

**Invitation for Stock-taker Panel Membership**

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| **Establishment of a Panel for** | ***Provision of stock-takers*** |
| **Issue Date** | *28th October 2021* |
| **Initial Closing Date for Receipt of Applicants** | *14th November 2021* |
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# Disclaimer

This document issued herewith is for information only and does not constitute, and shall not be interpreted as, an offer for sale, prospectus, or the basis of a contract.

# 2: About the Stock-takers Panel

Kerry ETB is the lead statutory provider of education and training in Kerry providing education and training opportunities to over 13,000 learners annually. Currently, Kerry ETB employs c. 1,100 staff working in over 37 locations throughout the County.

Given its remit and broad geographical spread Kerry ETB utilises a significant level of Fixed Assets in carrying out its activities.  The individual locations are responsible for maintaining and safeguarding the Fixed Assets and maintaining a detailed Fixed Asset Register.  It is Kerry ETB Policy that a stocktake of the assets held in each location is undertaken every three years by an external party.

# 3: Scope of Services Required under the Panel

Kerry ETB is seeking to establish a panel of individuals capable of undertaking stock-takes on behalf of the organisation. The panel will be for 2 years initially and Kerry ETB will utilise this panel to conduct annual reviews of Fixed Assets in Kerry ETB Schools, Campuses and Centres.

Four Lots will be set up which will serve different geographical areas. Applicants can apply for one, more or all of the Lots.

If successful, applicants will be expected to undertake a stocktake to ensure:

* *all assets listed on the Fixed Asset Register are properly accounted for*
* *the information maintained on the Fixed Asset Register is sufficiently detailed*
* *any variances between the Fixed Asset Register and the Stocktake are identified*
* *a detailed Report is completed following the stocktake*

It is anticipated that the first engagements will be November, 2021.

## 4: Numbers Admitted to the Panel

There will be no restrictions to the number of applicants who can qualify for the panel.

## 5: Duration of the Panel

The duration of the panel will be 2 years, with an option to extend to maximum of 4 years subject to satisfactory annual review of performance and at the discretion of Kerry ETB.

## 6: Awarding Contracts under the Panel

In the case of this panel, contracts will be awarded as follows:

Kerry ETB will rank applicants on receipt of application forms on the following basis:

* The scores will be awarded using the award criteria listed in Section 15 below
* Positions on the panel will be placed in order of achieved score.
* The award of Contracts will rotate between framework members in a pre-determined order. That order will be determined based on the initial scoring of submissions and ranking the submissions from highest qualifying score to lowest qualifying score. The initial/ first contract will be awarded to the number one ranked supplier, the next contract will be awarded to the number two ranked supplier and so on. In the event that a supplier cannot carry out a contract, the contract will be offered to the next ranked supplier. When the final ranked supplier has accepted a contract, the subsequent contract will be offered to the number one ranked supplier and the contracts will be rotated as before.  Note there is no guarantee of sufficient contracts over the Framework Agreement period, so that all admitted suppliers will be offered a contract.
* Kerry ETB will use this panel as and when requirements arise. **However, there is no obligation upon Kerry ETB to make use of this panel.**

Applicants may apply for the following lots:

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| **Lot 1**  | Schools and Centres based in Listowel Municipal District |
| **Lot 2**  | Schools and Centres based in Tralee Municipal District |
| **Lot 3**  | Schools and Centres based in Killarney Municipal District |
| **Lot 4**  | Schools and Centres based in South & West Municipal District |



## 7: Hours & Range of Programme Delivery

**Hours:** Various, as and when required and will be dependent on facility size to be agreed before commencement of stock-take.

