



## ENERGY OFFICE

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### **Request for Quotation: Develop Educational Material for Short Contact and On-line Course on Renewable Energy and Energy Efficient Technologies and Train Trainers of Contact Course**

#### **1. Introduction**

The eThekweni Municipality wishes to procure the services of a suitably qualified service provider to develop material for presentations on renewable energy and energy efficient technologies and to train facilitators who will facilitate these training courses.

#### **2. Background**

The Energy Office is responsible for climate change mitigation through the reduction of greenhouse gas emissions into the atmosphere. The energy sector is undergoing rapid change and new technologies using renewable energy or that are significantly more energy efficient than conventional technologies are now accessible to consumers. The Energy Office promotes the uptake of these technologies through various media such as brochures, presentations and websites (e.g. shisasolar.org.za and durbansolarmap.co.za).

Amongst councilors, municipal officials and the general public high interest in the new technologies has been observed, however there is very limited understanding on how these technologies function, what regulations apply and what their advantages and disadvantages are.

The Energy Office has published a brochure on Renewable Energy Technologies ([http://www.durban.gov.za/City\\_Services/energyoffice/Pages/Pictures-and-Media.aspx](http://www.durban.gov.za/City_Services/energyoffice/Pages/Pictures-and-Media.aspx)) providing basic information on four technologies, namely

- Solar water heating;
- Heat pumps;
- Solar photovoltaic; and
- Small wind turbines.

#### **3. Objectives of the Project**

The principle objective of the project is to contribute towards enhancing the understanding of potential consumers installing energy efficient and renewable energy technologies in order to

increase the use of these technologies. The target group are interested lay persons who consider installing one or more renewable energy and energy efficient technologies. Specific objectives of the project are

1. Develop a 2 to 3-hour course covering all four technologies;
2. Develop presentations and other material for the course including facilitator's notes;
3. Train ten facilitators / trainers in conducting the course;
4. Develop an online version of the course.

The education material / course will not be accredited.

## **4. Scope of Works**

### **4.1 Activity 1: Develop Structure and Content of the 2 to 3-hour Course**

The course must cover introductions to four technologies and how they can be combined, namely:

- Solar water heating,
- Heat pumps,
- Solar photovoltaic, and
- Wind.

The brochure "Technologies for Renewable Energy and Energy Efficiency – How do they work?" published by eThekweni Municipality provides basic content to be covered. The service provider is encouraged to propose additions or amendments to the content.

The course must consist of presentations on the technologies and must allow for discussion and questions and answers. Additional methodologies may be suggested.

**Deliverable 1: Outline of structure, methodologies and content of the course.**

### **4.2 Activity 2: Develop Presentations and Other Training Material Including Facilitator's Notes**

All components of the course must be developed in detail including a least but not limited to:

- Presentations in PowerPoint format,
- Background material covering potential questions and discussions, and
- Facilitator's notes.

The material must be appropriate for interested lay people. Technologies must be explained in everyday language without technical jargon.

**Deliverable 2: Course material including presentations in PowerPoint format, other material in written and/or electronic format, facilitator's notes.**

### **4.3 Activity 3: Train Facilitators/Trainers in Conducting the Course**

The service provider must train ten facilitators/trainers to conduct the course. The facilitators/trainers will be members of staff of the Energy Office or of institutions collaborating with

the Energy Office. All facilitators/trainers have a complete tertiary education and basic understanding of energy efficiency and renewable energy but may not be familiar with all technologies. Most of them have no experience as facilitators/trainers.

**Deliverable 3: Facilitation of 1-day training workshop on content and facilitation of the course.**

#### **4.4 Activity 4: Develop On-line Version of the Course**

An on-line version of the course must be developed consisting of presentations and allowing the participants to access additional information. Interactive components e.g. tests with Multiple Choice Questions should complement the on-line course.

The on-line course will be published in the Energy Office section of the eThekweni Municipality website ([www.durban.gov.za](http://www.durban.gov.za)).

