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 **Request for Quotations for the design & delivery of an Infographic of the Budget Process for the Houses of the Oireachtas**

**Tender Ref: 2014/1019**

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| Contract Reference: | **2014/1019** |
| Tender owner | Oireachtas Library & Research Service |
| Person(s) responsible for queries: | John McDonough, Oireachtas Library & Research Service |
| Email address(s):  | tenders@oireachtas.ie |
| Tender Issued | 25/06/2014 |
| Closing date for receipt of queries:  | 18/07/2014 – Queries must be submitted via the electronic post box available on [www.etenders.gov.ie](http://www.etenders.gov.ie) or e-mailed to tenders@oireachtas.ieSubject Bar must include the words ‘ Queries re: RfQ for Infographic Design |
| Closing date and time for receipt of tenders:  | 25/07/2014 **by 12.00 noon** |
| Electronic tender post-box being used and instruction attached | Tenders must be submitted via the electronic post box available on [www.etenders.gov.ie](http://www.etenders.gov.ie) Tenders submitted by fax or by post will not be accepted |
| Number of hard copies required | **N/A** |
| Soft copy (memory key, cd rom)  | **2 electronic copies of the RFQ in PDF format must be submitted. One copy should contain prices whilst the other copy should not include any prices – these should be clearly indicated** |
| Attachments | **N/A** |

1. **Introduction**

The Houses of the Oireachtas Service (“the Service”), acting for and on behalf of the Houses of the Oireachtas Commission (“the Contracting Authority”) wishes to engage a service provider to design and deliver an infographic of the budget process from the perspective of the Houses of the Oireachtas.

The Contracting Authority is responsible for the running of the Houses of the Oireachtas, or Irish Parliament, (Dáil Éireann, Seanad Éireann and Oireachtas Committees), and acts as governing body of the Service (further information is available at [www.oireachtas.ie](http://www.oireachtas.ie)).

Tenderers must read and treat this Request for Quotations (RFQ) document as a response document. Tenderers must give their responses by completing the questions as set out in the relevant response areas provided in section 6 and section 8. Section 6 includes information which must be provided before a tenderer will be considered eligible for evaluation under the award criteria. Section 8 includes all mandatory requirements and those questions which will be used to assess and score each tenderer’s response. **All response sections must be completed in full.**

1. **Background to Procurement**

The Oireachtas Library & Research Service (L&RS) is part of the Parliamentary Services Division in the Houses of the Oireachtas Service. The L&RS provides impartial information and research services to support the work of both Houses, individual Members and Committees in respect of their parliamentary duties.

The L&RS provides a wide range of research and information services for Members of the Houses of the Oireachtas that are authoritative, accurate and objective. To date the majority of the L&RS outputs have been text based.

L&RS Information and research services include the following:

* a legislative analysis briefing service for all Members
* regular research briefings on topical issues for all Members
* research for individual Members and Committees
* information skills training
* access to collections

The L&RS offers these services in line with its strategic plan and statement of services under the broad headings of research and analysis, value added information and information management and governance.

Further information on the Houses of the Oireachtas and the Oireachtas Library & Research Service is available at [www.oireachtas.ie](http://www.oireachtas.ie)

The challenge for this project is to provide a visual representation of the budget process from the perspective of the Houses of the Oireachtas that is visually engaging as well as being authoritative, accurate and objective.

It is intended that this infographic will be part of a wider suite of Library & Research Service products published for Budget 2015. The infographic may also be used in other L&RS publications as appropriate.

The maximum budget for this project is €2,000. Costs will be evaluated in accordance with Department of Finance guidelines, see Section 7.

1. **Objective**

The purpose of this document is to obtain a suitable service provider who has the professional ability, skills and knowledge to deliver one infographic (graphical presentation) of the Irish budget process from the perspective of the Houses of the Oireachtas (Parliament).

The table below is an indicative timeframe for the project:

|  |  |
| --- | --- |
| Tender issued | Late June 2014 |
| Tender Reponses | 25 July 2014 |
| Tender awarded | August 2014 |
| Work commences | 1September 2014 |
| 1st Draft infographic | 9 September |
| Final infographic delivered | 17 September 2014 |

1. **Specification of requirements**

The necessary requirements for this contract include the following content and technical specifications.

*4.1. Content specification*

The infographic must represent the role & functions of the Houses of the Oireachtas and their committees in the budget process. The L&RS will advise the successful tenderer about the role of the Houses of the Oireachtas and their committees in the budget process.

Appendix 1 provides a summary of the Irish budget process along with a description of the role of the Oireachtas.

The precise content will be agreed after the tender has been awarded.

*4.2. Technical specification*

The infographic must be capable of being clearly rendered in A4 and A3 size.

The infographic must be delivered as a .psd file.

The tenderer may choose to deliver more than one version of the final infographic as it must be possible to print it (A3 and A4) as well as publishing it on the Library & Research Service WordPress website.

**5.0 Contract Management**

This contract will be managed by Charlotte Cousins, Oireachtas Library & Research Service (or such other person from the Oireachtas Library & Research Service as may be notified to the successful tenderer by the Contracting Authority from time to time).

