**PANEL APPLICATION**

|  |  |  |
| --- | --- | --- |
|  | | **Tick to indicate Lots being Applied for** |
| **Establishment of a Panel for Mentoring in various Lots** | **Lot 1 Finance** |  |
| **Lot 2 Business** |  |
| **Lot 3 Social Media & Digital Marketing** |  |
| **Lot 4 Sales and Marketing** |  |
| **Lot 5 Human Resources** |  |
| **Lot 6 International Trade** |  |
| **Contracting Authority** | ***Carlow County Council***  ***(Local Enterprise Office Carlow)*** | |
| **Duration** | ***Up to a maximum of three (3) years*** | |
| **Procedure** | ***Restricted*** | |
| **Issue Date** | **22nd December 2016** | |
| **Closing Date for Queries** | **18th January 2017 @ 12noon** | |
| **Email for Queries** | [kcomerford@carlowcoco.ie](mailto:kcomerford@carlowcoco.ie) | |
| **Closing Date / Time For receipt of Completed Questionnaires** | **20th January 2017 @ 12noon** | |
| *Please note:*   * *that information relating to this Application, including clarifications and changes, will be published on the Irish Government Procurement Opportunities Portal (www.etenders.gov.ie). Registration is free of charge and there is no charge for documents. Please note that the Contracting Authority cannot accept responsibility for information relayed (or not relayed) via third parties.* * *that the closing date above is for administrative purposes and to ensure that your response is eligible for consideration for the initial tranche of work. Applications may be made at any time during the four (4) year life of the panel.* | | |

# Introduction

The Local Enterprise Office, Carlow (LEO Carlow) promotes and supports micro enterprises and people thinking of starting their own business in the region. The main supports are business information services, training, mentoring, business networks and financial supports for qualifying businesses.

The Local Enterprise Office (LEO) provides advice, information and support to those interested in starting up a new business or already in business including entrepreneurs, early stage promoters, start-ups, and small businesses.

The LEO Mentor Programme is designed to match up the knowledge, skills, insights and entrepreneurial capability of experienced business practitioners with small business owner/ managers who need practical and strategic advice and guidance. The mentor contributes independent, informed observation and advice to aid decision making.

**Role Purpose:**

LEO Carlow is compiling a panel of mentors, from which future mentor assignments for a 3-year period will be selected. Applications are invited from mentors with appropriate skills and experience that wish to be included in the LEO Carlow mentor panel.

Minimum selection criteria will apply and not all applicants may be awarded a place on the panel.

The role of the mentor is to share wisdom gained from experience and learning. The mentor’s principal function is to listen and to ask questions.

They help the clients explore their business goals and ideas for the future and to help them realistically appraise their current situation. As business plans develop the role is to challenge and support the execution of the client’s plans and to assist them to keep track of their objectives.

Mentors are not encouraged to solve the problems for the client, rather to help clients develop the capability to solve their own problems. Mentors do not carry out the work on behalf of the client but can be a source of guidance and advice for them. The mentor may offer advice and opinion, but the mentor is not a consultant. Responsibility for decision-making rests solely with the client.

**Functional Competences/Characteristics of Mentors:**

It is expected that the person approved as a LEO mentor will possess the following functional competences: -

• Good knowledge of broad issues facing Irish industry and services companies, particularly issues affecting the support and development of micro-enterprise

• Excellent administrative skills together with the ability to successfully organise and prioritise work

• Sound judgment as well as good communication

• Computer literate with knowledge of relevant applications including Word, Excel, PowerPoint and Outlook

• Mentoring / Coaching skills including:

* Empathy
* Listening without judging
* Challenging
* Questioning
* Sharing
* Non - directive
* Supporting
* Business counselling skills
* Business planning
* Project management
* Business knowledge of and expertise

### Experience:

The mentor will possess some or all of the following: -

* At least three years management experience working in or with small businesses.
* Relevant experience working in an area where particular professional or technical skills may have been developed that are transferable to micro enterprise.
* Previous experience of delivering mentoring assignments to micro enterprise clients would be desirable
* Relevant third level qualifications are desirable.

# Overview of Panel

LEO Carlow wishes to establish a panel for the provision of mentoring services. Applicants will be assessed and shortlisted for inclusion on the panels on the basis of information received on their economic and financial standing and technical capacity. The panel to be established by way of lots is as follows;

**Lot 1 Finance**

**Lot 2 Business**

**Lot 3 Social Media & Digital Marketing**

**Lot 4 Sales and Marketing**

**Lot 5 Human Resources**

**Lot 6 International Trade**

Candidates can apply for one or more Lots.

**2.1 Rates**

One-to-one mentoring services rates are generally payable at a maximum of €175 per session. Other services (including business advice clinics) are generally payable at a maximum of €40 per hour depending on the volume and scope of the work involved.

LEO Carlow may ask applicants to attend a meeting in order to clarify aspects of their submissions.

Note: this process refers to the provision of a service to LEO Carlow and will not lead to a contract of employment within LEO Carlow.

Successful members will engage with LEO Carlow as contractors or through Limited Companies for the supply of services.

**2.2 Insurance**

The successful candidate(s) shall be required to hold relevant insurance for the purpose of the work with Carlow County Council.