**Deliverable 4: On-line version of the course in suitable electronic format that can be uploaded to eThekweni Municipal website.**

### **5. Proposal Submissions**

All interested service providers should be registered on the municipal supplier database.

They are required to submit a proposal with the following chapters:

1. Chapter One: An overview of the experience and expertise of the proposed team member/s especially experience with energy technologies including evidence such as reference projects.
2. Chapter Two: A brief two to three page summary of the methodology of developing the course material including evidence of experience such as reference projects.
3. Chapter Three: A brief two to three page summary of the methodology to train the trainers including evidence of experience such as reference projects.
4. Chapter Four: A brief two to three page summary of the methodology to develop the online course including evidence of experience such as reference projects. .
5. Chapter Five: A budget breakdown showing the total consulting fees and showing VAT and disbursements as separate figures. Please note that the costs of venue and catering for the workshop must not be included in the budget.
6. A workplan with clearly defined milestones reflecting the 4 main activities.

The proposal must be accompanied by the following supporting documents:

- 1) Scanned Copy of Valid Tax clearance certificate,
- 2) Annexure: Supporting Documents (MBD 9 Forms):
  - a. Original Declaration of Interest
  - b. Original Declaration of Municipal Fees
  - c. Original Certificate of Independent Bid Determination
  - d. Certified copy of BBBEE certification

These terms of reference are subject to changes which may stem from a negotiation of the final terms with the service provider.

## 6. Service Provider Skills and Experience

Service Providers submitting proposals must be accredited with the relevant training authority and must demonstrate the following:

1. Substantial expertise and experience in the training and course development industry.
2. Thorough understanding of common renewable energy and energy efficient technologies in South Africa.
3. Good writing, documentation and training skills
4. Experience in developing on-line courses

## 7. Adjudication

This contract will be adjudicated in terms of the eThekweni Municipality Supply Chain Management rules and policies and will follow the 80:20 rule. The procurement will be done in terms of the Section 18 of approved Supply Chain Management Policy, "Procedures for procuring goods or services through written or verbal quotations and formal written price quotations<sup>1</sup>" (i.e. formal written price quotations for procurements of a transaction value over R30 000 up to R200 000 (VAT included)).

### 7.1 Adjudication Criteria

The adjudication of proposals will be conducted in two phases in terms of the following Scoring System:

#### 7.1.1 Phase 1: Functionality (100 points)

CRITERION	Maximum Score
<b>Functionality</b>	<b>100</b>
1. Team member's (individuals not company) Experience and expertise of the service provider in the training and course development industry (please provide examples of previous work)	30
2. Team member's (individuals not company) understanding of common renewable energy and energy efficient technologies in South Africa.(please provide example of previous work)	30
3. Team member's (individuals not company) writing, documentation and training skills (please provide example of previous work)	20
4. Team member's (individuals not company) experience in developing on-line courses (please provide example of previous work)	20

Criteria	0%	40% (poor)	70% (satisfactory)	90% (good)	100% excellent)
1	0 points	12 points	21 points	28 points	30 points
2	0 points	12 points	21 points	28 points	30 points

<sup>1</sup><http://www.durban.gov.za/durban/government/scm/strategy/Approved%20SCM%20Policy.pdf>

3	0 points	8 points	14 points	18 points	20 points
4	0 points	8 points	14 points	18 points	20 points

Bidders must score a minimum of 70 points in total for functionality in order to be evaluated for “Phase 2: Price and Preferential Procurement”. The functionality criteria will be scored according to the following requirements.

