



# ENERGY OFFICE

eThekweni. The sustainable energy hub.

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## Request for Quotation eThekweni Energy Office Funding Access Support

12 February 2012

### Background

The eThekweni Municipality Energy Office is located within the Treasury Department of the municipality and is broadly responsible for energy efficiency and renewable energy program conceptualisation and initiation. One of the key constraints the Energy Office is currently experiencing is the lack of capacity to access national and external funding streams for various energy programs. There are significant funding opportunities (loan and grant) available to the public sector in the energy and climate change field. These include the Eskom Integrated Demand Management (IDM) mechanisms, Department of Energy, Energy Efficiency Demand Side Management (EEDSM) program, various incentives from the Department of Trade and Industry, various United Nations agencies, and other multilateral organizations. These funding opportunities often require detailed and complex funding applications that can involve a series of communications with the relevant funding managers.

Linked to this requirement, is the ability to develop business plans for various energy interventions. The municipality has a range of energy interventions taking place, but does not have the resource to package these projects into viable business plans. The direct result of this is the inability to adequately motivate for funding.

### Service Required

The Energy Office intends to procure a service provider to assist in the development of business plans and funding applications for various energy projects and programs. The key responsibilities of the service provider will include:

- Identification of potential funding streams
- Identification of potential projects within municipal operations to match funding opportunities
- Liaison with funding organisations
- Drafting, packaging and submission of funding proposals
- Return on investment (ROI) assessments of energy projects and programs
- Drafting of business plans

The service provider will be expected to work closely with and mentor staff members who will be provided by Energy Office and other departments within eThekweni Municipality.

## Deliverables

The nature of the deliverables will be closely linked with the funding opportunities that become available through the duration of the contract. It is therefore not possible to clearly define the deliverables. However at the very least, the following will be expected from the service provider:

1. Developing and packaging of 4 funding proposals
2. Developing 3 business plans for municipal operations energy programs

It is further expected (although not obligatory) that the amount of grant funding secured with the assistance of the service provider will exceed the cost of the award of this quotation process.

## Timeframe and Budget

The timeframe for this contract will be 9 months, starting in mid March 2012 and terminating in mid December 2012 (depending on the finalisation of the procurement process). The appointment will be done through a competitive bidding process and will be adjudicated according to 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>".

## Adjudication Criteria

The quotations will be assessed through a 2 step process. The first step is a functionality assessment and service providers must score a minimum of 70 points (out of 100) in order to be assessed any further. Step 2 is adjudicated according to price and preferential procurements. The scores for functionality are calculated as follows:

<b>Step 1: Functionality</b>	<b>Score</b>
<b>International Donor/Multilateral Experience</b> Please provide a detailed description of the team member's experience working with international Donor/Multilateral agencies in the Energy or Urban Development Sector. <ol style="list-style-type: none"><li>1) Direct experience with 2 or more agencies (25 Points)</li><li>2) Direct experience with 1 agency (15 Points)</li><li>3) No Experience (0 Points)</li></ol>	25
<b>National Grant Funding Agency Experience</b> Please provide a detailed description of the team member's experience working with National Grant Departments /Organisations in the Energy or Urban Development Sector. <ol style="list-style-type: none"><li>1) Direct experience with 2 or more agencies (25 Points)</li><li>2) Direct experience with 1 agency (15 Points)</li><li>3) No Experience (0 Points)</li></ol>	25
<b>Grant Funding Application Experience</b> Please provide a detailed description of the team member's experience in successfully accessing grant funding in the Energy or Urban Development Sector. <ol style="list-style-type: none"><li>1) Successful experience with 2 or more funding applications (25 Points)</li><li>2) Successful experience with 1 fund application (15 Points)</li><li>3) No successful fund applications (0 Points)</li></ol>	25
<b>Business Plan Development Experience</b> Please provide examples of business plans developed by team member's in the Energy or Urban Development Sector.	25

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

<b>Step 1: Functionality</b>	<b>Score</b>
1) 2 or more business plans developed (25 Points)	
2) 1 business plan developed (15 Points)	
3) No business plan developed (0 Points)	
<b>TOTAL</b>	<b>100</b>

Service providers must score a minimum of 70 points for functionality to be assessed further. The scores for price and procurement are calculated as follows:

<b>Step 2: Price and Preferential Procurement</b>	<b>Score</b>
1) Price including project management, VAT and all other costs	80
2) Preferential Procurement (FPLITE Score)	20

### **Submission Requirements**

Quotations should include the following information:

- 1) Detailed description of the team member's experience working with international Donor/Multilateral agencies in the Energy or Urban Development Sector.
- 2) Detailed description of the team member's experience working with National Grant Departments /Organisations in the Energy or Urban Development Sector.
- 3) Detailed description of the team member's experience in successfully accessing grant funding in the Energy or Urban Development Sector.
- 4) Examples of business plans developed by team member's in the Energy or Urban Development Sector.
- 5) Budget breakdown, inclusive of:
  - a. Hour rates for team member/s for 4 funding proposals and 3 business plans
  - b. Travel and disbursement costs
  - c. VAT
  - d. Total Cost
- 6) CVs of Team Member/s
- 7) Supporting Documents
  - a. Signed Declaration (see Annexure 1)
  - b. Copy of Valid Tax Clearance Certificate.
  - c. Copy of latest utility bill.
  - d. Focussed Procurement Lite registration details (<http://fplite.durban.gov.za/>)

The eThekwini Energy Office does not bind itself to accept any quotation, and reserves the right to accept a portion of any quotation, unless the supplier expressly stipulates otherwise in their quotation. The eThekwini Energy Office does not undertake to consider quotations received after the due date and time unless clear evidence of dispatch is available (e.g. postage stamp with date). Quotations should be submitted preferably by email.

Please submit your quotation (preferably by email) by 11:00am on the 28<sup>th</sup> February 2012 to:

Derek Morgan

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

3<sup>rd</sup> Floor Florence Mkhize Building

251 Anton Lembede Street, Durban

Tel: 031 311 11 39

**Annexure 1: Declaration (Request For Quotations - eThekwini Energy Office Funding Access Support)**

\_\_\_\_\_ (Name of Service Provider) hereby state:

- 1) Is the service provider is a natural person (Yes/No)
  - a. If the service provider is a natural person, has the service provider been is in the service of the state, or has been in the service of the state in the previous twelve months; (Yes/No)
  - b. If Yes, please provide details

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- 2) If the service provider is not a natural person, are any of its directors, managers, principal shareholders or stakeholder is in the service of the state, or has been in the service of the state in the previous twelve months; (Yes/No)
  - a. If Yes, please provide details

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- 3) If the service provider is not a natural person, has a spouse, child or parent of the provider or of a director, manager, shareholder or stakeholder referred to in subparagraph (2) is in the service of the state, or has been in the service of the state in the previous twelve months. (Yes/No)
  - a. If Yes, please provide details

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**Service Provider**

Date:

Name:

Designation:

Signature: