcare expenditure, especially hospicentric patient management.

2.5. The new strategy that POLMED will be rolling out over the next few years will focus on preventative measures, including expanding the non-healthcare component where more focus will be directed to overall member wellness, by addressing members' mental, physical and emotional wellbeing.

**2.6.** POLMED has identified the following services to be essential for an effective wellness model of care:

**2.6.1. Preventative and screening benefits, including annual Health Risk Assessments.**

**2.6.2. Health support:**

- a) Early detection and screening via questionnaires.
- b) Coping skills development training.
- c) Focus on overall wellness and life coaching skills.
- d) Provision of Debriefing services to the highest at-risk occupational categories within SAPS

**2.6.3. Coordinated healthcare and collaboration with the SAPS' Employee Health and Wellness services, i.e.**

- a) Pre-Employment medical examinations
- b) Pre-Deployment medical examinations
- c) Medical surveillance as part of SHE management
- d) Clinical assessments of Incapacity leave requests.

**2.7.** To this effect, POLMED would like to determine, based on sound research, the most desirable mode and point to access services.

**2.8. The four proposals for Wellness centers are:**

**2.8.1.** Making use of existing facilities and programs within POLMED's current hospital networks.

- a) All the above-mentioned services will be available at these Wellness centres.

**2.8.2. Mobile Wellness centers**

- a) All the above-mentioned services will be available at these Mobile Wellness centres which will have a roster for visiting different police stations.

**2.8.3.** Wellness booths situated at some peripheral police stations, where members from other police stations could visit or conduct virtual consultations in order to access services.

- a) Virtual consultations plus health risk assessment questionnaires will be available at the Wellness booths.
- b) Virtual Debriefing services will also be available at the Wellness booths.

- c) Patients at risk will be identified and referred/escalated for further management by professional healthcare providers.

#### **2.8.4. Toll Free Helpline services**

- a) 24/7 help line support to members who are in dire need for debriefing and or general mental health support.

**2.9.** To this effect, POLMED would like to determine, based on sound research, which model or combination of models, is most preferred by members to access the above-mentioned services.

### **3. OBJECTIVES AND MINIMUM SERVICE LEVEL REQUIREMENTS**

The purpose of this research is to:

- a) determine if there is a demand from members to access the preventative and screening benefits via proposed Wellness centres.
- b) Determine which of the proposed Wellness centres members would prefer to access their preventative and screening benefits at.

**3.1.** The ultimate objective of the Research Services is to provide POLMED's Board of Trustees with sound research results which will enable the development of a program whereby members can access the above-mentioned services and Benefits at well positioned Wellness centres nationally.

### **4. SCOPE OF WORK**

**4.1.** In order for the Service Provider to achieve the research objectives, the Service Provider will be given the Customer's Member database for the provision of the Research Services.

**4.2.** It is expected that the survey will be conducted in English.

**4.3.** Embedded Members' Data, including, inter alia, demographic, and geographic information for purposes of text piping, during which process the Survey is personalised for a specific Member, filtering, quota-sampling, online reporting, and analysis.

**4.4.** The importation of the Surveys into an electronic interview facilitation and survey management tool to facilitate the efficient interview processes and enables data to be captured accurately and stored securely.

#### **4.5. SAMPLING**

- 4.5.1. The Service Provider must determine a sampling methodology which must amongst others, consist of various sub-samples of active South African Police Service (SAPS) members.

4.5.2. The Service Provider must assess the interviewed Member's profile, taking into consideration their demographics and various other characteristics, in order to draw a random sample that is representative of active South African Police Service (SAPS) members profile as detailed below.

a) **Salary level / Rank**

<b>Rank</b>	<b>Number</b>
General	1
Lieutenant General	27
Major General	151
Brigadier	616
Colonel	2351
Lieutenant Colonel	5849
Captain	11932
Warrant Officer	27415
Sergeant	56077
Constable	44783
Total	149202

b) **Gender**

<b>Gender</b>	<b>Number</b>
Male	100465
Female	48737
Total	149202

c) **Age**

<b>Age Range (Years)</b>	<b>Number</b>
0-19	138
20-24	3881
25-29	13500

<b>Age Range (Years)</b>	<b>Number</b>
30-34	18107
35-39	24575
40-44	33384
45-49	23371
50-54	18876
55-59	13183
60-64	185
65+	2
<b>Total</b>	<b>149202</b>