Criteria	Description	0%	40% (poor)	70% (satisfactory)	90% (good)	100% (excellent)
1. Team member’s (Individuals not company) Experience and expertise of the service provider in the training and course development industry	How many years of experience does the team member have? Supply (Itemize) team member’s names that will be working on project with years of experience in training course development	No response or no experience	0 to 1 year	1-2 years	2-4 years	Over 4 years
2. Team member’s (Individuals not company) understanding of common renewable energy and energy efficient technologies in South Africa	How many projects involving energy has the team member completed? Provide team member’s name and list of relevant projects. Attach project examples.	No response or no experience	1 project example provided	2 to 3 project examples provided	4 to 5 project examples provided	over 5 project examples provided
3. Team member’s (Individuals not company) writing, documentation and training skills	How many projects requiring writing, documentation and/or training skills has the team member completed? Provide team member’s name and list of relevant projects. Attach project examples.	No response or no experience	1 project	2-3 projects	4-5 projects	Over 5 projects
4. Team member’s (Individuals not company) experience in developing on-line courses	How many on-line courses has the team member completed? Provide team member’s name and list of relevant projects. Attach link to project examples.	No response or no experience	1 project	2-3 projects	4-5 projects	Over 5 projects

### 7.1.2 Phase 2: Price and Preferential Procurement (100 points)

- 1) Price (80 points)
- 2) Preferential Procurement (20 Points)

Broad Based Black Economic Empowerment Points will be awarded to bidders in accordance with the table below:

<b>B-BBEE Status Level of Contributor</b>	<b>80/20 Point System</b>
1	20
2	18
3	16
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

## 7.2 Total Scores

The total adjudication score will be recorded as follows

<b>Criteria</b>	<b>Max. Points Scoring</b>
<b>Phase1: Functionality</b>	<b>100 Points</b>
1. Team member's (Individuals not company) Experience and expertise of the service provider in the training and course development industry (Please provide examples of previous work)	30
2. Team member's (Individuals not company) understanding of common renewable energy and energy efficient technologies in South Africa.(please provide example of previous work)	30
3. Team member's (Individuals not company) writing, documentation and training skills (please provide example of previous work)	20
4. Team member's (Individuals not company) experience in developing on-line courses(please provide example of previous work)	20
<b>TOTAL Phase 1:</b>	<b>100</b>
<b>Phase 2: Price and Preferential Procurement</b>	<b>100 Points</b>
Price	80
Preferential Procurement	20
<b>TOTAL Phase 2:</b>	<b>100</b>

## 8. Payments

Payments will be made on the basis of the submission of deliverables. A maximum of three payments are proposed: payment 1 at submission of deliverables 1 + 2, payment 2 at completion of activity 3 and final payment after full completion of the project and on the receipt of all deliverables.

## 9. Time Frames

It is planned that the contract will be for a period of three months (March to May 2016).

**THE CLOSING DATE FOR SUBMISSIONS OF QUOTATIONS IS 11H00 ON THE 28 January 2016.**

Each service provider must submit a quotation clearly marked **“Develop Educational Material for Short Contact and On-line Course on Renewable Energy and Energy Efficient Technologies and Train Trainers of Contact Course”**.

Quotations/proposals need to be submitted to:

E-mail: [Nondumiso.Mthembu@durban.gov.za](mailto:Nondumiso.Mthembu@durban.gov.za)

Delivered to

Nondumiso Mthembu

3<sup>rd</sup> Floor, SmartXchange, 5 Walnut Road, Durban 4001

Tel: 031 322 2635

For Technical Queries contact

Susanna Godehart

Cell: 083 651 1854

Tel: 031 322 2621

**NOTE: if you are submitting a softcopy, it has to be accompanied by a hard-copy.**

Please ensure that you receive a confirmation of receipt if submitted by email and that emails do not exceed 5 MB in size. The eThekweni Municipality does not bind itself to accept the lowest or any quotation, and reserves the right to accept a portion of any quotation, unless the supplier expressly stipulates otherwise in their quotation. The eThekweni Energy Office does not undertake to consider quotations received after the due date and time.

This request for quotations is subject to any changes which may stem from a negotiation of the final terms with the service provider, as well as any additional budget which may be allocated to the project. Final payment will be paid on full completion of the project and the receipt of the final set of deliverables.

