



International  
**Wellbeing** Insights  
People, Culture & Wellbeing

# Creating an Effective Wellbeing Tender

Taking you from distress to de-stress



DIAGNOSE



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# Creating an effective wellbeing & stress management tender

## What is a tender?

A Tender, Request for Proposal (RFP) or Request for Quotation (RFQ) is a written invitation to potential vendors for a service or product. The vendor is required to provide relevant information about their service or product which will then be compared against other proposals received. A decision will then be made by the vendee based on their specific requirements and objectives utilising a transparent method.

## Before you create your tender

Before you create your wellbeing tender there are a number of things you should put in place.

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### 1. Understand what a wellbeing culture looks like and what you are trying to achieve

Before starting to create a tender, it would be worth taking the time to identify what you would like a culture of wellbeing to look like for your organisation and what potential wellbeing issues you are trying to solve. You can do this in a number of ways:

- Consider extracting information from employee engagement surveys and diversity and inclusion surveys
- Current Employee Assistance Programmes (EAPs) – evaluate these/consider reviewing how these are being used within the organisation including utilisation rates and potential barriers to usage
- Review your HR metrics such as incident reports, absence figures, presenteeism, staff turnover, lost time injury frequency, accidents and deaths etc.

#### When considering wellbeing in the workplace this should include:

- Health promotion/wellness
- Mental health
- Physical health
- Back pain and musculoskeletal health
- Health and safety
- Morale
- Staff engagement
- Risk exposure
- Performance

According to the London Healthy Workplace Charter, the benefits of having a healthy, fit and committed workforce include; lower absence rates, fewer accidents, improved productivity, staff who are engaged and committed to the organisation and fitter employees as they grow older.

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## 2. Create a wellbeing working group

Before the tender stage is reached, it is essential to create a working group to ensure ownership of the tender process and the wellbeing programme. The team should be knowledgeable enough to minimise any risk that may occur through a tender, and someone from senior management must be involved to ensure that company strategy is not compromised. It is also important to have someone in the group that can handle the communication aspects of the initiative.

## 3. identify potential providers

Once you have a good sense of your needs as an organisation, it is generally a good idea to put together a list of potential providers or at least have knowledge of the contenders in the market place. If you have no idea where to start, we would recommend:

- Contacting industry bodies such as the HSE for recommendations
  - Looking for thought leaders in the media and at industry events
  - Speaking to connections in other companies to see who they have used
  - Looking at case studies online of organisations who have run successful wellbeing initiatives
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# Areas to include in an effective wellbeing tender

## Executive summary

On completion of your tender, an executive summary should be created and added to the beginning of the document. This will provide a brief explanation of the main features of your requirements and must provide enough information for providers to assess if they are suitable to meet the provision.

## Who and why?

### Business overview and objectives

Provide a brief summary of what your organisation does, the services and products it provides and the market sectors in which you operate. This should include any significant changes happening or about to happen in the organisation, support policies and processes you already have in place and any wellbeing initiatives you have conducted in the past. This will help potential vendors understand the requirements that need to be met. You will also be required to specify why you are tendering for the service or product, as well as clarifying your desired outcomes and objectives.

### Relevant experience

It is important to understand the vendors experience and have the opportunity to review profiles of any key personnel involved in providing the service. By ascertaining the knowledge base of the vendor you can ensure that they are the most appropriately qualified. Information you should request includes case studies, references, details on who will be doing any delivery, if they are employed or sub-contracted and how consistency of service is ensured if parts of the service are sub-contracted.

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# Areas to include in an effective wellbeing tender

## What?

### Detailed specifications

This is the most important element of a tender and should have the most amount of information. For an effective wellbeing programme, the challenges regarding wellbeing in the workplace first need to be identified and then the appropriate action needs to be taken to address those issues.