**2.3 Compliant Tenders**

* **Economic and Financial Standing**

All candidates must demonstrate that they have the required economic and financial standing and candidates should declare in the self-declaration (A5) information regarding their financial standing. Tenderers will either pass or fail this qualification criterion:

Candidates are required to confirm that their turnover in the last 3 years was on average above €10,000.

* **Technical and Professional Ability**

All candidates must demonstrate that they have the required technical and professional ability and must furnish the required documentation with their applications. Candidates will be scored against the qualitative criteria set out in Qualification Questionnaire.

Candidates must demonstrate that they have the level and depth of experience to provide high quality services in relation to the requirements as set out in the application.

Candidates should note that economic operators relying on the capacity of other entities must submit with their application an undertaking, duly evidenced, from those entities that they will place the necessary resources at the disposal of the candidate.

# Duration of Panel

LEO Carlow will establish panels of mentors under the various Lots. These mentors will be required to take mentor assignments and to be available for other various jobs involving LEO activity. These activities include, but are not limited to, general business advice clinics and to represent LEO Carlow at various events etc. The panel will be established for up to a 3 year period subject to funding being available. Successful panel members will need to update their CVs/profiles annually, should there be any changes to same.

# Estimated Value of the Panel

The estimated spend on mentoring across all panels in 2016 was €40,000 in total.

It is emphasised, however, that this figure is provided strictly for indicative purposes only as there is no guaranteed expenditure under the agreement.

# Panel Requirements

## 5.1 Mentoring

All mentors (even existing ones) will have to apply in order to be placed on the panel. Some are entrepreneurs and others may have worked in a specific business related industry. We will require mentors with specialist skills and sectoral knowledge for other types of work. Given the wide range of activities LEO Carlow now intends to establish a panel to cater for these activities as follows:

|  |  |
| --- | --- |
| ***Lot*** | ***Rate applicable*** |
| **Lot 1 Finance** | **€175 per session including reporting** |
| **Lot 2 Business** | **€175 per session including reporting** |
| **Lot 3 Social Media &Digital Marketing** | **€175 per session including reporting** |
| **Lot 4 Sales and Marketing** | **€175 per session including reporting** |
| **Lot 5 Human Resources** | **€175 per session including reporting** |
| **Lot 6 International Trade** | **€175 per session including reporting** |

Candidates can apply for one or more Lots. For a list of competencies for each Lot, see section B1d.

Typically mentoring takes place in the LEO Carlow or off-site and each session is usually 3 hours in duration.

Mentors are retained on the panel for the three (3) year period, subject to satisfactory performance and professional service. This will also be subject to submitting relevant updated information annually. Each candidate who is placed on a mentor panel will be issued with the LEO mentor manual, including a code of conduct.

Mentoring services are classified under Title III services and are therefore not subject to the detailed requirements for compliance with the Public Procurement Directives.  On that basis LEO Carlow proposes to establish a panel comprising several mentors (see Lots above) being admitted to the panel under each of the competencies listed in section B1d for administrative and operational reasons.

The Mentoring Programme is subject to client needs and budgetary constraints. Individual mentor performance will be continually monitored over the term of the contract. Quality of service will be the main criteria for measuring performance. LEO Carlow will assess regular feedback from LEO mentor clients. The successful tenderer shall ensure the quality of service is of the highest order including satisfaction rankings and adherence to the Code of Conduct.

## 5.2 Other Activities

LEO Carlow may require other related activities to be carried out from time to time. Candidates can indicate their interest in these activities in section B3. Details on these other activities are set out below, please note that this list is not exhaustive.

### 5.2.1 General Business Advice Clinics / Business Needs Analysis (Screening)

Mentors from Lot 2, Business would be considered for this activity. Mentors would be based in the LEO Carlow office for this activity and it would require 4 – 7 hours per day to provide one-to-one business advice clinics to assist those who are thinking about starting out in business or those who have an existing business and are at a stage where they need some direction and advice. The role of the clinic is to identify the business needs of the client and match them with an appropriate mentor.

### 5.2.2 Other Services

From time to time, mentors will be requested to represent LEO Carlow. Mentors from Lots 1 - 6 will be chosen based on their experience relevant to the activity. Set out below is a list of the type of services that may be required:

* Representing LEO Carlow at events
* Manning a stand at a trade show
* Co-ordinate and administer LEO Carlow events
* Judging Business Awards
* School Presentations
* Preparing grant Applications for the LEO Carlow Evaluation & Approval Committee
* Writing Reports
* Writing articles on enterprise for promotion & awareness or advice and information
* Researching relevant entrepreneurial activities for the LEO Carlow
* Any other task considered relevant for the panel of mentors
* IBYE (Ireland’s Best Young Entrepreneur)

5.2.3 **Other Sectoral Projects**

Mentors from Lots 1 - 6, with relevant sectoral knowledge, may be required to work on other projects. An example of this is the Trading Online Voucher (TOV). This would involve:

* Assisting client Applications and endeavouring to have Applications submitted to deadlines (up to 1 hour typically)
* Processing Applications, submitting reports and evaluations/recommendations (1-2 hours typically)
* Facilitating drawdowns of funding

Mentors shall not invest directly (or indirectly through any kind of investment vehicle or intermediary) in any enterprise participating in the Mentoring Programme.

