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**REQUEST FOR PRICE QUOTATIONS FOR THE APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE STRATEGIC PLANNING SESSION FOR THE DEPARTMENT OF ENERGY FOR A PERIOD OF 3 WEEKS**

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**1. BACKGROUND**

- 1.1. Chapters 5 and 30 of the Treasury Regulations read together with the Framework for Strategic Plans and Annual Performance Plans requires the Accounting Officer to prepare a Strategic Plan for Forthcoming MTEF period for approval by the relevant Executive Authority.
- 1.2. The Department of Energy is in the process of conducting the Strategic Planning Session for the development of the 2018/19 Annual Performance Plan.
- 1.3. The purpose of the Strategic Planning Session is to review the Vision, Mission, Values, Programmes, Performance Indicators, Annual Targets and Quarterly Targets as well as to develop Goals and Objective which will serve as a guide to programme implementation for the next MTEF period.
- 1.4. The Strategic Planning Session participants will comprise of Department of Energy Management Team and Executive Members from State Owned Entities.
- 1.5. The Minister has identified the sitting of the Departmental Strategic Planning Session for the production of the 2018/19 Annual Performance Plan from the 27<sup>th</sup> to 28<sup>th</sup> July 2017.
- 1.6. In order to solicit maximum participation and to assist the participants to define the future direction and priorities of the Department, there is a need for an appointment of an external service provider to facilitate the Strategic Planning Session of the Department of Energy.

## **2. INVITATION FOR PROPOSALS/ PRICE QUOTATIONS**

- 2.1. Proposals/Price Quotations are hereby requested from suitably qualified Strategic planning practitioners/Certified Strategic Planning Companies to facilitate the Departmental Strategic Planning Session.

## **3. OBJECTIVES**

- 3.1. The strategic process aims at:
  - 3.1.1. Aligning the organizational structure to the strategy
  - 3.1.2. Defining and clarifying the DoEs approach and methodology to service delivery
  - 3.1.3. Identifying the internal and external environmental factors impacting on the organizational performance
  - 3.1.4. Considering and building on the current practices/ lessons learned and yet to contribute to the Department's preparedness to identify available opportunities within the energy environment and other spheres of government
  - 3.1.5. Provide framework to maximize on service delivery to improve the performance towards the national government key performance areas (KPAs) achievement
  - 3.1.6. Reprioritize the service delivery key programmes/projects within the available resources outlined in the Medium Term Expenditure Framework (MTEF)
  - 3.1.7. Provide a framework to facilitate resources allocation in line with priorities identified
  - 3.1.8. To assist the Department to effectively respond to the changes in the environment
  - 3.1.9. Build on existing capacity and improve its organizational performance

## **4. SCOPE OF WORK**

- 4.1. The service provider with necessary expertise and capacity will be required to undertake the following activities with regard to the above:

- 4.1.1. Design and facilitate the strategic planning process
- 4.1.2. Provide technical assistance and facilitation services in support of the strategic planning process
- 4.1.3. Analyses the external environment as well as existing programmes and define future direction, Strategy and priorities of the Department.
- 4.1.4. Develop Strategic Planning Session methodologies and materials in conjunction with the Department of Energy programme Managers.
- 4.1.5. Design and prepare innovative participatory methodologies, including mind maps and matrix maps activities emphasising discussion and focusing on building the department strengths.
- 4.1.6. The Strategic Planning Session must be participatory and must be designed to provoke critical thinking and review among participants.
- 4.1.7. Scenario Planning in the Strategic Planning process.
- 4.1.8. Facilitation of the Strategic Planning Session.
- 4.1.9. Conducting consultation with key stakeholders.
- 4.1.10. Compilation of Strategic Planning Session Report.

## **5. PROJECT OUTPUT /KEY DELIVERABLES**

- 5.1. The service provider will be expected to produce the following outputs:

- 5.1.1. Pre-workshop preparation and documentation
- 5.1.2. Methodology and draft Agenda / Programme
- 5.1.3. Project Plan and Activities.
- 5.1.4. First draft Strategic Planning Session Report.
- 5.1.5. Final Strategic Planning Session Report.

