



**sanedi**

South African National Energy  
Development Institute.

## Request for Quotation

<b>RFQ Number</b>	376- Training Support to “Introduction to Data Management and Data Analysis using Tableau and SQL Server”
<b>Date of RFQ</b>	14 <sup>th</sup> September 2016
<b>SANEDI Contact</b>	All enquiries and RFQ submissions must be directed to :  Name: Ms. Fikile Manganyi Tel: 011 038 4300 e-mail address: <a href="mailto:enquiries.procurement@sanedi.org.za">enquiries.procurement@sanedi.org.za</a>
<b>Required response time for quotation</b>	28 <sup>th</sup> September 2016 at 11:00  Submissions must be made to <a href="mailto:376.procurement@sanedi.org.za">376.procurement@sanedi.org.za</a> , failure to submit in the correct e-mail will render your submission disqualified.
<b>Work specification (and Technical specifications)</b>	<p><b>Project Background</b></p> <p>The Department of Energy (DoE) is currently improving the availability and access to renewable energy data and information.</p> <p>This effort is evolving around the development of a public Renewable Energy Data and Information Service (REDIS) and an internal knowledge management system on renewable energy (reWIKI).</p> <p>The REDIS and reWIKI project introduces a number of generic methodologies and tools that are relevant to everyone at the Department of Energy.</p> <p>The REDIS Team will therefore offer a training workshop series to everyone at the Department of Energy, involving training in agile project management, collaborative knowledge management, and data management with Tableau/SQL. However, the targeted focus of the training will be the REDIS/reWIKI project team from the Clean Energy and Energy Planning Chief Directorates of DoE.</p> <p>The activity is a component under the Danish South African Programme on Renewable Energy.</p>

The activity is specified in the Inception Report Par. 5.3 (pg. 31). The budget for the activity is covered by the budget item “DoE/REDIS training & development incl. external service providers” (Annex C, pg. 39).

**Scope of work**

The primary objective of these Terms of Reference is to procure a qualified service provider to support the programme’s Technical Advisor in preparing and implementing a one-day workshop titled “Introduction to Data Management and Data Analysis using Tableau and SQL Server”.

The workshop shall introduce data management issues and data management tools in general, however focusing on Tableau and Microsoft SQL.

The workshop shall introduce the Tableau software in particular, and in combination with Microsoft SQL as a versatile and effective tool for data management, analysis, and publishing.

The workshop shall involve hands-on skills training using Tableau. Attendees are expected to bring their own laptops with a trial version of Tableau installed.

For attendees, the outcome shall be to:

- A. Understand the basics of data management and analysis in general, including overview of Tableau and SQL
- B. Understand the basics of data management and analysis in Tableau in more detail
- C. Be able to analyse how best to manage and analyse data in Tableau
- D. Know how to manage, analyze, and publish data using Tableau, including connecting to Microsoft SQL, and publish dashboards/stories.

The scope of work for the appointed service provider includes the following tasks:

1. Phone and email correspondence with the Technical Advisor, corresponding to about 5 work hours.
2. One 3-hour preparatory face-to-face meeting with the Technical Advisor in Pretoria prior to the course
3. Preparations regarding the agreed division of labour corresponding to at least 15 work hours
4. Preparation and printing of selected brief 12-pages “handbook” (A5-format). The handbook should be organized according to the 4 intended learning outcomes above (A, B, C, D).
5. Preparation and printing of course material according to the agreed division of labour
6. Leading contributions during the training course on the date specified from 8:00-16:00 (course scheduled for 9:00-14:00)