* 1. **How the Panel will work**
     1. This panel is advertised on the basis of 3 years and at all times subject to the availability of funding.
     2. It is envisaged that the panel will commence operation by March 2017
     3. Qualifying for a panel, does not constitute an award of a contract.
     4. In order to qualify for this panel an application must be completed and returned.
     5. Admission to the panel will be conditional upon the successful candidates agreeing to the terms and conditions of the panel, a copy of which will be provided on admission to the panel and which will include requirements for the successful Candidates to provide a current Tax Clearance Certificate and Professional Indemnity Insurance. The criteria for admission to the panel will be subject to your achieving the minimum score (6000) or higher in the application at Appendix A.
     6. Assignments under the Lots will be allocated to candidates as follows:
        1. By selection of the most suitable person available in the relevant Lot for the particular assignment on the basis of their expertise as set out in their Application.
        2. Where the nominated person is not available due to existing commitments then LEO Carlow will allocate the assignment to the next most appropriate person, based on their Application.
     7. **Organisations/suppliers may apply at any time for inclusion on the panel but should be registered by 20th January 2017 in order to be considered for the first block of contracts.**
     8. Mentors will report to the Head of LEO Carlow or his/her designate, and will provide a detailed report on a monthly basis which will include a comprehensive timesheet outlining work completed, dates, hours worked, tasks completed, outputs, and any further information that may be required in keeping with the delivery of the role. The preparation of these timesheets and monthly reports will ordinarily be undertaken in the mentor’s own time. Payment will be subject to receipt of the completed time sheet and report.

## 5.4 Confidentiality

LEO Carlow requires that all information made available to the contractor in the course of this project be treated in strict confidence unless indicated otherwise in particular instances. Mentors will sign a confidentiality agreement prior to commencement on the panel.

The mentors shall at all times keep confidential and shall not, without the prior written consent of LEO Carlow, use for its own benefit or purpose or the benefit or purpose of a third party or disclose to any third party any information of a confidential nature (including any trade secrets and information of commercial value) which may become known to it by virtue of it providing services pursuant to their membership of the Mentoring and Related Services Panel, unless such information is in the public domain (other than by breach of this provision) or the information is required to be disclosed by law. The mentor shall take all reasonable steps to ensure that its employees, agents and sub-contractors (if permitted by the terms of this contract) are bound by the same obligation.

## Conflict of Interest

5.5.1 Any conflicts of interest involving an applicant (or group of applicants in the event of a consortium bid) must be fully disclosed to LEO Carlow, particularly where there is a conflict of interest in relation to any recommendations or proposals put forward by the tenderer (See Conflict of Interest Declaration in A4.2).

* + 1. Any registerable interest involving the applicant and LEO Carlow, members of the Government, members of the Oireachtas or employees of LEO Carlow or their relatives must be fully disclosed or should be communicated to LEO Carlow immediately upon such information becoming known to the applicant, in the event of this information only coming to their notice after the submission of a bid and prior to the award of the contract. The terms 'registerable interest' and 'relative' shall be interpreted as per the Ethics in Public Office Act, 1995.
    2. Mentors shall not invest directly (or indirectly through any kind of investment vehicle or intermediary) in any enterprise participating in the Mentoring Programme.

# Instructions to Candidates

## 6.1 Queries

An application means the submission by a candidate of a completed application and associated appendices.

Every effort has been made to ensure that this document contains all the necessary information for the completion of applications. LEO Carlow does not warrant or represent that this document, or any other information given to candidates, is accurate or complete. No liability is accepted for any error, misstatement, or omission (negligent or otherwise) in this document, or in any other information given to candidates.

All clarifications/additional information will be issued via the e-tenders website ([www.etenders.gov.ie](http://www.etenders.gov.ie)) and will be made available to all potential candidates who have noted their interest on the e-tenders website.

All queries should be submitted on or before **18th January 2017 by 12 noon** to enable clarifications to be issued to all interested candidates prior to the deadline date for the receipt of applications.

## Completing the Application

When completing the application contained in Appendix 1 to this document, candidates should note the following conditions:

* All questions must be completed in full and without reference to other documents or other parts of the application.
* All questions should be answered with relevance to the subject matter of this competition. For the avoidance of doubt, it is emphasised that the information requested in the application is aimed solely at determining the suitability and choice of candidates for admission to the panel(s).
* Where a ‘Rule’ is associated with a particular criterion, candidates must satisfy the requirements of the rule in order to remain eligible for consideration in the competition.
* Candidates are permitted to add lines to the pro-forma tables and boxes set out within the application if required.
* The application must be completed in English or Irish and where copies of original documents are provided in languages other than English or Irish, a complete and accurate English translation should be provided or the documents will not be considered during the evaluation process.
* All financial information should be denominated in euro (€), except where financial information is being provided in a certified or audited supporting document such as a set of financial statements in which case it is sufficient for the information to remain in its original currency.
* Failure to provide a sufficient level of detail or to explain adequately any relevant matters

may result in such data or information not being taken into account during the evaluation process.