## **6. PROJECT MANAGEMENT**

- 6.1. The successful service provider in terms of project management will be expected to adhere to the following expectations:

- 6.1.1. Hold regular meetings with the Project Manager representing the Department of Energy to discuss the draft Project Plan and Activities prior to finalisation.
- 6.1.2. Assign suitable, experienced and qualified personnel to assist with the facilitation and development of the Project Plan and Activities.
- 6.1.3. Manage the overall project in consultation with the Project Manager.

## **7. REPORTING REQUIREMENT AND PROGRESS MEETINGS**

- 7.1. Meetings will be for plenary and feedback on progress shall be held, as and when necessary. The venue for these meetings will be at the Department of Energy's Head Offices, Matimba House in Pretoria. The service provider's Project Manager will be obliged to attend and will report to the Chief Director: Strategy and Risk Management. Any patents or copyright developed from this project will belong to the Department of Energy.

## **8. COMPLETION DATE**

- 8.1. The duration of the contract will be for three (3) weeks.
- 8.2. The Department reserves the right to terminate the contract during the first week after work has commenced should the appointed service provider have misrepresented themselves and/or their product and will not be in a position to fulfil the requirements as contained in the contract, which might result in the Department failing to deliver on its mandate.

## **9. PAYMENT**

- 9.1. The Department will not make an upfront payment to a successful service provider. Payment will only be made in accordance to the delivery of service that will be agreed upon by both parties and upon receipt of an original invoice.

## **10. TAX CLEARANCE CERTIFICATE**

- 10.1. The bidder is required to submit an original and valid Tax Clearance Certificate issued by the South African Revenue Services together with the bid documents before the closing date and time of the bid. **Failure to comply with this condition will disqualify the bid.**

## **11. EVALUATION METHODOLOGY**

### **11.1. Cost**

- 11.1.1. The service provider will be requested to provide a quote regarding the work to be undertaken for this project per report/deliverable. The costing for each deliverable should be aligned with the expected sub-deliverables required to accomplish the final deliverable.
- 11.1.2. The total cost must be VAT inclusive and should be quoted in South African currency (i.e. rands).
- 11.1.3. The total cost must reflect –
  - a. Fee rate of each team member;
  - b. Estimated number of hours to be spent on the assignment by each member (estimated number of hours will be deemed the maximum number of hours to do the work);
  - c. Any other costs (to be specified)
  - d. Costing should be aligned with the project activities / project phases; and
  - e. Ceiling price (all-inclusive capped total)

### **11.2. BROAD-BASED BLACK ECONOMIC EMPOWERMENT**

- 11.2.1. Provisions of the preferential Procurement Policy Framework Act (PPPFA) and its regulation will apply in terms of awarding points
- 11.2.2. Bidders are required to submit original and valid B-BBEE Status Level Verification Certificates or certified copies thereof together with their bids, to substantiate their B-BBEE rating claims
- 11.2.3. Bidders who do not submit their B-BBEE status level verification certificates or are non-compliant contributors to B-BBEE will not qualify for preference points for B-BBEE.
- 11.2.4. In the case of Exempted Micro Enterprises, the following documents **MUST** be submitted:
  - (a) Verification agencies accredited by SANAS;

### **11.3. BIDDERS WHO QUALIFY AS EME'S**

- a. Accounting officers as contemplated in the CCA; or

- b. Verification agencies accredited by SANAS; or
- c. Registered auditors (Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates)

The table below depicts the B-BBEE status level of contribution

<b>B-BBEE Status Level of Contributor</b>	<b>Number of points (80/20 system)</b>
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

#### 11.4. **COMPANY EXPERIENCE**

11.4.1. Service providers should at least have three (3) years experience in the facilitation of Strategic Planning Workshops. This should be supported by proof from three (3) contactable referees indicating that similar project/s was/were executed.

11.4.2. Failure to submit the above correspondence, bidders will forfeit points in this category.

#### 11.5. **TEAM LEADER AND TEAM MEMBERS EXPERIENCE**

11.5.1. The team leader must have at least five (5) years and team members three (3) years' experience in the execution of facilitation of Strategic Planning Workshops. Detailed CV's with three (3) contactable references must be attached as proof.