Things that you should outline in your specification include:

- How will stress be defined and how will the participants be supported in recognising the early signs and symptoms?
- Outline of what can be delivered to address any specific issues that are recognised
- A list of resilience building techniques that will be taught to better equip staff to cope with stress, demand and pressure
- Description of engagement techniques used to build rapport between trainer and participants
- Examples of similar work undertaken for other clients in the same or similar industry sector
- How you and the provider will work together to build the programme before, during and after the delivery i.e. face-to-face meeting, phone call, surveys etc
- Clarity on what their validation process is including methodology and if they use benchmark data
- Examples of what can be used to communicate the workshop to participants
- Clarification of any constraints that could affect delivery as well as the requested time frame
- Examples of sample materials that will be used, e.g. questions on sample surveys, session plans, workshop handouts etc.
- Clarity on whether any programmes are bespoke or off the shelf

### Risk assessing for challenges

The challenges can be identified using a Wellbeing Insights Audit, a Stress Audit or a Stress Risk Assessment; this will allow the causes of stress in your company to be identified and be able to prioritise the most pressing concerns. This is particularly important when working to budget constraints.

The Health and Safety Executive provide guidelines on running a risk assessment and a review of its suitability should be carried out and included in your tender as criteria for a risk assessment.

Key guidance highlights include:

- Are all the aspects of your organisation included in the risk assessment (e.g. sites, locations, departments)?
  - Is the focus on prevention and organisational level solutions or is it aspirational?
  - Are provisions for dealing with other issues, e.g. individual issues included?
  - How is engagement and commitment from all parties (senior management, employees etc.) going to be ensured?
  - What current arrangements are in place, if any, to identify any causes of work related stress in the organisation or environment?
  - Are you going to make recommendations on best practice approaches to address any issues?
  - Is the entire employee population going to be involved in the process?
  - Will you publish the results or an executive summary?
  - Will there be provision of a report and action plan with reasonably practical solutions?
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# Areas to include in an effective wellbeing tender

## What? (cont.)

**When focusing on Stress specifically the HSE provides management standards which are factors that are known to contribute to stress at work:**

**1. Demands** (workload, work patterns and the working environment). In practice, we need to find out whether workload pressures are excessive and whether work patterns and the working environment are enabling employees to perform well whilst not putting their health at risk.

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**2. Control** (how much say the person has in the way they do their work) In practice, this looks at issues such as flexibility, having some choice or influence about, for example, the way work is done or when to take a break.

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**3. Support** (this includes the encouragement, sponsorship and resources provided by the organisation, line management and colleagues). In practice, this is broken down into peer support and management support.

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**4. Relationships** (this includes promoting positive working to avoid conflict and dealing with unacceptable behaviour). In practice, this is about identifying negative and potentially damaging behaviours that cause stress such as bullying and harassment.

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**5. Role** (whether people understand their role within the organisation and whether the organisation ensures that they do not have conflicting roles).

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**6. Change** (how organisational change, large or small, is managed and communicated in the organisation).

<http://www.hse.gov.uk/stress/standards/index.htm>

## Training

An integral part of a wellbeing programme is an effective education programme to raise awareness of how to recognise and reduce stress at work and create a culture of wellbeing.

Training can include workshops of varying lengths and content, and is used to address and overcome the challenges presented by the Business Stress Risk Review. It is recommended that all staff members including senior management, managers and general staff are included in the training process.

It is important for managers and senior managers to understand the strategic implications of the wellbeing initiative and that they have the skills and confidence to implement it and to exemplify the wellbeing culture.

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# Areas to include in an effective wellbeing tender

## What? (cont.)

The line management training programmes being proposed by respondents should meet the following criteria which are relevant for the service which you require:

- Be an effective first line of support and empathetic of the needs of their supports
- Give line managers a broad understanding of stress and mental health
- Introduce the concept of a mentally healthy workplace
- Identify the key factors that contribute to a mentally healthy workplace
- Increase awareness of stress and mental health issues in the workplace
- Establish the moral and business case for having a mentally healthy workplace
- Increase awareness of the extent of and common mental health challenges
- Establishes a normalised culture of wellbeing
- Improve managers' skills and confidence in dealing with stress, mental health and poor wellbeing
- Ensure that managers know their duty of care responsibilities in relations to health and wellbeing
- Identify the key stressors and how they can be used to identify and improve the effects of stress in the workplace
- Ensure participants are aware of the Disability Discrimination Act 2005 and its impact
- Clarify the meaning of the term 'reasonable adjustments' and to identify practical examples
- Identify current and good practice in relation to requirement and employment practices
- Deliver best practice strategies to deal with workplace absence and return to work policies
- Outline how to conduct an Individual Stress Risk Assessment