* Candidates for qualification may include individuals, partnerships, limited companies, groupings or any combination of the foregoing with or without legal personality as long as a Tax Clearance Certificate is provided to the LEO Carlow. However, a grouping if successful will be required to establish legal personality in order to enter into the contract.
* Candidates are reminded that they may rely on the resources of other entities in order to establish the suitability requirements on condition that they can prove to the satisfaction of LEO Carlow that they will have these resources at their disposal when necessary.
* If the application is from a consortium / joint venture candidates must ensure that all the relevant information is provided and where necessary provide the information requested separately for each party. The consortium must appoint a single supplier who will assume overall responsibility for delivery, and who is authorised to sign a contract on behalf of all consortia members. LEO Carlow will not act as an arbitrator between members of project consortia.
* Candidates are strictly prohibited from discussing any aspect of their application for this competition with other candidates or otherwise exchanging information or colluding in respect of the project. Any candidate who fails to comply with this requirement may be disqualified.
* LEO Carlow is not responsible for and will not pay for any expense or cost incurred or loss suffered by a candidate in the preparation or submission of its application or otherwise. Furthermore, LEO Carlow is not responsible for any travel or accommodation costs incurred by the candidate unless previously agreed in writing by LEO Carlow. Each candidate is fully responsible for the entirety of all expenses and/or costs it incurs in the presentation or submission of an application or in participating in this process and competition.

## Submission of Applications

Applications should be submitted in both soft copy in Word format on a USB drive and hard copy **(2 copies),** along with all supporting documents, and clearly marked / indexed identifying the Lots that are being applied for (**separate envelope to be submitted for each Lot tendered**):

**“Panel of Mentors**

**Local Enterprise Office, Carlow”**

**Carlow County Council**

**Athy Road**

**Carlow**

The latest administrative date for receipt of applications (hard and soft copy) for this notice shall be **20th January 2017 @ 12noon**

**Please note that this is an administrative closing date to facilitate the establishment of the panel and there is no closing date for Applications for inclusion on the panel. Applications for inclusion on the panel may be made at any time.**

## Opening and Evaluation of Applications

Applications will be evaluated in accordance with the selection criteria, minimum rules and weightings specified in the application.

## Clarification of Applications

While not being obliged to seek clarifications from candidates, LEO Carlow reserves the right, at its absolute discretion, to ask candidates for clarification or elaboration of their applications to assist in its evaluation of applications.

However, it is stressed that LEO Carlow will not seek clarification where any of the pass requirements set out in the application have not been met. Therefore, candidates should pay particular attention to ensure that their applications contain all the required information as even small administrative errors (such as failure to sign or date a declaration) will not be clarified by LEO Carlow where the required information forms part of the pass requirement.

## Admittance of Panel Members

All applications will be evaluated in line with the criteria and rules outlined in Appendix 1.

Assignments under the Lots may be allocated as follows:

1. By selection of the most suitable person available in a Lot for the particular project on the basis of their expertise
2. Where the nominated person is not available due to existing commitments then the next most appropriate person will be consulted and allocated the work

## Interference

Any effort by the Candidate to unduly influence LEO Carlow, relevant agency personnel or any other relevant persons or bodies in the process of examination, clarification, evaluation and comparison of applications and in decisions concerning the award of the contract shall have their application rejected.

In accordance with Section 38 of the Ethics in Public Office Act 1995 any money, gift or other consideration from a person holding or seeking to obtain a contract will be deemed to have been paid or given corruptly unless the contrary is proved.

## Inducement to Purchase

LEO Carlow shall be entitled to disqualify a candidate in one of the following circumstances:

1. if the candidate has offered or given or agreed to give to any person any gift or consideration of any kind as an inducement or reward for doing or forbearing to do, or for having done or forborne to do, any action in relation to the obtaining or execution of this contract award procedure or showing or forbearing to show favour or disfavour to any person in relation to this contract award procedure or any other contract award procedure with LEO Carlow, or
2. if like acts have been done by any other person employed by the candidate or acting on its behalf (whether with or without the knowledge of the candidate).