## 11.6. QUALIFICATIONS

- 11.6.1. Team leader and team members must have recognized qualification(s) in Strategic Planning/Management. Business Management will be an added advantage.
- 11.6.2. Certified copies of certificates must be attached to the proposal. Failure to attach, bidder will forfeit points in this category.

## 11.7. PROJECT PLAN

- 11.7.1. A project plan with intermediate and final outputs and identified timeframes/ milestones.
- 11.7.2. Proposed Methodology.
- 11.7.3. Management of the project.

## 12. EVALUATION CRITERIA

12.1. Bids will be evaluated on 80/20 point system as outlined in the PPPFA of 2011 as amended in 2017. The proposals will be evaluated in two phases:

**Phase 1:** Bidders will be evaluated based on functionality. The minimum threshold for functionality is **70 out of 100 points**. Bidders who fail to meet minimum threshold will be disqualified and will not be evaluated further for price and BBBEE points.

	Criteria	Weights
1.	<b>Company Experience:</b> <ul style="list-style-type: none"><li>❖ Service providers should at least have three (3) years experience in the facilitation of Strategic Planning Workshops.</li><li>❖ Proof from three (3) contactable referees indicating that similar project/s was/were executed.</li></ul>	<b>15</b>  10  5

	<b>Criteria</b>	<b>Weights</b>
2.	<p><b>Team leader</b></p> <ul style="list-style-type: none"> <li>❖ The team leader must have at least five (5) years experience in the execution of facilitation of Strategic Planning Workshops. Experience of the Energy Industry will be an added advantage</li> </ul>	<b>5</b>
3.	<p><b>Team member experience:</b></p> <ul style="list-style-type: none"> <li>❖ Team members must have at least three (3) years experience in the execution of facilitation of Strategic Planning Workshops.</li> <li>❖ CV's with three (3) contactable references must be attached as proof.</li> </ul>	<p><b>10</b></p> <p>5</p> <p>5</p>
3.	<p><b>Qualifications</b></p> <ul style="list-style-type: none"> <li>❖ Team leader must have recognized qualification(s) in Strategic Planning/Management. Business Management will be an added advantage.</li> <li>❖ Team members must have recognized qualification(s) in in Strategic Planning/Management. Business Management will be an added advantage.</li> </ul>	<p><b>10</b></p> <p>5</p> <p>5</p>
4.	<p><b>Project Plan/Approach:</b></p> <ul style="list-style-type: none"> <li>❖ A detailed project plan with agreed timeframes / milestones.</li> <li>❖ Develop Strategic Planning Session methodologies and materials</li> <li>❖ Design and facilitate the strategic planning process</li> <li>❖ Analyses the external environment as well as existing programmes and define future direction, Strategy and priorities of the Department</li> <li>❖ Scenario Planning</li> <li>❖ Management of the project (Project Management).</li> </ul>	<p><b>60</b></p> <p>10</p> <p>10</p> <p>10</p> <p>10</p> <p>10</p> <p>5</p> <p>5</p>
	<b>Total</b>	<b>100</b>



**Phase 2:**

<b>Price</b>	<b>80</b>
<b>B-BBEE compliance</b>	<b>20</b>

**For purpose of evaluating functionality, the following values will be applicable:**

<b>1=</b>	<b>Poor</b>	Will not be able to fulfill the requirements
<b>2=</b>	<b>Very poor</b>	Will partially fulfil the requirements
<b>3=</b>	<b>Average</b>	Will be able to fulfill the requirements
<b>4=</b>	<b>Good</b>	Will be able to fulfill better in terms of the requirements adequately
<b>5=</b>	<b>Excellent</b>	Will fulfill the requirements exceptionally

## **12. FORMAT AND CONTENT OF PROPOSAL**

12.1. All the official standard bidding documents (SBD) must be completed in all respects by bidders' submission of 2 copies: 1 original copy of the proposal and bid documents and **failure to comply with the bidding requirements will disqualify any bidders.**

## **13.CLOSING DATE**

Proposals must be submitted on **12 July 2017, at 11H00am**, at the Department of Energy, 192 Corner Visagie and Paul Kruger Streets, Pretoria in the bid box marked Department of Energy. **No late RFQ's will be accepted.**

## 14. ENQUIRIES

For Technical Enquiries

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