## Annexure: Supporting Documents

### **A. DECLARATION OF INTEREST**

1. No bid will be accepted from persons in the service of the state<sup>2</sup>.
2. Any person, having a kinship with persons in the service of the state, 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 connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.
3. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

3.1. Full Name of bidder or his or her representative:.....

3.2. Identity Number: .....

3.3. Position occupied in the Company (director, trustee, shareholder<sup>3</sup>):.....

3.4. Company Registration Number: .....

3.5. Tax Reference Number:.....

3.6. VAT Registration Number: .....

3.7. The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

3.8. Are you presently in the service of the state? **YES / NO**

If yes, furnish particulars.....

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<sup>2</sup>MSCM Regulations: "in the service of the state" means to be –

- (a) a member of –
  - (i) any municipal council;
  - (ii) any provincial legislature; or
  - (iii) the national Assembly or the national Council of provinces;
- (b) a member of the board of directors of any municipal entity;
- (c) an official of any municipality or municipal entity;
- (d) an employee of 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);
- (e) a member of the accounting authority of any national or provincial public entity; or
- (f) an employee of Parliament or a provincial legislature.

<sup>3</sup>Shareholder" means a person who owns shares in the company and is actively involved in the management of the company or business and exercises control over the company.



3.9. Have you been in the service of the state for the past twelve months? .....**YES / NO**

If yes, furnish particulars.....

.....

3.10. Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved with the evaluation and or adjudication of this bid? ..... **YES / NO**

If yes, furnish particulars.

.....

.....

3.11. Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

If yes, furnish particulars

.....

.....

3.12. Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**

If yes, furnish particulars.

.....

.....

3.13. Is any spouse, child or parent of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? **YES / NO**

If yes, furnish particulars.

.....

.....

3.14. Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract? **YES / NO**

3.14.1 If yes, furnish particulars:

.....

.....  
4. Full details of directors / trustees / members / shareholders.

<b>Full Name</b>	<b>Identity Number</b>	<b>State Employee Number</b>

.....  
**Signature**

.....  
**Date**

.....  
**Capacity**

.....  
**Name of Bidder**

**B. DECLARATION OF MUNICIPAL FEES**

I/We do hereby declare that the Municipal fees of \_\_\_\_\_ (company name), are, as at the date of the tender closing, fully paid up, or arrangements have been concluded with the Municipality to pay the said fees :

<b>ACCOUNT</b>	<b>ACCOUNT NUMBER</b>
ELECTRICITY	_____
WATER	_____
RATES	_____
JSB LEVIES	_____
OTHER	_____

I acknowledge that should it be found that the Municipal fees are not up to date, the Council may take such remedial action as is required, including termination of contract, and any income due to the Contractor shall be utilised to offset any monies due to the Council.

\_\_\_\_\_

Name

\_\_\_\_\_

Signature

\_\_\_\_\_

Designation

\_\_\_\_\_

Date

## **C. CERTIFICATE OF INDEPENDENT BID DETERMINATION**

1. This Municipal Bidding Document (MBD) must form part of all bids<sup>1</sup> invited.
  
2. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).<sup>2</sup> Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
  
3. Municipal Supply Regulation 38 (1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:
  - a. take all reasonable steps to prevent such abuse;
  
  - b. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and
  
  - c. cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.
  
4. This MBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
  
5. In order to give effect to the above, the attached Certificate of Bid Determination (MBD 9) must be completed and submitted with the bid:

<sup>1</sup> Includes price quotations, advertised competitive bids, limited bids and proposals.

<sup>2</sup> Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

**MBD 9 CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

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(Bid Number and Description)

in response to the invitation for the bid made by:

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(Name of Municipality / Municipal Entity)

do hereby make the following statements that I certify to be true and complete in every respect:  
I certify, on behalf

of: \_\_\_\_\_ that:  
(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. 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;
  
6. 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
  
6. 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<sup>3</sup> will not be construed as collusive bidding.
  
7. 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.

8. 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.

9. 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.

10. 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.

.....

Signature

.....

Date

.....

Position Name of Bidder

.....

Date

<sup>3</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.