# APPENDIX 1: Qualification Questionnaire

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| --- | --- | --- | --- | --- |
| **REF** | **PASS/FAIL CRITERIA** | **PASS REQUIREMENT** | | |
| **A1** | **Candidate Summary** | Candidates must complete this section. If the candidate is a grouping, then a separate questionnaire must be completed for each group member. | | |
| **A2** | **Tax Compliance** | **Note**: Candidates must furnish an up to date tax clearance certificate or alternatively complete the Self-Declaration Form (A3) providing information regarding their tax compliance. This applies to all group members. Refer to individual rules regarding members of a grouping. | | |
| **A4** | **Declarations** | Candidate must complete, sign and date these declarations. In relation to the Declaration of Bona Fides non-compliant candidates under any of the headings will be automatically disqualified. | | |
| **REF** | **WEIGHTED CRITERIA** | **MAX POINTS AVAILABLE** | **Assessment Lots 1 – 6**  **Mentoring** | **MIN POINTS REQUIRED** |
| **B1a** | **Previous Contracts** | 4,500 | Candidates should refer to instances within the last three years which demonstrate that they have successfully delivered mentoring services of a comparable nature and scale on two (2) occasions. The contracts referenced for consideration should provide comprehensive information to enable LEO Carlow to determine their comparability to the requirements of this contract. **Complete Section B1a.** | 6,000 |
| **B1b** | **Qualifications and Previous Experience** | 4,500 | Candidates should set out their relevant qualifications or FETAC equivalent scoring body for competencies required in the Lots applied for. Distinguish between Lots (link to ranked competencies within Lots) / competencies in your submission. **Complete Section B1b.** |
| Previous experience of mentoring small business should be demonstrated by a **comprehensive CV.** |
| **B1c** | **Mentoring Competencies** | 500 | Candidates should indicate their competencies within each Lot, and rank them from 1 (greatest expertise) to ten (if applicable) within each Lot. **Complete Section B1c** |  |
| **B1d** | **Availability** | 500 | Availability. **Complete Section B1d.** |  |
| **TOTAL** | | **10,000** | N/A | **6,000** |

**SECTION A – PASS/FAIL CRITERIA**

|  |  |
| --- | --- |
| **A1. CANDIDATE SUMMARY**  **Weighting:** Pass/Fail only  **Pass requirement:** Candidates must complete this section. | |
| **Organisation / Lead Name** |  |
| **Contact Name** |  |
| **Position** |  |
| **Address** |  |
| **Telephone Office** |  |
| **Telephone Mobile** |  |
| **Email** |  |
| **Date of establishment, if applicable** |  |
| **Legal Status, if any**  *(Company (Ltd.), Partnership, Sole Trader, etc.)* |  |

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| --- | --- | --- | --- | --- |
| **SUB-CONTRACTORS/GROUP MEMBERS**  If the Candidate wishes to rely on the standing of other parties including sub-contractors full details must be provided. | | | | |
| **Is the Candidate a group of economic operators?**  **Yes ❑ No ❑**  *If Yes, please provide the following information:* | | | | |
| **Please enclose an organisational chart with the proposed hierarchical structure of the grouping** | | ***Confirm if attached***  **Yes ❑ No ❑** | | |
| **Please describe the commercial and legal relationship between the members** | |  | | |
| **If your answer is “Yes”, please provide the following information:** | **Name** | | **Service to be delivered** | **Confirm Separate Questionnaire enclosed?** |
| **Member #1** |  | |  |  |
| **Member #2** |  | |  |  |
| **Member #3** |  | |  |  |

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| **A2 TAX CLEARANCE CERTIFICATE DECLARED BY SELF-DECLARATION** |
| **Weighting:** Pass/Fail only  **Pass requirement:** Candidates must complete the self-declaration (A3) providing information regarding their tax compliance. This applies to all group members. |

|  |  |  |
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| **A3 - Self Declaration of Financial and Economic Capacity** | | |
| **Tax Clearance** | **Please Confirm Yes/No** | |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | (A) I confirm and declare having a current and valid Tax Clearance Certificate in place and our tax affairs are in order. | | | **Yes** | **No** | |  |  | | Do you grant the LEO Carlow permission to verify your tax cleared position online via Revenue.ie? | | |  |  | | **Information required using new tax clearance certificate status adopted in 2016** | | | | | | Applicant Name |  | | | | | Applicant PPSN/Tax Reference Number |  | | | | | Access Number |  | | | | | Or (B) I confirm that I currently hold a valid tax clearance certificate | | Registration Number |  | | | Certificate Number |  | | | Or (C) I confirm that I currently have applied for a Tax Clearance Certificate that will be made available on request | | | **Yes** | **No** | |  |  | | | |
| **Turnover** | | |
| **I confirm that we have the requisite turnover to be considered for the framework.**   |  |  |  |  | | --- | --- | --- | --- | | **Year** | **Year 2015** | **Year 2014** | **Year 2013** | | **Turnover** |  |  |  | | | |
| **I confirm that I will provide evidence of turnover when requested.**  **NOTE #4**: In the case of sole traders or partnerships this condition may be satisfied by a letter of confirmation from the principal or senior partner. | | **Yes ❑**  **No ❑** |

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| **Insurances** | | |
| 1. **I confirm that we have the following insurances in place**  |  |  |  |  | | --- | --- | --- | --- | | **Insurance Type** | **Level in Place** | **Details of Any Excess** | **Expiry Date** | | **Employers Liability** |  |  |  | | **Public Liability** |  |  |  | | **Professional Indemnity** |  |  |  | | | |
| **AND** | | |
| **I confirm that if successful, where the levels required under the contract are higher than those currently in our possession, I will be in a position to put the required forms and levels of insurances required in place.** | | **Yes ❑**  **No ❑** |
| **AND** | | |
| **I confirm that I will provide the following promptly on request at any time prior to the award decision being made:**   * evidence of insurances in place  **or** * letter from Insurance Broker confirming that the required levels could be put in place if successful | | **Yes ❑**  **No ❑** |
| **Signed:** |  | |
| **Position:** |  | |
| **Dated:** |  | |

**A4. DECLARATION OF BONA FIDES (ARTICLE 57 OF Directive 2014/24/EU**

**Weighting:** Pass/Fail only

**Pass requirement:** Candidates must complete, sign and date this Declaration. LEO Carlow reserves the right at its discretion to exclude a non-compliant candidate under each heading. This must be completed by each group member.