**d) Race**

<b>Race</b>	<b>Number</b>
White	11162
Indian	3446
Coloured	16325
African	118269
<b>Total</b>	<b>149202</b>

**e) Geographical placement**

Please note that the Tshwane headquarters is considered as a province.

<b>Province</b>	<b>Number</b>
Western Cape	20658
Eastern Cape	17253
Northern Cape	7028
Free State	10568
KwaZulu Natal	23969
North West	8878



<b>Province</b>	<b>Number</b>
Mpumalanga	<b>9955</b>
Limpopo	<b>10942</b>
Gauteng	<b>34220</b>
Tshwane Head Office	<b>5731</b>
<b>Total</b>	<b>149202</b>

#### **4.6. DELIVERABLES**

The Service Provider will be expected to deliver on the below deliverables:

- a) The Survey, including its development into the electronic interview facilitation and survey management tool.
- b) The provision of status updates to the Customer upon the completion of successful interviews.
- c) The processing of Members' Data and the capturing of Survey results.
- d) The application of statistical modelling and analysis.
- e) The interpretive reporting of Survey results and the provision of strategic insights.
- f) The provision of a report in full and in PowerPoint format ("the Report"), which Report will comprise of:
  - i. A consolidated graphic image of the Survey results.
  - ii. Individual reports per SAPS demographic category and rank.
  - iii. The presentation of the Report in a workshop environment to **POLMED** Executive Management.

#### **4.7. REQUIRED ATTRIBUTES AND REQUIREMENTS**

4.7.1. The following attributes, among others, will be considered by **POLMED**:

- a) Understanding of the Medical Schemes industry and methodology to be applied in conducting the survey.
- b) Conformance to exceptional quality and standard of work, and meticulous attention to detail; and fast turnaround time and ability to adapt quickly.
- c) Proven track record in the provision of required services (A minimum of three reference letters to be submitted).
- d) Project Management Skills.
- e) In-depth Research experience including conducting surveys in a

- complex environment.
- f) Necessary acumen and logistics to provide services.
- g) Company profile.
- h) Names, Designations and experience of personnel to be deployed on the project- detailed CV's and credentials to be provided.

**GATE 2: TECHNICAL EVALUATION**

**5. EVALUATION PROCESS**

Bids will be evaluated on functionally as per the evaluation criteria and weights in the table shown below.

<b>No</b>	<b>Technical Requirements</b>	<b>Allocated weighting</b>
<b>1.</b>	<b>Capability and Capacity to deliver on the Project</b>	<b>50</b>
1.2	Expertise: Staffing Structure, Qualifications and Experience of the proposed team to complete assignment	<b>20</b>
1.3	Experience in conducting member surveys of the proposed team to complete assignment	<b>30</b>
<b>2.</b>	<b>Methodology and Implementation approach proposed</b>	<b>30</b>
<b>2.1</b>	Detailed Project plan and methodology to be applied in order to achieve deliverables	<b>20</b>
<b>2.2</b>	Work Plan and mapping of all stakeholders in relation to the scope of work	<b>10</b>
<b>3.</b>	<b>Innovation and Value-Added Services</b>	<b>20</b>
<b>3.1</b>	Inclusion of practical and actionable value-added services to be applied on the survey.	<b>15</b>
<b>4.</b>	<b>Client References (contactable)</b>	<b>5</b>
<b>5</b>	<b>TOTAL</b>	<b>100 POINTS</b>

**5.1. TECHNICAL EVALUATION MINIMUM THRESHOLD**

- 5.1.1. Service Providers will be required to meet a minimum threshold of **80% on technical evaluation** to proceed to Gate 3, i.e., Price and B- BBEE Evaluation.