	<p>7. 5 x 2-hour sessions of phone, Skype or e-mail coaching/support to DoE subsequent to the training course</p> <p>The Department of Energy will provide a suitable venue on their premises at 192 Visagie Street, Pretoria, catering, and AV-equipment. Participants are expected to bring their own laptops with Tableau installed and with network access to a Microsoft SQL server.</p> <p>The timeline for the appointed service provider is as follows:</p> <table border="1" data-bbox="456 495 1187 1083"> <thead> <tr> <th>Deliverable</th> <th>Completion date(s)</th> </tr> </thead> <tbody> <tr> <td>Phone and email correspondence, meeting with the technical advisor in Pretoria, and preparations</td> <td>September 2016</td> </tr> <tr> <td>12-pages "handbook"</td> <td>Three days prior to training course day, tentatively 16 September 2016</td> </tr> <tr> <td>Training course date</td> <td>Tentatively 20 September 2016, to be announced</td> </tr> <tr> <td>Phone, Skype or e-mail coaching sessions</td> <td>November 2016</td> </tr> </tbody> </table>	Deliverable	Completion date(s)	Phone and email correspondence, meeting with the technical advisor in Pretoria, and preparations	September 2016	12-pages "handbook"	Three days prior to training course day, tentatively 16 September 2016	Training course date	Tentatively 20 September 2016, to be announced	Phone, Skype or e-mail coaching sessions	November 2016
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<p><b>Required qualifications and experience (Technical Evaluation Criteria)</b></p>	<p><b>Evaluation criteria and format of the proposal</b></p> <p>The service provider is invited to submit a 2-page description of his/her strategy for implementing the training on the subject, including a general description of his/her didactic approach. The strategy should include a rough outline of connected elements that would make up 5 hours of training on the subject.</p> <p>The service provider must furthermore submit a CV and a financial offer (incl. travel expenses).</p> <table border="1" data-bbox="456 1556 1417 1883"> <thead> <tr> <th>Evaluation Criteria</th> <th>Scoring Guidelines (1-10)</th> <th>Weighting</th> </tr> </thead> <tbody> <tr> <td>Conformity of proposal/strategy to desired specifications</td> <td>a) 100% conformity = 10 b) 50% conformity = 5 c) 10% conformity = 1</td> <td>30%</td> </tr> <tr> <td>Qualifications of key staff on teaching and training data</td> <td>a) Master level education or higher = 10 b) Bachelor (Hons) = 8</td> <td>25%</td> </tr> </tbody> </table>	Evaluation Criteria	Scoring Guidelines (1-10)	Weighting	Conformity of proposal/strategy to desired specifications	a) 100% conformity = 10 b) 50% conformity = 5 c) 10% conformity = 1	30%	Qualifications of key staff on teaching and training data	a) Master level education or higher = 10 b) Bachelor (Hons) = 8	25%
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	management and Tableau/SQL documented through completed formal training/education (bidder must provide certified copies of the qualification, failure to prove the certified copies will forfeit points)	c) Bachelor level education = 6 d) Diploma = 3 e) No formal education = 1	
	Exceptional credentials of key staff on teaching and training data management Tableau/SQL documented through personal referrers or written recommendations Proposal should include documentation, including contact information to referrers, if any. (bidder must provide a CV and written references from the client they have done work for)	a) 3 references/recommendations or more = 10 b) 2 references/recommendations = 5 c) 1 reference/recommendation = 3	25%
	Company references on data management Tableau/SQL training and coaching activities successfully completed within the past 3 years. This should be presented in a table indicating date, client name, number of trainees.	a) 5 written references or more = 10 b) 3 written references = 8 c) 1 written reference = 1	20%
	<b>Threshold</b>		<b>70</b>
	<b>Total</b>		<b>100%</b>

	Total points available 100 = <b>Minimum threshold 70 points</b>
<b>Terms and Conditions</b>	<p>The RFQ will be evaluated on the basis of price or where deemed necessary by the procurement department, evaluated on the 80/20 basis. SANEDI reserves the right not to accept the lowest priced quoted.</p> <p>The RFQ shall be subjected to the SANEDI procurement terms and conditions which can be found on <a href="http://www.sanedi.org.za">www.sanedi.org.za</a>.</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>
<b>Quoted Price excluding Disbursements VAT inclusive</b>	<p>(Attach a formal quotation on company official letterhead to this RFQ)</p> <p>R</p>
<b>Discounted amounts Disbursements VAT inclusive</b>	R
<b>Total Amount VAT inclusive</b>	R
<b>Other Requirements</b>	<p>The supplier must:</p> <ol style="list-style-type: none"> <li>1. Attached brochures of the training need to be attached to the RFQ.</li> <li>2. Attach a formal quotation on their company letter head in addition to filling in the price on this RFQ.</li> <li>3. Indicate any early settlement discounts and the percentages applicable and the applicable time frames.</li> <li>4. Attach SBD9(Available on the SANEDI website)</li> </ol> <p><b>(Only applicable to new suppliers not on our Database)</b>  <i>Application to register on the SANEDI database and all returnable schedules must accompany the RFQ.</i></p> <ol style="list-style-type: none"> <li>1. <i>Returnable schedules:</i> <ol style="list-style-type: none"> <li>a. <i>BBBEEE certificate must be attached</i></li> <li>b. <i>SBD 4 must be completed</i></li> <li>c. <i>Valid tax clearance</i></li> <li>d. <i>Acknowledgment of SANEDI procurement Terms and conditions.</i></li> <li>e. <i>Central Supplier Database (CSD) Summary Report</i></li> </ol> </li> </ol> <p>Forms are available on <a href="http://www.sanedi.org.za">www.sanedi.org.za</a></p>

**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"> <li>- the bidder is employed by the state; and/or</li> <li>- 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.</li> </ul>
	<p><b>In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.</b></p>

<b>COMPANY &amp; REPRESENTATIVE DETAILS</b>	
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	

<b>DECLARATIONS</b>	<b>YES</b>	<b>NO</b>
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	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:		

<b>Full details of directors / trustees / members / shareholders.</b>			
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.			
<b>Full Name</b>	<b>Identity Number</b>	<b>Personal Income Tax Reference Number</b>	<b>State Employee Number / Persal Number</b>




“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>B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED</b> (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).	<b>Points Claimed</b> .....	
<b>SUB-CONTRACTING</b>	<b>YES</b>	<b>NO</b>
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 .....