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| **Mandatory exclusion**  Economic Operators will be excluded from the procurement process if, within the past five years, there is evidence of a conviction relating to a specific criminal offence listed below (see 1.1) or if they have been the subject of a binding legal decision which found a breach of legal obligations to pay tax or social security contributions (see 1.2) (except where this is disproportionate e.g. where only minor amounts are involved). | | | |
|  | Has the Economic Operator or a member of their proposed consortium, (if applicable), Director, or Partner or any other person who has powers of representation, decision or control, been convicted of any of the following offences? | **YES** | **NO** |
| Please indicate your answer by marking ‘X’ in the relevant box | |
| 1.1.a | participation in a criminal organisation, as defined in Article 2 of Council Framework decision 2008/841/JHA; |  |  |
| 1.1.b | corruption, as defined in Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of Member States of the European Union and Article 2(1) of Council Framework Decision 2003/568/JHA as well as corruption as defined in Irish Law or the jurisdiction in which the Economic Operator is established; |  |  |
| 1.1.c | fraud within the meaning of Article 1 of the Convention on the protection of the European Communities’ financial interests; |  |  |
| 1.1.d | the subject of a conviction for terrorist offences or offences linked to terrorist activities or for inciting or aiding or abetting or attempting to commit an offence; |  |  |
| 1.1.e | the subject of a conviction for money laundering or terrorist financing; |  |  |
| 1.1.f | the subject of a conviction of child labour and other forms of trafficking in human beings; |  |  |
| 1.2 | Non-payment of taxes or social security obligations  Has it been established by a judicial or administrative decision having final and binding effect in accordance with Irish law or the legal provisions of the country in which the Economic Operator is established (if outside Ireland), that the Economic Operator is in breach of obligations related to the payment of tax and social security contributions?  Note: If the response to 1.2 above is in the affirmative, please provide further information on the decision and the amounts involved |  |  |

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| --- | --- | --- | --- | --- | --- |
| **Discretionary exclusion**  **An Economic Operator who answers ‘Yes’ in any of the situations set out in paragraphs 2.1.a to 2.1.i will be excluded.** | | | | | |
| **2.1 Please indicate if any of the following situations have applied, within the past three years, or currently apply, to your organisation.**  **The Economic Operator:** | | **YES** | | **NO** | |
| **Please indicate your answer by marking ‘X’ in the relevant box** | | | |
| 2.1.a | has not, in the performance of all public contracts, complied with applicable obligations in the field of environmental, social and labour law that apply at the place where the works are carried out or the services provided that have been established by EU law, national law, collective agreements or by international, environmental, social and labour law listed in Annex X of Directive 2014/24/EU; |  | |  | |
| 2.1.b | is bankrupt or the subject of insolvency or winding-up proceedings, its assets are being administered by a liquidator or by the court, or has entered into an arrangement with creditors, suspended its business activities or is in any analogous situation arising from a similar procedure under national laws and regulations; |  | |  | |
| 2.1.c | is guilty of grave professional misconduct which renders its integrity questionable; |  | |  | |
| 2.1.d | has entered into agreements with other economic operators aimed at distorting competition; |  | |  | |
| 2.1.e | has a conflict of interest within the meaning of Article 24 of 2014/24/EU that cannot be effectively remedied by other, less intrusive, measures; |  | |  | |
| 2.1.f | confirms that it has had prior involvement in the preparation of the procurement procedure which has resulted in a distortion of competition, as referred to in Article 41 of 2014/24/EU, that cannot be remedied by other, less intrusive, measures; |  | |  | |
| 2.1.g | has shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions. |  | |  | |
| 2.1.h | * is guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria; or * has withheld such information or is not able to submit supporting documents required under Article 59 of Directive 2014/24/EU; or |  | |  | |
| 2.1.i | has undertaken to:   * unduly influence the decision-making process of the contracting entity, or * obtain confidential information that may confer upon the Tenderer undue advantages in the procurement procedure; or * negligently provide misleading information that may have a material influence on decisions concerning exclusion, selection or award. |  | |  | |
| **DECLARATION RE STATUTORY OBLIGATIONS** | | | | | |
| We confirm that we are fully compliant with the following legislation or equivalent: | | | **YES** | | **NO** |
|  | Employment Equality Acts 1998-2011 | |  | |  |
|  | Equal Status Acts 2000-2011 | |  | |  |
|  | National Minimum Wage Act 2000 as amended | |  | |  |
|  | Organisation of Working Time Act 1997 as amended | |  | |  |
|  | Safety, Health and Welfare at Work Act 2005 and Safety, Health and Welfare at Work (General Application) Regulations 2007 | |  | |  |
|  | Disability Act 2005 | |  | |  |
| AND | | | | | |
| We have procedures in place to ensure that our subcontractors, if any are used for this contract, apply the same standards. | | |  | |  |

I certify that the information provided in this declaration is accurate and complete to the best of my knowledge and belief. I understand that the provision of inaccurate or misleading information in this declaration will lead to my organisation being excluded from participation in this and future tenders.

