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Department:
Statistics South Africa
REPUBLIC OF SOUTH AFRICA

SECTION A: TRAINING REQUEST SPECIFICATION

Name of Training Requested: ADVANCED MICROSOFT EXCEL– NON-ACCREDITED
TRAINING PROGRAMME

Duration: Between 3 -5 days

Total No. of Trainees: 11 **Venue:** Facilitators Venue

Learning Method: ☒ Face-to-Face ☐ Virtual ☐ E-Learning ☐ Blended Learning

LEARNING CONTENT

Please indicate the learning content/topics required for the training programme:

1.	Introduction to Advanced Microsoft Excel Introduction to advanced Microsoft Excel features and capabilities, including efficient spreadsheet management, workbook navigation, data organization, and the use of advanced tools to improve workplace productivity.
2.	Advanced Excel Formulas and Functions Understanding and application of advanced Excel formulas and functions, including logical, lookup, text, date and time, mathematical, statistical, and financial functions to perform complex calculations and solve business-related problems.
3.	Data Management and Analysis Understanding and application of Excel tools for managing, organizing, and analysing data, including Excel tables, sorting, filtering, data validation, conditional formatting, and other data-management techniques.
4	PivotTables, Pivot Charts and Data Visualization Creation and application of PivotTables and Pivot Charts to summarize, analyse, and interpret large datasets. Development of professional charts, reports, and visual presentations to communicate information effectively.
5	Advanced Reporting, Dashboards and Practical Application Development of professional Excel reports and dashboards using advanced formulas, charts, PivotTables, slicers, conditional formatting, and other Excel tools. Application of advanced Excel skills to practical workplace and business scenarios, including data cleaning, linking worksheets and workbooks, workbook protection, and basic automation where applicable

LEARNING OUTCOMES

ADVANCED MICROSOFT EXCEL– NON-ACCREDITED

At the end of the training, participants should be able to:

1	Explain and apply advanced Microsoft Excel features to create, manage, and maintain professional spreadsheets and workbooks.
2	Use advanced Excel formulas and functions , including logical, lookup, text, date and time, mathematical, statistical, and financial functions to perform complex calculations and solve workplace-related problems
3	Manage and analyse data effectively using Excel tables, sorting, filtering, data validation, conditional formatting, and other data-management tools.
4	Create and use PivotTables and Pivot Charts to summarize, analyse, and present large datasets effectively. Create professional Excel reports and dashboards using charts, slicers, PivotTables, conditional formatting, and other data-visualization techniques
5	Apply advanced Excel skills to real-world workplace situations , including data cleaning, worksheet and workbook linking, workbook protection, reporting, analysis, and basic automation where applicable.

2. PARTICIPANT CHOICE: NON-CREDIT-BEARING COURSE/S ☐

Supplier Requirements

For non-credit-bearing courses, suppliers must:

- Provide proof of legal registration/legitimacy.
- Provide relevant industry or professional accreditation/recognition, where applicable.
- Provide facilitator qualifications and CVs.
- Provide relevant learning content.
- Provide clear learning outcomes.
- Provide the training methodology.
- Provide assessment methodology, where applicable.
- Provide evidence of previous experience in delivering similar training.
- Demonstrate the capacity and resources to deliver the programme.
- Provide appropriate training manuals/workbooks and learning materials.
- Clearly state the type of certificate that will be issued.

Participant Assessment Type

☐ Class Test

☐ Practical Exercise

☐ Group Work

☐ Presentation

☐ Assignment

☐ Case Study

☐ Other: _____

Award / Recognition

☐ Certificate of Attendance

☐ Certificate of Completion

☐ Certificate of Competency, where applicable

☐ Other: _____

Note: A certificate issued for a non-credit-bearing course does not constitute an NQF qualification or credit-bearing award.

PARTICIPANT: - TRAINING REQUEST SPECIFICATION APPROVAL AND ENDORSEMENT

The undersigned confirm that the training specification/request has been reviewed and is supported.

Directorate Representative: Initials & Surname: JM Dimy

Directorate: HRM & D Branch Corporate Services

Signature: [Signature]

Date: 01/10/26

SECTION B: SERVICE PROVIDER REQUIREMENTS

EVALUATION CRITERIA

The evaluation process will be conducted in two stages as given on the table below:

Evaluation stages

Stage	Description
Stage 1	Technical Evaluation
Stage 2	Price and specific goals

Stage 1

TECHNICAL REQUIREMENTS

The table below explains the requirements that supplier's/service providers must meet when responding to the training specification in Section A.

