



P.O. Box 13912, HATFIELD, 0028 | 2nd Floor, Block E, Hatfield Gardens, 333 Grosvenor Street, Hatfield, PRETORIA, 0028,
Tel: +27 012 748 1000, Fax: +27 086 667 8894

VAT No.: 496 026 5751

BID/RFQ NUMBER:	RFQ0002616
CLOSING DATE:	23 January 2023
CLOSING TIME:	11:00 a.m
BID VALIDITY PERIOD:	90 days
DESCRIPTION OF BID:	Microsoft Power BI Risk Management Reporting Tool
Please Indicate whether the bidder is a: Service Provider or Independent Consultant	
RFP/ RFQ TO BE EMAILED TO THE FOLLOWING EMAIL ADDRESSES:	
Email address:	
Beullah@sanac.org.za	
Copied: Madoda@sanac.org.za	
Copied: Mbali@sanac.org.za	
Both Email and Hardcopy Submission are Accepted for this request	



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ToR – Microsoft Power BI Risk Management Reporting Tool

1. Purpose

The purpose of this RFQ is to procure the services of a service provider to develop a Risk Management Dashboard for Reporting using Microsoft Power BI Technology Platform and facilitate Training on Risk Management Principles for the SANAC Trust.

2. Background

In keeping up with the pace of digitalization that is currently affecting all sectors of the economy across the globe, the SANAC Trust wishes to enlist the services of a qualified service provider to partner with and to collaborate on the development of a Risk Management Reporting Tool using Microsoft Office 365 Power BI as an underlying technology.

3. Scope of Work

Application Capabilities	<ul style="list-style-type: none">▪ Develop two (2) base reports for Monthly and Quarterly Strategic Operational Risk Reporting.▪ Develop six (6) base reports for Monthly and Quarterly Operational Risk Reporting.▪ Single sign-on Office 365
Application Guides	<ul style="list-style-type: none">▪ Develop and document a best practice guide for development of the reporting dashboards.
Risk Management Training for Risk Champions	<ul style="list-style-type: none">▪ Develop Training Manual on Risk Management Principles▪ Facilitate training to a minimum of 10 people for a period of one (1) day.



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4. Deliverables

The successful bidder is expected to complete and submit the following deliverables within the approved timelines:

- a. A Business Requirement Document (BRD) and Application Designs.
- b. A fully operational (Live) Power BI Risk Management Reporting Dashboards Application.
- c. A Training Manual and facilitated training on Risk Management Principles

5. Project Time lines

The bidder is expected to complete the project within 30 days from the date of award.

6. ASSIGNMENT MANAGEMENT ARRANGEMENTS

The bidder will work under the overall guidance of the Risk Management and Strategic Information Units

7. Evaluation Criteria

Bidders must score a minimum of 70/100. The cheapest proposal with a minimum score of 70 will be selected. In the event that the price and points are the same for two bidders, then the most experienced bidder will be considered.



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Stage 1: Functionality

Category	Evaluation Criteria	Score
Written Reference Letters	Bidders must provide details of at least one (1) company where they have designed and implemented a relevant Power BI Solution.	20
Qualifications	Bidders are required to provide relevant for: <ul style="list-style-type: none"> • Microsoft Power BI certifications for 1 key personnel. • Risk Management certifications for 1 key personnel Kindly attach certified copies of relevant qualification/s.	15 15
Individual Experience	Kindly attach Abbreviated CV (not longer than two page each) of the two (2) key personnel. Knowledge and Understanding of Enterprise Risk Management is key. Knowledge and Understanding of Software Development is key. Only two (2) CVs of key personnel will be considered for evaluation purposes.	10 10
Solution Development and Implementation Approach	Bidders are required to provide a Solution Development and Implementation Approach for the delivery of the scope of work and approach to be taken and a project plan that addresses the deliverables with clear milestones.	30

Stage 2: Price and BEE

Evaluation Stage 2: Price

Bidders who obtained 70 on Functionality will be evaluated on Price & BEE using preference point system of 80/20 as per the below table:

Preference point system (80/20)	Weighting percentage
Price	80% of 100 Points
BEE	20% of 100 Points
Total:	100%



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i. Price Calculations

A maximum of 80/20 point system has been allocated to this bid on the following basis:

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{\min} = Price of lowest acceptable bid

ii. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

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



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8. SUBMISSION OF PROPOSALS

Section	Title
1.	Technical Proposal demonstrating ability to complete the assignment and produce a quality document as per scope of work detailed above
2.	Quotation - Price proposals should include VAT and should be fully inclusive of ALL costs to deliver the outputs indicated in the terms of reference
3.	Evidence of having completed similar assignment (must include at least one reference letter)
4.	The CVs of the proposed key personnel to undertake the work all individuals to be involved in the assignment.
5.	Compliant Tax PIN
6.	Valid B-BBEE Certification: <ul style="list-style-type: none">• A signed Exempt Micro Enterprise (EME) affidavit with the required information; or• A signed Qualifying Small Enterprise (QSE) affidavit with the required information. or <ul style="list-style-type: none">• BEE Certificate
7.	Recent Central Supplier Database (CSD) with complaint tax pin, BEE and Company registrations.