**Reporting to:** All stock-takers will report to the **Head of Finance, Kerry ETB.**

**Range of Work:** It is envisaged that 12 stocktakes will be conducted per year across the scheme.

**8: Personal Profile**

The successful applicant will:

* Be committed to providing work of a high standard.
* Have the ability to work on their own initiative
* Have excellent planning and organisational skills.
* Have excellent communication skills both written and verbal
* Display excellent attention to detail

It is desirable that applicants will:

* Have previous stocktaking experience
* Have sufficient IT skills – experience of word, excel

**9: Stock Take Locations**

The stock-takes will be undertaken in one of the 37 Kerry ETB Schools, Campuses, Centres, Programmes across Kerry ETB (see www.kerryetb.ie).

**10: Covid-19 Protocols**

All government guidelines in relation to Covid-19 (at the time of induction) will be followed.

### 11: Irish Language

Please note if you are a fluent Irish speaker. This is not a necessary requirement but some locations may be located in a Gaelcholáiste/Gaeltacht area so Irish language proficiency may be beneficial.

### 12: Pricing

Currently Kerry ETB offers a stock-taking rate of €200 per day (7 hour day). It is taxable and is inclusive of all ancillary expenses (e.g. travel) that may be incurred.

**The fee is fixed for the duration of the panel.**

**NOTE**: ALL SUCCESSFUL APPLICANTS WILL BE REQUIRED TO CONFIRM IN WRITING THEIR ACCEPTANCE OF THESE RATES AS MAXIMUM RATES FOR THE DURATION OF THE PANEL.

### 13: Invoicing & Payment

In providing the services it is expressly agreed that the Stock-taker is acting as an independent contractor and not as an employee. The stock-taker and Kerry ETB acknowledge that the work undertaken does not create a contract of employment, a partnership or a joint venture.

The stock-taker will be responsible for all income tax liabilities relating to the payment. It will be a condition of admittance to the Panel that successful applicant(s) must be tax compliant and this status must be maintained throughout the lifetime of the contract.

The stock-taker will charge Kerry ETB a flat fee of €200 for the services. The stock-taker will invoice when the services are complete and provide a timesheet verified by the facility manager. Payment will only be confirmed once all timesheets are verified by the Facility Manager, received and approved by the Head of Finance.

### 14: Review of Supplier Performance

Monitoring of performance will be an essential feature of work awarded under the Panel. Performance will be monitored over the term of any contract. Quality of service, adherence to the brief, completeness and quality of the report will be the main criteria for measuring performance. It is expected that the successful applicant(s) will take a proactive role with a view to making appropriate recommendations where necessary.

Poor performance will be identified and raised with individuals and may result in termination of a contract. Persistent poor performance may result in the applicant being removed from the Panel. This will not be done without dialogue between the parties involved.

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# 15: Eligibility Criteria for Admittance to the Panel

**Eligibility Criteria**

While all interested parties may apply to the panel, only those demonstrating that they have the required level of experience, skill and availability will have their application considered. In order to demonstrate eligibility, applicants are required to provide the following information:

* **Cover letter** outlining relevant experience, suitability and availability
* **Up-to-Date CV**
* **Referees:** Please give the names and addresses of two referees from whom Kerry ETB can request references on your behalf **prior** to inclusion on the panel. One should be a recent employer.  Both referees should have been in a position of responsibility within the employing organisation(s).  They must not be related to the applicant, or be known to the applicant only as a friend.

Applicants should note that Kerry ETB may contact any or all referees for verification purposes without prior notice being given to the tenderer.

* **Child Protection and Garda Vetting**

The selected applicants will be required to follow child protection procedure as specified by Kerry ETB and will also be required to undergo Garda Vetting if not already Garda vetted.

* **Tax compliance**

All applicants must be tax compliant and this will be verified by the Finance Department prior to any payment.

**Admittance to the Panel**

Only Applicants which meet the Eligibility criteria will be evaluated. Applicants should ensure that they have submitted sufficient relevant information to allow their applications to be assessed under each of the award criteria set out below.

