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PANEL APPLICATION DOCUMENT (LOT 2)

**Please read this document in conjunction with the
Invitation for Panel Membership document**

Establishment of Panels for:	Lot 2: Coaching Services for Pobal clients participating in the ESF+ Achieve Together Coaching and Mentoring Programme		
Contracting Authority:	Pobal		
Reference	0282	eTenders Resource ID:	3888154
Closing Date / Time for receipt of Completed Applications <u>for initial work:</u>	Tuesday 6 th August 2024 @12 noon (local time)		
Submissions via:	eTenders postbox only – See Invitation for Panel Membership document, Section 5.3 for details. <u>Please upload as ZIP File.</u>		
Organisation Name:			
Contact Name:			
Contact Email:			



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Instructions for Completion

This document **MUST** be used for the submission of Applications for Panel Membership.

Applicants should ensure they have read the Invitation for Panel Membership document before they attempt to complete this Panel Application Document.

If you consider that the Panel Application Document is missing any sections which would prevent you from preparing a comprehensive response, please contact the Contracting Authority as soon as possible.

Where there is a discrepancy between the contents / instructions in this document and the Invitation for Panel Membership document, the Invitation for Panel Membership document will take precedence.

Applicants must follow the instructions contained in this document in relation to attachments, format for submission, etc.

Where Applicants are relying on other parties to meet the selection criteria, those parties must be available to deliver elements of the contract.



Appendix A:

The table below summaries the requirements for information for those interested in applying for membership of the panel.

Ref	Pass/Fail Criteria	Pass Requirement	
A1	Applicant Summary	Applicants must complete this section. If the Applicant is a grouping, then a separate questionnaire must be completed for each group member.	
A2	Tax Compliance	Applicants must provide information regarding their tax compliance. Please note rules on tax compliance. Applications must complete the self-declaration (A3-A5)	
A3	Financial Standing	Confirmation that the applicant party is financially sound and has the financial capacity to pay its debts as they fall due.	
A4	Insurance	Applicants must provide information regarding the insurances in place and are asked to note that the levels required must be in place for the firm(s) being awarded this contract. Applications must complete the self-declaration (A3-A5)	
A5	Declarations	Applicants must complete, sign and date this Declaration. Non-compliant Applicants under any of the headings and/or Declarations will be automatically disqualified.	
Ref	Weighted Criteria	Max points available	Min points required
B1	Previous Contracts	5,000	2,500
B2	Relevant qualifications necessary for delivery of Coaching Services	3,000	1,500
B3	Understanding of Coaching Services Required	2,000	1,000
TOTAL		10,000	n/a



Each of the selection criteria in Section B (i.e., B1, B2 and B3) will be scored using the following scoring system:

Scope	Meaning	Interpretation
90% – 100%	Outstanding	An outstanding response demonstrating extensive understanding offering full assurance to client – fully supported with no reservations.
80% – 89%	Excellent	An excellent response demonstrating excellent understanding offering assurance to client – fully supported.
70% – 79%	Very good	A very good response demonstrating very good understanding offering assurance to client – strongly supported.
60% – 69%	Good	A good response demonstrating suitable understanding offering assurance to client – well supported.
50% – 59%	Acceptable	An acceptable response demonstrating a minimum understanding offering assurance to client – satisfactorily supported.
Less than 50%	Unacceptable	A poor response demonstrating limited to no understanding with insufficient or no details and a risk of non-delivery.

Applicants should note that if they do not achieve at least the minimum required mark (50% or more) or meet any other specified minimum requirements for any criterion (B1, B2 or B3) they shall be eliminated from the Competition.

Percentage (%) scores will be applied to the available marks for each criterion to generate final marks for each Applicant.

NOTE: As this competition relates to a Panel, those who fail in their application will be notified of the reasons and are fully entitled to re-apply having addressed the improvements needed.



SECTION A - PASS/FAIL CRITERIA

A1. APPLICANT SUMMARY

Weighting: Pass/Fail only

Pass requirement: Applicants must complete this section.

Applicant Company Name:				
Address:				
Eircode/Postcode:				
Contact Person:				
Position:				
Office Telephone:				
Email:				
Website:				
Date of Establishment, if applicable				
VAT Registration No:				
Legal Structure – Company (Ltd), Partnership, Sole Trader, any other				
Overview of Organisation including services, supplies offered, and markets served				
Please confirm if you are an SME (Small and Medium Enterprise) as defined in Commission Recommendation 2003/361/EC*	Yes		No	
*Definition as per 2003/361/EC The company of micro, small and medium-sized enterprises (SMEs) is made up of enterprises which employ fewer than 250 persons and which have an annual turnover not exceeding EUR50million, and/or an annual balance sheet total not exceeding EUR43million.				



