



sanedi

South African National Energy
Development Institute.

Bid: 1821

REQUEST FOR QUOTATION

FACILITATION OF A STRATEGIC PLANNING SESSION FOR SANEDI

BIDDER'S DETAILS

NAME OF BIDDER.....

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER Code Number

RFQ Number	1821
Date of RFQ	09 th July 2021
Closing date	15 th July 2021 at 11:00
SANEDI Contact	All enquiries and RFQ submissions must be directed to : Name: Ms. Nondumiso Buthelezi Tel: 011 038 4300 e-mail address: enquiries.procurement@sanedi.org.za
Submission methods	The submissions should be made to the following email quotes.procurement@sanedi.org.za NB: failure to submit in the correct email will render your submission non-responsive.
Work specifications (Technical Specifications)	<p>1. Project Background</p> <p>The South African National Energy Development Institute (SANEDI) was established in 2011 as an agency of the Department of Energy. The National Energy Act, 2008 (Act No. 34 of 2008), Section 7 (2) gave effect to SANEDI's existence and provides for its primary mandate and specific responsibilities. The Act provides for SANEDI to direct, monitor and conduct energy research and development, promote energy research and technology innovation as well as undertake measures to promote energy efficiency throughout the economy. As SANEDI has a science and technology research and development focus, it also has close ties to the Department of Science and Technology (DST).</p> <p>SANEDI is controlled and managed by a Board whose members are appointed by the Minister of Energy. The Board has representation from the Department of Energy, Department of Environmental Affairs, Department of Science and Technology and the Department of Trade and Industry. The remaining four members, including the Chairperson and the Deputy Chairperson, are from the private sector.</p> <p>One of the priority functions of the Board is to provide strategic direction to SANEDI. With the elections now firmly behind us work has to be undertaken to plan for the next five years of the government planning cycle. It is for this purpose, that the Board wants to undertake a strategic planning workshop for the organization where the Board, with the assistance of a skilled facilitator, will provide strategic guidance to the organization to inform the focus of the subsequent planning cycle.</p> <p>It is imperative that the facilitator has extensive experience and knowledge of the energy industry especially within the area of renewable energy and energy efficiency. The facilitator will be expected to contribute and showcase extensive knowledge on developments within the renewable's field and assist the Board in formulating a strategy which is aligned to developments in this area.</p>

2. Scope of works

As an agency of Government, SANEDI has a key role to play in bringing about the transformation and redress goals of government through energy research, development and innovation.

The services of an experienced strategy facilitator is required to assist with the SANEDI strategic planning session. The focus of the SANEDI strategic planning session will be:

1. Engagements with the Shareholder in order to seek alignment with the expectations of the Shareholder.
2. For the Board to share its vision for the organization and the facilitator to assist in charting the new vision and mission for the organization.
3. For the facilitator to share their unique perspective on what the vision and priorities are for the energy sector and assist in setting the focal areas for SANEDI's activities, i.e.:
 - a. An overview of the priorities for the sector;
 - b. The anticipated role and contribution from the energy development space in realizing the vision for the energy sector;
 - c. Evaluation of whether SANEDI has fulfilled its role to date, and how it is expected to play its role henceforth;
 - d. Amend the Strategic Plan and the Annual Performance Plan for 2022/2023 due to changes in the Macro environment and organizational structure.
 - e. Development of the Annual Performance Plan for 2022/2023.
4. The expectation is for the service provider to:
 - Setting up of virtual sessions for all consultations with Shareholder, board and management..
 - Consult with the Chairperson of the Board and the CEO of SANEDI to develop an approach for the SANEDI strategic planning workshop,
 - Prepare for the strategic planning session,
 - Facilitate the strategic workshop session, with the end objective being a properly formulated strategy with clear strategic objectives, and
 - Prepare a summary report (Word) with key outputs and recommendations following the strategic planning workshop.

3. Timelines

The service provider must be able to facilitate the session as follows:

- Review 5 year term Strategic Plan and Development of the Annual Performance Plan for 2022/2023, before end of September 2021.

4. Skills and competence of a team

- 10 years' experience in facilitating strategic planning in the public sector with a knowledge of developing the Annual Performance Plan.
- 10 years extensive background and experience within the energy sector.
- 5 years' experience in the organizational review and restructuring.

5. Capacity and Experience of the Firm

The service provider should be a suitably skilled Facilitator and any supporting structures required to deliver the service.

6. Confidentiality

Due the potential sensitivity of information handled during the strategic planning workshop, the service provider may be required to certify that they have acquainted themselves with the SANEDI Non-Disclosure Agreement. All information related to a subsequent contract, both during and after completion thereof, must be treated with strict confidence. Should there be a requirement to disclose any information gleaned from provision of the Services, which is either directly or indirectly related to SANEDI's business, approval to disclose such information must be obtained from SANEDI.

Minimum requirement	Technical Criteria	Applicable Scores (1-10)	Weight
	CV of the facilitator attached and the facilitator has at least 10 years' experience facilitating strategic planning or similar sessions	<ul style="list-style-type: none"> • 15 and more years =10 • 13-14 years = 7 • 11 - 12 years =5 • 5- 10 years =3 	25%
Demonstrated experience in facilitating multi-stakeholder strategic planning sessions in public sector. Experience in developing the Annual Performance Plan in the Public Sector.	<ul style="list-style-type: none"> • Experience facilitating more than five sessions for a group consisting of multi - stakeholders = 10 • Experience facilitating more than one session for a group consisting of multi -stakeholders = 5 • Experience facilitating at least one session for a group consisting of multi- stakeholders = 1 	25%	
Experience in the energy sector strategic planning (attached reference letters and CV's)	<ul style="list-style-type: none"> • Sector experience evident on CV and supported by at least 3 reference letters =10 • Sector experience evident on CV and supported by at least 2 reference letters =5 • No sector experience evident on CV =1 	20%	
Experience in developing the Annual Performance Plan in the Public Sector. (Attached reference letters and CV's)	<ul style="list-style-type: none"> • Sector experience evident on CV supported by at least 1 reference letter =10 • Sector experience evident on CV =5 • No sector experience evident on CV =1 	20%	
• Experience in the organizational review and restructuring.	<ul style="list-style-type: none"> • Organizational review and restructuring experience evident on CV and supported by at least 3 reference letters =10 • Organizational review and restructuring experience evident on CV and supported by at least 2 reference letters =5 • No organizational review and restructuring experience evident on CV =0 	10%	
Total		100	
Technical Threshold		70	