No.	Supplier Requirement	Explanation	Type of Document / Evidence Required
1	Company Registration	Proof of Company Registration: Valid CIPC Company Registration Certificate, SARS Tax Compliance Status, and B-BBEE Certificate/Affidavit , where applicable.	Proof of registrations
2	Academic Qualification	Facilitator Requirements: • A Matric Certificate. • A Diploma or Degree in Information Technology, Computer Science, Data Analysis, or a related field. • Relevant experience in Microsoft Excel training and data analysis. A Train-the-Trainer (TTT) qualification or equivalent training/facilitation experience would be advantageous.	Certified proof of qualifications
3	Facilitator CVs and qualifications	• Supplier must provide details of the person(s) who will conduct the training.	Detailed CVs, copies of qualifications and certificates
4	Learning content and outcomes	Supplier must show how the proposed course will address the required topics and what participants will learn.	Detailed course outline, programme/content document and learning outcomes
5	Quality assurance	Supplier must demonstrate how it will monitor the quality and effectiveness of the training at the end of the session.	Quality assurance policy/process, participant evaluation form, training evaluation report template and feedback process

N.B: Failure to comply with all technical requirements will result in disqualification and bidder will not be evaluated further.

TRAINING MANUAL / LEARNING MATERIAL REQUIREMENTS

The supplier must provide appropriate and comprehensive learning materials relevant to the requested training.

Training Manual/Learner Guide: ☒ Yes ☐ No

Workbook: ☒ Yes ☐ No

Presentation Slides: ☒ Yes ☐ No

Practical Exercises: ☒ Yes ☐ No

Other Learning Materials:

TRAINING SPECIFICATION APPROVAL AND ENDORSEMENT

HRU&D: Training and Development

The undersigned confirm that the training specification/request has been reviewed and is supported.

Designation: Skills Development Facilitator (SDF): Initials & Surname SL MNGOMEZULU

Signature: 

Date: 01 / 10 / 2026

Supporting on Section B- Qualified and experienced facilitators:

SERVICE PROVIDER REQUIREMENTS Point Number 2

Name the actual qualifications that a trainer could have, examples include:

Training Subject	Appropriate Trainer Qualification
Advance Excel	• A Diploma or Degree in Information Technology, Computer Science, Data Analysis, or a related field. • Relevant experience in Microsoft Excel training and data analysis. A Train-the-Trainer (TTT) qualification or equivalent training/facilitation experience would be advantageous.

Stage 2: Price and specific goals

Price = 80

Preferential points = 20 as follows:

THE SECOND STAGE OF EVALUATION IS BASED ON PRICE AND SPECIFIC GOALS, WHICH WILL BE EVALUATED USING THE FOLLOWING CRITERIA AND POINTS:

POINTS AWARDED FOR PRICE

Price evaluation (80 points)

Criteria	Points
Price evaluation $Ps = 80 \left(1 - \frac{Pt - P \min}{P \min} \right)$	80

The following formula will be used to calculate the points for price:

Where:

Ps = Points scored for comparative price of bid under consideration

Pt = Comparative price of bid under consideration

Pmin = Comparative price of lowest acceptable bid

POINTS AWARDED FOR SPECIFIC GOALS (20 POINTS)

The specific goals allocated points in terms of this bid	Number of points allocated (80/20 system)	Percentage ownership equity (To be completed by Tenderer)	Number of points claimed (80/20 system) (To be completed by Tenderer)
. Race (black)	10		
. Women	5		
. Disabled	2		
. Youth (below 35 years)	3		

- Stats SA reserves the right to require of the bidder, either before a tender is adjudicated or any time subsequently, to substantiate any claim regarding preferences in any manner required.
- The following formula must be applied to calculate the number of points for equity ownership by an Historical Disadvantaged Individuals (HDI):

$$NEP = NOP \times \frac{EP}{100}$$

Where:

NEP = Points awarded for equity ownership by an HDI

NOP = The maximum number of points awarded for equity Ownership by an HDI

EP = The percentage of equity ownership by an HDI Within the enterprise or business

- c. Bidders who wish to claim points in terms of the tables above, need to provide proof for each point claimed as guided below:
- d. Race: (Black) - attach certified copy of Identity document (Id) and certified company registration document, CSD full detail report to show substantiate ownership equity.
 - e. Women: - attach certified copy of Identity Document (ID) and certified company registration document, CSD full detail report to show substantiate percentage ownership equity.
 - f. Disabled – attach medical certificate from a medical practitioner registered with the Health Professional Council of South Africa (HPCSA) confirming the disability.
 - g. Youth – attach certified copy of Identity Document (ID) and certified company registration document, CSD report to show substantiate percentage ownership equity.
- **CIPC and Identity documents, with a certification stamp older than 6 months, will be considered invalid. Such documents will result in forfeiture of points allocated for specific goals.**

TRAINING SPECIFICATION APPROVAL AND ENDORSEMENT

Supply Chain Management: Acquisition

The undersigned confirm that the training specification price and specific goals has been reviewed and is supported.

Designation: _____ Initials & Surname_____

Signature: _____ Date: ____ / ____