It is expected that there will be at least one kick off meeting after the tender has been awarded to confirm approach and content, and at least one draft infographic delivered to the L&RS before delivery of the final approved infographic.

**6.0 Qualification & Selection Criteria**

It is intended that only those tenderers with adequate professional/technical qualifications, experience and standing will qualify for award of contract.

The Contracting Authority requires proof of the tenderer’s sound professional standing. Proof must be provided by the following means:

**6.1 Declaration of Bona Fides:**

Completed and signed Declaration of Bona Fides at Section 13.

**6.2 Previous similar services provided:**

Tenderers must demonstrate that they/ their organisation have a suitable level of skills, knowledge and personnel to perform the contract.

Please provide a brief description of the tenderers (or the companies) history/profile which indicates their involvement in supplying similar services within this industry. (Maximum 1 page)

|  |
| --- |
| Include:a) Number of Persons,b) Position / Roles,c) Companies/Individuals background in providing similar services (e.g. designing & delivering Infographics) to those required under this contract |

Provide details in the box below of two (2) relevant references where similar services have been supplied by the tenderer as per the requirements as set out in this RFQ. The Contracting Authority reserves the right to contact of these referees directly on a confidential basis without further reference to the tenderer.

|  |
| --- |
| **Project 1 (1/2 page maximum)**Client Name: Project Overview and Description:Value (if any): € Contract Duration: Client Contact Name & Details:  |

|  |
| --- |
| **Project 2 (1/2 page maximum)**Client Name: Project Overview and Description:Value (if any): € Contract Duration: Client Contact Name & Details:  |

**6.3. Quality of Personnel**

Tenderers must demonstrate that each individual proposed to carry out the work required under this RFQ has the relevant experience, skills and knowledge to perform the contract.

|  |  |
| --- | --- |
| **Please advise the name of your nominated lead who will carry out this work, their role and any supports available to him/her (Please also provide CVs for each individual who will be working on the provision of these services)**  |  |
| *Suppliers Response: (1 page max)* |

**6.4 Sub-Contractors / Partners:**

Tenderers must provide information on any sub-contractors or partners proposed and the role/ relationship with the sub-contractor or partner

**Only those tenders who satisfy conditions in relation to the above will be eligible for inclusion in the award process**

**7.0 Award Criteria – 1000 marks available**

Quotations for this RFQ will be evaluated on the basis of identifying the most economically advantageous valid tender received in accordance with the following award criteria.

**The Award Criteria will be scored as follows:**

|  |  |
| --- | --- |
| **Criteria** | **Score –1000 marks available** |
| **1) Functional & Technical Ability (450 Marks)****Sub-criteria to include:** * Understanding of the Oireachtas requirements (150 marks)
* Demonstrated approach and methodology to designing and delivering the infographic, including an appropriate project plan. (200 marks)
* Quality Assurance Systems (100 marks)
 | **450** |
| **2) Contract Management (150 Marks)*** Demonstrated approach to project management, including determination of content and timelines (150 marks)
 | **150** |
| **3) Overall Costs (400)** | **400** |

Tenderers should specifically address each of these award criteria in their tenders.

Tenderers should note that they must achieve a minimum of 50% of the total marks allocated for each of the individual non-cost award criteria in order to avoid elimination from the competition.

**Methodology for Evaluation of Tenders Received:**

Cost Criteria (400 marks): the highest score is awarded to the Tenderer with the lowest ultimate Cost. All other Tenderers cost scores are calculated pro rata in relation to this score as per the following formula:

**Maximum point’s available x Lowest responsive valid tender**

**Value of individual tender**

All other Award Criteria (60 marks): Scoring of these Criteria will be based on the tender responses and the full provision of the information requested. The Evaluation Group will assess the information provided and attribute scoring on a rating of 1 – 10 (pro rata) as follows:

**For scoring purposes these are ranked under the headings of:**

 **Excellent (9-10) – top score**

 **Very good (7-8)**

 **Good (5-6)**

 **Fair (3-4)**

 **Poor (1-2) – lowest score**

During the evaluation period clarification may be sought in writing from tenderers. Responses to requests for clarification may not materially change any of the elements of the tenders submitted. No unsolicited communications from tenderers will be entertained during the evaluation period.

**8.0 Tenderers Response Section**

**Tenderers must give their response to this request for quotation by completing the questions as set out in the response section provided below. This section must be completed in full.**

The following questions will be used to assess and score each tenderer’s response.

* Tenderers must ensure to provide all relevant information in each of the boxes outlined below.
* Only information provided here and any referenced appendices will be considered in the evaluation process.

**8.1 Mandatory Award Criteria Requirements: (response required here)**

The following requirements are mandatory – Tenderers will either pass or fail these criteria.