A1b Relying on the Capacity of other Entities (see Section 4.7 above for instructions)

Applicants can rely on the capacity of other entities. If the Applicant wishes to rely on the capacity of other parties including sub-contractors to meet criteria and/or deliver elements of the contract, full details should be provided below.

Section A of the PQQ must be completed by those parties, and the Prime Applicant must confirm that if successful that those other parties are available to deliver the services when required and may be required to co-sign the formal Services contract.

Is the Applicant a Prime Applicant acting on behalf of a group of economic operators regardless of legal form of grouping?	Yes		No	
--	-----	--	----	--

If yes, please provide the information below on the other parties in A1b and provide details below on the type of grouping e.g. consortium, joint venture, subcontracting etc.

Is the Applicant a party upon whom the Prime Applicant is relying upon as part of their application?	Yes		No	
--	-----	--	----	--

If yes please furnish a completed Section A of this PQQ to the Prime Applicant for submission

A1c Reliance on other Entities - Details and Contributions:

Name	Service to be delivered and/or criterion where Applicant is relying on their resources	Section A including all sub-sections completed			
		Y		N	
		Y		N	
		Y		N	

Confirmation that relevant information is provided for all entities upon whose capacity the Applicant is relying upon and their agreement to participate has been secured.

Y		N	
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Self-Declaration Form (A2-A4)

A2 Tax Compliance

Option 1: I confirm and declare being tax compliant. The Contracting Authority can verify your tax clearance status through Revenue's online facility at http://www.revenue.ie/en/online/tax-clearance.html To this end, please confirm:	Yes	
	No	

Applicant Name:	
Tax Reference Number (PPSN):	
Access Number:	

Option 2: I confirm that I hold a current valid Tax Clearance Certificate (generally relates to Non-Residents) To this end, please confirm:	Yes	
	No	

Registration Number:	
Certificate Number:	

Option 3: I confirm that I have applied for Tax Clearance status or a Tax Clearance Certificate which will be made available on request	Yes	
	No	

A3 Financial Capacity

I confirm that the applicant party is financially sound and has the financial capacity to pay its debts as they fall due.	Yes	
	No	

A4 Insurances

Successful Tenderer(s) shall be required to hold for the term of the Contract the insurances in the below table:

I confirm, that if awarded a Contract under this Competition,

- (i) I will, from the Effective Date of the Contract (as defined in the Contract) hold the types and levels of insurance as specified in the RFT.
- (ii) the territorial limits and jurisdiction of the insurance policies will include the Republic of Ireland and
- (iii) I am not aware of any exclusions, restrictions, conditions or warranties or, in the case of policies with an aggregate limit of indemnity, any outstanding claims, which could have a material adverse impact on the level of coverage specified above.

A formal confirmation from the Tenderer's insurance company or broker to this effect will be requested from the successful Tenderer(s) prior to the award of (and shall be a condition of) any Contract.

The successful Tenderer will, during the term of the Contract, be required to:

- a) immediately advise the Contracting Authority of any material change to its insured status;
- b) produce proof of current premiums paid upon request;



produce valid certificates of insurance upon request.		
Insurance Type	Level in place	Comments (if any)
Employer Liability (not required for sole trader)	€12.7 million	
Public Liability	€6.5 million	
Professional Indemnity	€500,000	
I confirm that I will provide the following promptly on request at any time: Evidence of insurances in place or Letter from Insurance Broker confirming that the required levels could be put in place if successful	Yes	
	No	
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 promptly.	Yes	
	No	
Please note that the Contracting Authority will seek to verify self-declarations regarding financial capacity prior to next stage of the competition.		
Authorised Signatory:		
Name in Block Capitals:		
Position		



A5 DECLARATIONS

Declaration of Bona Fides (Under Public Sector Directive 2014/24/EU - Article 57)

Weighting: Pass/Fail

Pass requirement: Applicants must complete, sign and date this Declaration. The Contracting Authority reserves the right at its discretion to exclude a non-compliant applicant under each heading. This must be completed by each group member.

Economic Operators will be excluded from the procurement process if, within the past five (5) 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).

1.1	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	
1.1a	participation in a criminal organisation, as defined in Article 2 of Council Framework decision 2008/841/JHA;		
1.1b	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;		
1.1c	fraud within the meaning of Article 1 of the Convention on the protection of the European Communities' financial interests;		
1.1d	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;		
1.1e	the subject of a conviction for money laundering or terrorist financing;		
1.1f	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? If the response to 1.2 above is in the affirmative, please provide further information on the decision and the amounts involved.		