### GATE 3: PRICING AND B-BBEE EVALUATION

#### 5.2. POINTS FOR PRICE

- 5.2.1. Bidders are required to include in their responses, fee proposals in respect of the amount and nature of their expected remuneration for the services to be provided by them. In this regard, Bidders are to indicate specific billing arrangements, hourly rates per professional level, details of any proposed discounts and whether the rates are negotiable.
- 5.2.2. Only Bidders that have achieved a minimum score of 80 points on technical evaluation will be evaluated on price and B-BBEE.
- 5.2.3. The percentage scored for price shall be calculated by applying the undermentioned formula:

$$P_s = 80(1 - (P_t - P_{min})/P_{min})$$

Where,

- i)  $P_s$ : percentage scored for price under consideration
  - ii)  $P_{min}$ : lowest acceptable price
  - iii)  $P_t$ : price under consideration
  - iv) 80: percentage/weight allocated for price
- 5.2.4. The lowest acceptable bid will obtain the maximum percentage allocated for the price/ price component. The other bids with higher prices for the price component, will proportionately obtain lower percentages based on the above indicate formula.
- 5.2.5. POLMED shall not be obliged to accept the lowest price bid.

**6. PRICING SCHEDULE**

6.1. Service Providers must quote for the purpose of bid evaluation, the fee must be based on a maximum of 600 hours for duration of the project duration.

YOU ARE HEREBY INVITED TO RESPOND TO A BID OF POLMED	
<b>BID NUMBER</b>	POLMED006/2023/WELLNESSMEMBERSURVEY
<b>DESCRIPTION</b>	Request for Proposals for appointment of a service provider to conduct member wellness center survey
<b>VALIDITY</b>	90 DAYS

Item	Description	Price in RSA Currency
1.	Research Activities and including questionnaire development	
2.	Management of the survey	
3.	Analysis of the member survey results	
4.	Reporting and engagement activities	
<b>TOTAL COST EXCLUDING VAT</b>		<b>R..... (Total inclusive of all costs)</b>
<b>VAT@15%</b>		
<b>TOTAL INCLUDING VAT</b>		
3.	Persons who will be involved in the project and hourly rates applicable	
	<b>Person and Position</b>	<b>Hourly Rate in RSA Currency</b>

4	Other Costs - Please specify the details:			
5	Travel expenses (specify, for example, rate/km and total km, class of air travel, etc.) Only actual costs incurred are recoverable. Proof of the expenses incurred must accompany certified invoices.			
	<b>Description of expense</b>	<b>Rate</b>	<b>Quantity</b>	<b>Amount</b>
	<b>Total Inclusive of VAT</b>			

## 7. B-BBEE STATUS

The proof pertaining to the bidder's level contributor status in terms of the B- **BBEE** Act and the Codes of Good Practice, issued by the dti 11 October 2013, as amended, will be evaluated. Information is available at [www.dti.gov.za](http://www.dti.gov.za).

The bidder will be allowed to score up to a maximum of 20 points depending on the bidder's level contributor status as per the **POLMED B-BBEE** Contributor level scorecard.

The following table will be used to allocate points for **B-BBEE** where the 80/20 for all Request for Quotations requests.

B-BBEE Status Level Contributor	Points allocated for B-BBEE Level Contributor
1	10
2	8
3	6
4	4
5 - 6	2
6	2
7, 8 and Non-Compliant	0

The remaining ten (10) will be allocated for **B-BBEE** bonus points as follows:

An <b>EME</b> or QSE which is at least 51% black owned	5 Points
An <b>EME</b> or QSE which is at least 31% black owned by women	5 Points

## 8. ADJUDICATION OF THE BID

The scores received for functionality, price and **B-BBEE** will be added together to obtain a final score for the Bidder. The Tender Evaluation Committee will make its recommendation to the Tender Adjudication Committee on the final score received by each Bidder.

**POLMED** reserves the right to award the contract to one **(1)** or more service provider or not to award the contract at all.