Kerry ETB will score all applicants in the relevant. Applicants will be placed in order of achieved score. Scores will be awarded under the following headings:

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| **Criteria** | **Weighting** | **Maximum Score** | **Minimum Score Required** |
| 1. Relevant experience
 | 80% | 8000 | 4800 |
| 1. Relevant Skills
 | 10% | 1000 | 600 |
| 1. Availability
 | 10% | 1000 | 600 |

**NOTE 1: Applicants should note that they must achieve a minimum rating of 60% for each of the individual qualitative criteria (A) to (c) in order to avoid elimination from the competition.**

 **Qualitative criteria will be scored using the following baseline scoring system:**

***0 = No Response;***

***20% = Poor;***

***40% = Mediocre;***

***60% = Acceptable***

***70% = Good***

***80% = Very Good;***

***90% = Excellent***

***100% = Outstanding***

**Marks between the base lines outlined above can be awarded where responses so merit additional marks.**

## Freedom of Information Acts

Applicants are asked to consider if any of the information supplied by them in response to this request for applications should not be disclosed because of its sensitivity. If this is the case, applicants should specify the information that is sensitive and the reasons for its sensitivity. Kerry ETB cannot guarantee that any information provided by applicants, either in response to this Panel Application or in the course of any contract awarded as a result thereof, will not be released pursuant to Kerry ETB’s obligations under law, including the Freedom of Information Act 2014, EU and Irish Government Procurement Procedures or in response to questions, debates or other parliamentary procedures in or of the Oireachtas (the Irish Parliament). Kerry ETB accepts no liability whatsoever in respect of any information provided which is subsequently released or in respect of any consequential damage suffered as a result of such disclosure.

## Closing Date

Applicants may apply at any time for inclusion on the Panel. The Panel will be continually open for applications, however applicants are encouraged to apply within the initial timeline to ensure they are considered for the initial contracts to be awarded.

Those interested in being considered for the initial tranche of work must have submitted a response before **16:00 hours on 14th November 2021.**

Those who miss the deadline, or indeed fail in their initial application can apply at any time thereafter. Those applying after the initial deadline should email their submission to procurement@kerryetb.ie

## Notification of Results

All applicants will be informed of the outcome of their application following evaluation process. Potential outcomes can be:

1. Admittance to the Panel
2. Rejection from the Panel

# APPENDIX 1 – Response Document

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| **Name**  |  |
| **Address** |  |
| **Phone Number** |  |
| **Email** |  |
| **Irish Language Proficiency** |  |
| **Please tick which of the lots you would be available to work in****More than 1 can be ticked** | **Lot 1:** Locations based in Listowel Municipal District |  |
| **Lot 2:** Locations based in Tralee Municipal District |  |
| **Lot 3:** Locations based in Killarney Municipal District |  |
| **Lot 4:** Locations based in South & West Municipal District |  |
| **Details of Experience relevant to the role.****Please use Bullet Points** **300 words max** |  |
| **Details of any skills relevant to the role.****Please use Bullet Points** **300 words max** |  |
| **Availability: length of notice required in advance of completing a stocktake.** |  |
| **Other information considered relevant to this application****200 words max** |  |

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| **Selection Criteria Qualification****Please tick** | If successful I agree to be Garda Vetted |  |
| If successful I agree to comply with Kerry ETB Child Protection Policy |  |
| If successful I am aware of and agree to the method of payments that Kerry ETB use and agree to have applicable taxes deducted |  |
| **Confidentiality**If successful I agree to not discuss or disclose any information except in the proper course of my engagement.  This restriction shall continue to apply after termination of my engagement. |  |
| **Conflict of Interest**If successful I agree to disclose any conflict of interest which may disqualify me as an applicant or invalidate an award of contract, depending on when the conflict of interest comes to light. |  |

Having read and understood the Briefing Documents, I hereby offer to provide the services in accordance with the criteria outlined above.

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| Signed: |  |
| Name (in Capital Letters): |  |
| Address: |  |
| Telephone: |   |
| Email: |  |
| Date:  |  |