This declaration is made for the benefit of the contracting entity.

|  |  |
| --- | --- |
| Name of Economic Operator |  |
| Authorised Signatory |  |
| Name in print or block capitals |  |
| Rank/Position |  |
| Date |  |

**NOTE: The term Economic Operator covers equally the concepts of Contractor, Supplier and Service Provider whether as Candidate, Tenderer or Participant under an award procedure in accordance with the relevant Public Procurement Directive.**

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| **A4.2 DECLARATION ON CONFLICT OF INTEREST**  **Weighting:** Pass/Fail only  **Pass requirement:** Candidates must complete, sign and date this Declaration | | | | |
| Candidates must disclose below any potential conflicts of interest or potential perceived conflicts of interest which they might have   1. with any aspect of this competitive process, or the Candidates' Application; or 2. with regard to any other aspect of the proposed contract or any ongoing activities of the LEO Carlow.   Accordingly, each Candidate must, in particular, disclose if its management, or any of its proposed personnel, their families or their associates have (or have had) any other interest in or involvement in relation to the proposed contract or any ongoing projects of the Contracting Authority.  Yes [ ] No [ ]  If yes please describe: | | | | |
| **Signed:** |  | **Position:** |  |
| **Dated:** |  | | |

**SECTION B - WEIGHTED CRITERIA**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **B1a PREVIOUS CONTRACTS**  **Weighting: 45% (Maximum 4,500 points)**  **Minimum requirement to remain eligible in the competition**: Applicants should outline their relevant experience of providing **Mentoring services** to comparable service provision projects particularly in an enterprise development environment completed in the past three years using the template below. Please provide a separate list detailing experience in the case of each lot that is applied for required. | | | | | | | | | | | | | | | |
| **CONTRACT #1** | | | | **Lots 1 – 6 Mentoring Services – please tick lot to which previous project refers** | | | | | | | | | | | |
| **Lot 1** |  | **Lot 2** |  | | **Lot 3** |  | **Lot 4** |  | | | **Lot 5** |  | | **Lot 6** |  |
| **Title of lot** | | | | | | |  | | | | | | | | |
| Start Date - End Date | | | |  | | | | | | | | | | | |
| Client Name & address  The client name refers to other organisations comparable to LEO, Fáilte Ireland, etc. and not the individual mentoring clients. | | | |  | | | | | | | | | | | |
| Client contact person: | | | |  | | | | | | Phone no.: | | |  | | |
| Details of Mentoring Services provided  (set out sector, development stage of client, link to specific Lot competency) | | | |  | | | | | | | | | | | |
| Did the contract involve the following aspects, if so please describe. | | | | **Element involved** | | | | | **Provide brief details** | | | | | | |
| Small business start-ups | | | | |  | | | | | | |
| Seeking investment/funding/sponsorship | | | | |  | | | | | | |
| Frequency of supply/service | | | |  | | | | | | | | | | | |
| Approx. Annual Value € | | | |  | | | | | | | | | | | |
| Please indicate the extent of which this project is comparable with this contract lot | | | |  | | | | | | | | | | | |

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| **B1b QUALIFICATIONS**  **Weighting: 45% (Maximum 4,500 points)**  **Minimum requirement to remain eligible in the competition.**  All Candidates must complete this section. |

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| --- | --- | --- | --- |
| **Academic Qualifications** | **Award (e.g. Diploma, Degree, Masters, MBA etc.). Please include QQI Level (www.qqi.ie)** | **Date Awarded** | **Relevant Lot(s)**  **(indicate competency within the Lot also)** |
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| **B1c Mentoring Competencies**  **Weighting: 5% (Maximum 500 points)**  **Minimum requirement to remain eligible in the competition**: Candidates should indicate their competencies within each Lot, and rank them from 1 (greatest expertise) to ten (if applicable) within each Lot. |

**Q**

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| --- | --- | --- | --- |
| **Lot 1 Finance** | | | |
| Basic book keeping |  | Accounting software |  |
| Sources of funding |  | Costing/Pricing |  |
| Taxation/VAT |  | **Other (please state)** |  |
| Revenue Services |  |  |  |

**U**

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| --- | --- | --- | --- |
| **Lot 2 Business** | | | |
| Idea Generation |  | LEAN for SME's |  |
| Business Planning |  | Product development |  |
| Business Management |  | Product design |  |
| Business Start Up Fundamentals |  | MFI Application Preparation |  |
| Business Expansion Processes |  | Tendering For Business |  |
| Resources Management |  | Franchising |  |
| Supply Chain Management |  | Merchandising |  |
| Quality Management |  | **Other (please state)** |  |

**A**

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| --- | --- | --- | --- |
| **Lot 3 Social Media and Digital Marketing** | | | |
| Facebook For Businesses |  | Digital Planning & Management |  |
| Twitter For Businesses |  | Digital Marketing Concepts |  |
| LinkedIn For Businesses |  | Google Analytics |  |
| Search Engine Optimisation |  | **Other (please state)** |  |