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 (3) years, or currently apply, to your organisation. The Economic Operator:	Yes	No
		Please indicate your answer by marking 'X' in the relevant box	
2.1a	has, in the performance of any public contract, failed to comply with applicable obligations in the field of environmental, social and labour law applying at the place where the works were carried out or the services provided, as 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;		
2.1b	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;		
2.1c	is guilty of grave professional misconduct which renders its integrity questionable;		
2.1d	has entered into agreements with other Economic Operators aimed at distorting competition;		
2.1e	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;		
2.1f	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;		
2.1g	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.		
2.1h	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		
2.1i	has undertaken to: - unduly influence the decision-making process of the contracting entity, or - obtain confidential information that may confer upon the applicant 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 legislation in our country of establishment / operation:		Yes	No
(i)	Employment Equality Acts 1998-2011		
(ii)	Equal Status Acts 2000-2011		
(iii)	National Minimum Wage Act 2000 as amended		
(iv)	Organisation of Working Time Act 1997 as amended		
(v)	Safety, Health and Welfare at Work Act 2005 and Safety, Health and Welfare at Work (General Application) Regulations 2007		
(vi)	Disability Act 2005		
(vii)	General Data Protection Regulation 2016/679		
(viii)	We have procedures in place to ensure that our subcontractors, if any are used for this contract, apply the same standards.		
Article 5K Declaration			
EU Regulation 2022/576 on restrictive measures in the Context of Russian Actions in the Ukraine			
A.	In the light of Russian actions in the Ukraine, the European Council adopted a new regulation – EU Regulation 2022/576 , aimed at restricting participation in economic activity by economic operators from the Russian Federation. Article 5K of the Regulation prohibits the award or continuation of contracts falling within the scope of the Public Procurement Directives to persons or undertakings related to the Russian Federation. To comply with EU Regulation 2022/576, the Contracting Authority is seeking a declaration from economic operators to this effect.		
B.	I declare that none of the exclusions specified in EU Regulation 2022/576 apply to any party associated with this application.	Yes	No
ESF+ Horizontal and Human Rights Principle Declaration			
We confirm that we will take steps to.		Yes	No



- | | | |
|--|--|--|
| <ul style="list-style-type: none">• Ensure respect for fundamental rights and the EU Charter of Fundamental Rights• Ensure respect for gender equality, including gender mainstreaming and inclusion of a gender perspective; and• Prevent discrimination on the grounds of gender, racial or ethnic origin, disability, religion or belief, age, and sexual orientation, including attention to accessibility for persons with disabilities | | |
|--|--|--|

This Declaration is made for the benefit of the Contracting Authority
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 Applications and I am signing on behalf of:

Name of Economic Operator:	
Authorised Signatory:	
Name in Block Capitals:	
Position:	



SECTION B - WEIGHTED CRITERIA

B1 Previous Experience – Lot 2 Business Coaching

Weighting: 50% (Maximum 5000 points)

Minimum requirement to remain eligible in the competition: 2,500 points

ALL THE CONTRACT REFERENCES PROVIDED WILL BE ASSESSED TOGETHER IN THE ROUND, RATHER THAN INDIVIDUALLY.

Applicants must demonstrate to the satisfaction of the Contracting Authority that they have the experience necessary to supply Business Coaching services for Lot 2 if their Application is successful. In order to demonstrate that the Applicant meets this criterion please provide the following:

Details of three (3) reference contracts which demonstrate, to the satisfaction of the Contracting Authority, the Applicant's experience in successfully delivering Business Coaching services demonstrating the specific requirements set out below. Each reference contract must relate to services delivered **within the 60 months prior to the deadline for submission of Applications**. Reference contracts outside this timeframe will not be considered.

At least one of the three (3) reference contracts must¹:

- I. Relate to the provision of a coaching service in the nonprofit sector or allied for profit sector.
- II. Demonstrate knowledge of Social Innovation/ Social Entrepreneurship.
- III. Demonstrate how the Applicant implemented organisational health checks and their outcomes.
- IV. Demonstrate how the Applicant implemented a training needs assessment and its outcome.
- V. Evidence Strategic Planning and Management.

Applicants must use the table format below for their answers and must respond to each element of the table.

Applicants must provide sufficient information to enable the Contracting Authority to evaluate whether all of the requirements stated above have been met and whether the services have been successfully delivered. Name of firms / confidential data is not required, but the level of information provided should be such that it will enable the Contracting Authority to assess the suitability of the Applicants.

Applicant's response is limited to two (2) A4 pages per reference contract using the template below.

¹ Note to Applicants: (i), (ii) (iii) (iv) and (v) can be demonstrated by different reference contracts, but each of them must be demonstrated.