You will also need to outline what evidence you would like to be provided by respondents of their proposed training programme, e.g. template session plans, handout materials and how each module will address specific needs recognised through the Business Stress Risk Review.

## Wellbeing Policy

The design and development of a wellbeing policy can also be requested within a wellbeing tender. This is a document, which will provide you with a wellbeing framework. This should utilise positive practices that are already in place, solidify existing informal arrangements and create new processes which promote and improve the health and wellbeing of staff, as well as effectively signposting and raising awareness of existing support resources.

**Areas that should be included in your wellbeing policy are as follows:**

- |                                   |                                |
|-----------------------------------|--------------------------------|
| • Commitment and Responsibilities | • Sustainability               |
| • Vision and Mission Statement    | • Mental Health                |
| • Objectives and Strategies       | • Smoking and Tobacco          |
| • Corporate Support               | • Alcohol and Substance Misuse |
| • Attendance Management           | • Physical Activity and Eating |
| • Health and Safety               | • Monitoring and Reviewing     |

You should request from the respondents evidence of experience in creating a wellbeing policy and sample policies.

## Communications

Any provider should provide a communications and engagement strategy detailing how they will encourage maximum inclusion of your employees and the methods they will use (e.g. team meetings, emails, town halls, screen savers etc). This is a crucial element of any wellbeing projects success.

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# Areas to include in an effective wellbeing tender

## How?

### Assumptions and constraints

To keep the relationship between you and the potential providers as open and honest as possible, you need to make them aware of any assumptions and constraints which you may have. This can include travel expenses, or any materials that should be provided in addition to the main service or product that is included in the overall cost.

### Terms and conditions

Terms and conditions of the contract should be specified in order for respondents to make a response which is fair and honest. This can include the length of the contract, financing options, renewal options, delivery penalties, cancellation terms and guarantees. It should cover what level of money back guarantees and assurances are provided for failure to delivery or sub-standard delivery.

### Selection criteria

At the end of your tender document, you need to explain the criteria that your decision will be based upon. Some companies prefer to keep this confidential, but it will help potential respondents to further focus on what is important to your company. Once you have shortlisted providers via the tender process, we would always recommend a face to face presentation to ensure cultural compatibility. Potential suppliers will also need to know when and how they will be informed of whether they have been chosen to supply the service or product.

## When, where and how much?

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### Logistical details

- Deadline for proposal/quotation
- Dates of when service/product will be delivered
- Quantity of services/products required
- Contact details for answering queries
- Duration of service if applicable (e.g. half day workshop from 9.00am – 12.30pm)
- Location of service provision if applicable
- Ability to deliver in international and national locations

### The Financial Assessment should ensure that:

- All costs are properly covered in the prices
- Bids are comparable that is, that currency conversions are correct at that time
- Options for alternative ways of meeting the specification are identified and logged
- Details of any extra costs are identified in the bid (e.g. travel and resource materials)
- Any applicable discounts
- Retentions' are properly identified
- Terms of payment are included

You will need to request the respondent's price for the timeframe you need their service for, and what is included in that price and how long that price is valid for. **L**

### Costs

Costing is an important part of any buying process, although you need to weigh up the price with the quality you are receiving. Making a decision by choosing the cheapest may cost more overall as the product and service is less likely to meet your needs. This could result in little or no long term benefits and you having to undertake this process a second time, which would only be possible if funds are still available.





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## FREE Business Stress Consultation

We provide a range of services across the UK and internationally. We are always happy to discuss how we can support you. Please get in touch today and take the first step in reducing the impact of stress in your organisation.

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