**LI**

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| --- | --- | --- | --- |
| **Lot 4 Sales and Marketing** | | | |
| Sales |  | Product design |  |
| Market research |  | Branding |  |
| Marketing |  | **Other (please state)** |  |
| Packaging |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Lot 5 HR** | | | |
| Interviewing & recruitment |  | Communication |  |
| Employment Law |  | Safety & Wellness |  |
| Employee Motivation |  | **Other (please state)** |  |
| Performance Management |  |  |  |

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| --- | --- | --- | --- |
| **Lot 6 International Trade** | | | |
| Growth strategy |  | Strategic Planning |  |
| Import/Export |  | **Other (please state)** |  |
|  |  |  |  |

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| **B1d AVAILABILITY**  **Weighting: 5% (Maximum 500 points)**  **Minimum requirement to remain eligible in the competition:** Candidates must complete this section. | |
| The Candidate confirms that: | |
| 1. I/We will respond in writing within a reasonable period (48 hours) to correspondence from LEO Carlow. |  |
| 1. **I**/We will make initial contact with a client within a reasonable period (72 hours) once allocated by LEO Carlow. |  |
| 1. I/We will give email notification of unavailability to LEO Carlow – i.e. holidays, other work commitments etc. |  |
| **Optional Voluntary Educational Support** | |
| Please indicate your willingness to partake in a voluntary education panel for the LEO Carlow Schools Enterprise Programme i.e. activities include in-schools talks, trade fair, judging competitions/events, other educational activities.  *Please note: This is for information purposes only, and will not form part of the assessment.* | **Yes ❑**  **No ❑** |

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| --- | --- | --- | --- |
| **Signed:** |  | **Position:** |  |
| **Dated:** |  | | |

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| **B2 SECTOR SPECIFIC EXPERTISE**  Candidates must complete this section. This section will not be scored – for information purposes only |

|  |  |  |  |
| --- | --- | --- | --- |
| **Sector** |  | **Sector** |  |
| Business Services |  | Furniture/Light Consumer Goods Manufacture |  |
| Clothing & Fashion |  | Loan Management & Review |  |
| Communication, Media & Entertainment Services |  | Manufacturing (Other) |  |
| Craft/Design/Fashion |  | Online Trading / E-commerce |  |
| Consumer Services |  | Packaging Manufacturing |  |
| Digital Sector |  | Pharmaceutical |  |
| Education |  | Property Development/Management |  |
| Electronics |  | Retail / Hospitality |  |
| Engineering |  | Social Media |  |
| Environment & Green Business |  | Software/IT |  |
| Financial Services |  | Tourism |  |
| Food |  | Innovation and product concept design |  |
| **Other (not mentioned above but relevant to Lot(s) applied for)** | | | |
|  |  |  |  |
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| --- |
| **B3 INTEREST IN OTHER ACTIVITIES**  Candidates must complete this section. Please tick to indicate interest. This section will not be scored – for information purposes only |

|  |  |
| --- | --- |
| **Activity** |  |
| General business advice clinics / Business Needs Analysis (Refer to Section 5.2.1) |  |
| Other Services (refer to Section 5.2.2) |  |
| Other Sectoral Projects incl. Online Trading Vouchers Scheme (refer to Section 5.2.3) |  |

# APPENDIX 2: Candidates’ Statement

TO: **Carlow County Council**

RE:

Having examined your Request for Tenders (RFT) including the Instructions to Candidates, Qualification, Requirements and Specifications, Terms and Conditions of the Services Contract, we hereby agree and declare the following:

1. I/We understand the nature and extent of the Services required to be delivered as described in the Application.

2. I/We accept, that if we are admitted to the Panel, all of the Terms and Conditions of the Services Contract and the Confidentiality Agreement and agree if awarded any contract to execute the Services Contract.

3. I/We accept all the Qualification Criteria as set out in Appendix 1 of the Application and, if requested by LEO Carlow, shall immediately furnish such evidence as may demonstrate our economic and financial capacity in accordance with the said paragraph Section A3.

4. I/We agree to provide LEO Carlow with the Services in accordance with the Application.

5. I/We accept the prices set out in Section 5.1 of the Application.

6. I/We shall, if awarded any contract under the Application, have in place on the Effective Date of the Services Contract all insurances (if any) as required by paragraph 2.2 of the Application.

SIGNED Company

(Authorised Signatory)

Print name

Address

Date

***Label for use when submitting proposal***

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **TENDER - TENDER - TENDER**    **Tender: “Panel of Mentors,**  **Local Enterprise Office, Carlow",**  **Carlow County Council**  **Athy Road**  **Carlow**  **Closing Date and Time: 20th January 2017 @ 12 noon**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Lot No.** | **Tick if Applied for** | **Lot No.** | **Tick if Applied for** | **Lot No.** | **Tick if Applied for** | | Lot 1 |  | Lot 3 |  | Lot 5 |  | | Lot 2 |  | Lot 4 |  | Lot 6 |  | |

# 

# APPENDIX 3: Services Contract and Confidentiality Agreement

*It will be a requirement of this tender that the successful tenderer will be required to sign Carlow County Council's Services Contract and Confidentiality Agreement*

*Candidates will need to sign both in order to be admitted to the Panel*