Lot 2 Business Coaching Service Contract #1		
Title of Contract		
Recipient of services		
Contract Start Date		
Contract Finish Date (if applicable)		
Contract Value excluding VAT		
Contract reference	Name	
	Address	
	Telephone	
	Email	
Detailed description of the services provided in no more than two (2) x A4 pages demonstrating the impact of the project. Taking account of the features of the contract, please provide information demonstrating comparability with the contract being awarded under this procurement: Business Coaching Services. Details should include the precise services supplied and how the contract was managed including the approach to the resource planning that delivered the services. If any sub-contractors were used, explain what they did and the value (in €) of their work. If you carried out the service with others (e.g., as part of a joint venture) explain the nature of your role, the work you did and the value (in €) of your role		

Applicant's Response

Please use this free text page(s) (i.e. **do not** type in the box) for your response.



Lot 2 Business Coaching Service Contract #2		
Title of Contract		
Recipient of services		
Contract Start Date		
Contract Finish Date (if applicable)		
Contract Value excluding VAT		
Contract reference	Name	
	Address	
	Telephone	
	Email	
Detailed description of the services provided in no more than two (2) x A4 pages demonstrating the impact of the project. Taking account of the features of the contract, please provide information demonstrating comparability with the contract being awarded under this procurement: Business Coaching Services. Details should include the precise services supplied and how the contract was managed including the approach to the resource planning that delivered the services. If any sub-contractors were used, explain what they did and the value (in €) of their work. If you carried out the service with others (e.g., as part of a joint venture) explain the nature of your role, the work you did and the value (in €) of your role		

Applicant's Response

Please use this free text page(s) (i.e. **do not** type in the box) for your response.



Lot 2 Business Coaching Service Contract #3		
Title of Contract		
Recipient of services		
Contract Start Date		
Contract Finish Date (if applicable)		
Contract Value excluding VAT		
Contract reference	Name	
	Address	
	Telephone	
	Email	
Detailed description of the services provided in no more than two (2) x A4 pages demonstrating the impact of the project. Taking account of the features of the contract, please provide information demonstrating comparability with the contract being awarded under this procurement: Business Coaching Services. Details should include the precise services supplied and how the contract was managed including the approach to the resource planning that delivered the services. If any sub-contractors were used, explain what they did and the value (in €) of their work. If you carried out the service with others (e.g., as part of a joint venture) explain the nature of your role, the work you did and the value (in €) of your role		

Applicant's Response

Please use this free text page(s) (i.e. **do not** type in the box) for your response.



B2 Relevant qualifications necessary for delivery of Business Coaching Services

Weighting: 30% (Maximum 3000 points)

Minimum requirement to remain eligible in the competition: 1,500 points

Applicants must submit CVs using the format below for each identified member clearly demonstrating their experience, skills and expertise to deliver Business Coaches services.

Resources proposed should demonstrate in their CV template below the following Business Coaching services requirement set out in Section 2.4 of the Invitation document.

Applicant's response is limited to two (2) A4 pages for the below CV template.

CV Template

Applicants should copy the format below and complete for each team member proposed.

CV for Team Member(s) Lot 2 Buisness Coaching	
Name	
Relevant qualifications: relevant professional qualifications (institution(s), award(s) conferred, and date(s) obtained) – please refer to Section 2.4.1 of the Invitation document.	
Detail experience, below, relevant to the Business Coaching role , with examples of specific projects where the relevant experience has been gained and must demonstrate having worked in a leadership capacity in the nonprofit or allied for profit sector.	
Ensure the relevance of the experience is clearly highlighted. If the details of projects are confidential, ensure sufficient information is included to demonstrate their relevance.	

Applicant's Response

Please use this free text page(s)



B3 Understanding of Business Coaching Services Required

Weighting: 20% (Maximum 2000 points)

Minimum requirement to remain eligible in the competition: 1,000 points

Applicants are required to describe their understanding of the Business Coaching Requirements, as set out in Section 2.4 of the Invitation document. Applicants must provide a comprehensive response detailing (but not limited) to the following:

- How Applicants expertise will enable organisations in the nonprofit or allied for profit sector to strengthen their capacity to grow in a sustainable manner thereby developing the organisations' ability to maximise social value and enhance the employment of social inclusion target groups within local communities. **(max one (1) A4 page)**
- The Applicants ability to rapidly build trust as a support driven professional within a social enterprise leadership and innovation context. Credible, empathetic, patient, inquisitive, analytical, challenging and questioning. Facilitating, personable and understanding, yet thorough and pragmatic. **(max two (2) A4 pages)**

Applicant's response is limited to **three (3) A4 pages**, as set out above.

Applicant's Response

Please use this free text page(s) (i.e. **do not** type in the box) for your response.