Preferential procurement system	<p>The Bid will be evaluated on 80/20 Preferential Point System according to the Preferential Procurement Policy Framework Act,2000</p> <p>The points scored out of 80 should be calculated according to the following formula:</p> <p>(i) The 80/20 preference point system</p> $Ps = 80 \left(1 - \frac{Hs - Rs}{Rs} \right)$ <p>where</p> <p>Ps = points scored for functionality and price of the bid/proposal under consideration</p> <p>Hs = highest percentage scored by any acceptable bidder for functionality and price</p> <p>Rs = percentage scored for functionality and price by bid/proposal under consideration</p>								
	<p>The maximum score for this bid shall be awarded as follows:</p> <table border="1" data-bbox="277 1367 1395 1625"> <thead> <tr> <th>POINTS</th> <th>PRICE</th> </tr> </thead> <tbody> <tr> <td>BBBEE Status level of Contribution</td> <td>20</td> </tr> <tr> <td>Points for price</td> <td>80</td> </tr> <tr> <td>Total points for price and BBBEE do not exceed</td> <td>100</td> </tr> </tbody> </table>	POINTS	PRICE	BBBEE Status level of Contribution	20	Points for price	80	Total points for price and BBBEE do not exceed	100
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Terms and Conditions	<p>The RFQ shall be subjected to the SANEDI procurement terms and conditions which can be found on www.sanedi.org.za .</p> <p>New suppliers are requested to apply for registration as suppliers on the database as no RFQs will be considered without suppliers firstly being registered on the supplier database.</p>								

	<p>Important Notes</p> <ul style="list-style-type: none"> • The price quoted for the first year will be firm. From year 2, the price will be subject to an annual price increase based on the CPI. • The SANEDI reserves the right not to make an award.
Total Amount VAT inclusive	
Other Requirements	<p>The supplier must:</p> <ol style="list-style-type: none"> 1. Pricing schedule 2. Attach SBD9, SBD 4 and BBBEE Bid Declaration 3. Attach valid tax clearance 4. Certified BBBEE certificate and CSD Report

SBD 4: Bidder’s Declaration of Interest

<p>Any legal person, including persons employed by the state, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favoritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, 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 where</p> <ul style="list-style-type: none"> - the bidder is employed by the state; 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.
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	In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

COMPANY & REPRESENTATIVE DETAILS	
Full Name of bidder or his or her representative	
Identity Number	
Position occupied in the Company (director, trustee, shareholder, member):	
Registration number of company, enterprise, close corporation, partnership agreement or trust	
Tax Reference Number	
VAT Registration Number	

DECLARATIONS	YES	NO
Are you or any person connected with the bidder presently employed by the state?		
If so, furnish the following particulars: Name of person / director / trustee / shareholder/ member		
Name of state institution at which you or the person connected to the bidder is employed :		
Position occupied in the state institution		

	Any other particulars:		
	If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector?		
	If yes, did you attach proof of such authority to the bid document? <u>(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.</u>		
	If no, furnish reasons for non-submission of such proof:		
	Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months?		
	If so, furnish particulars:		
	Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid?		
	If so, furnish particulars:		

	Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies Wither or not they are bidding for this contract?		
	If so, furnish particulars:		

Full details of directors / trustees / members / shareholders.			
The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in the table below.			
Full Name	Identity Number	Personal Income Tax Reference Number	State Employee Number / Peral Number

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“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

”Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

DECLARATION OF INTEREST

I, the undersigned (name).....

Certify that the information furnished in this declaration is correct and I accept that SANEDI may reject the bid or act against me should this declaration prove to be false.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

SBD 9: Certificate of Independent Bid Determination

I, the undersigned, in submitting the accompanying bid for
in response to the invitation for the bid made by SANEDI do hereby make the following
statements that I certify to be true and complete in every respect:

I therefore certify, on behalf of that I
have read and I understand the contents of this Certificate;

1. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
2. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
3. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
4. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
5. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium will not be construed as collusive bidding.
6. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;

- (b) geographical area where product or service will be rendered (market allocation)
- (c) methods, factors or formulas used to calculate prices;
- (d) the intention or decision to submit or not to submit, a bid;
- (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
- (f) bidding with the intention not to win the bid.

7. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.

8. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

9. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

B-BBEE Bid Declaration

Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:		
B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED (Points claimed for BBEE must be substantiated by means of a certified B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).	Points Claimed 	
SUB-CONTRACTING	YES	NO
Will any portion of the contract be sub-contracted?		
If yes, indicate: what percentage of the contract will be subcontracted?	%	
the name of the sub-contractor?		
the B-BBEE status level of the sub-contractor?		
is the sub-contractor an EME?		

I, the undersigned (full name).....

Certify that the B-BBEE information furnished on this declaration form is true and correct and attach a current broad-based black economic empowerment certificate as verified by an accredited agency.

i accept that, in addition to cancellation of a contract, action may be taken against me should this declaration prove to be false.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date