Tenderers must confirm they have read and accept the terms and conditions of this RFQ as set out in sections 10, 11, 12, and 13.

|  |  |  |
| --- | --- | --- |
| Confirmation (pass/fail) | **YES** | **NO** |
| Please indicate with X in relevant box. |  |  |

**8.2 Award Criteria**

Functional & Technical Ability– **450 marks**

Customer Service & Contract Management – **150 marks**

Costs – **400 marks**

|  |  |
| --- | --- |
| **Functional & Technical Ability**  | **Score – 450 marks available in total** |
| **Question 1.** Please confirm your understanding of the Oireachtas requirements including an outline of any challenges you see in relation to the delivery of this project. | **(150 Marks)** |
| *Suppliers Response: (1 page max)* |

|  |  |
| --- | --- |
| **Question 2.** Please advise of your approach and methodology to the design and delivery of an infographic as required in this specification. Your response should include delivery timelines/project plan. |  **(200 Marks)** |
| *Suppliers Response: (1 page max)* |

|  |  |
| --- | --- |
| **Question 3.** Please advise of your quality assurance systems which would ensure high quality services for the Oireachtas.  | **(100 Marks)** |
| *Suppliers Response: (1 page max)* |

|  |  |
| --- | --- |
| **Customer Service & Contract Management**  | **Score – 150 marks available in total** |
| Question 4. Please advise how you propose to manage this contract to satisfactory conclusion, including any timelines for deliverables and contingency risks. | ***(150 Marks)*** |
| *Suppliers Response: (1 page max)* |

**9. Financial Arrangements**

**9.1** The Houses of the Oireachtas Service will pay on receipt of an invoice for work agreed. The gross payment will be all-inclusive.

**9.2** This is a fixed price contract and the Communications Unit intends to make a single payment on completion of the contract. Payment is subject to the rights reserved by the Contracting Authority in the Clauses below:

* No chargeable work will be paid by the Contracting Authority unless cleared in advance and on foot of comprehensive documentation.
* If for any reason the Contracting Authority is dissatisfied with the performance of the successful tenderer, an appropriate sum (Retention Payment) may be withheld from any payment otherwise due. In such event the Contracting Authority shall identify the particular services with which it is dissatisfied together with the reasons for such dissatisfaction, and payment of the Retention Payment will be made upon remedy of any unsatisfactory work or resolution of outstanding queries. The Contracting Authority shall hold the Retention Payment on behalf of the successful tenderer but without any obligation to invest. The terms of this Clause shall be without prejudice to and not be in substitution for any remedy of the Contracting Authority under this Agreement.
* The provisions of the Prompt Payment of Accounts Act 1997, as amended or revised, and the European Communities (Late Payment in Commercial Transactions) Regulations, 2002 shall apply to the payment.
1. **Pricing/Schedule of Costs**

**Tenderers must complete the Form of Tender Costs at section 15.**

All costs must be quoted in Euro (€), exclusive of VAT and the schedule must take the following format:

1. The ultimate cost of the tender (best and final offer);
2. A full breakdown of the price based on consultancy per day, per week or other timeframe division. The number of days work you would expect to undertake should be specified;
3. Support costs should also be stated;
4. If VAT is applicable, then please provide the rate of VAT in respect of the service being proposed.

**11. General Conditions of Tender**

**11.1** The terms outlined in this RFQ shall form part of the contract documents. Such contract as may be awarded will not be concluded/take effect until after unsuccessful tenderers have been notified of the result of this tendering procedure.

**11.2** Information supplied by tenderers will be treated as contractually binding.

However, the Contracting Authority reserves the right to seek clarification or verification of any such information.

**11.3** Tenderers must indicate in their tenders any share of the contract they may

intend to subcontract to third parties and identify any such proposed subcontractors.

**11.4** Tenderers will be subject to all legal provisions in relation to public sector procurement, including but not limited to freedom of information, confidentiality, invoicing, prompt payment of accounts, referees, health & safety and conflicts of interest.

**11.5** The Contracting Authority reserves the right to update any information contained in this RFQ at any time.

**11.6** The Contracting Authority reserves the right not to proceed with any of the items specified in this RFQ if circumstances so warrant it.

**11.7** No commitment of any kind, contractual or otherwise shall exist unless and until a formal written contract has been executed by or on behalf of the Contracting Authority. Any notification of preferred bidder status by the Contracting Authority shall not give rise to any enforceable rights by the Tenderer. The Contracting Authority may cancel this public procurement competition at any time prior to a formal written contract being executed by or on behalf of the Contracting Authority. The Contracting Authority does not bind itself to accept the lowest priced or any Tender.

**11.8** No part of the project can be used for any other purpose at any time without the Contracting Authority’s consent. The ultimate use of project outputs (including any reports or other documents produced by the successful tenderer) is a matter solely for the Contracting Authority.

**11.9** The Contracting Authority will use its best efforts to hold confidential any information provided by tenderers subject to their obligation under law, including the Freedom of Information Acts 1997 and 2003. Tenderers should indicate, when tendering, what parts of their tenders are commercially sensitive and which they consider should be kept confidential should an FOI request be received. The Contracting Authority will consult with tenderers about any such sensitive information before making a decision on any FOI request received. Similarly, the Contracting Authority requires that all information provided pursuant to this invitation to tender will be treated in strict confidence by tenderers.

**11.10** Any conflicts of interest involving a tenderer must be fully disclosed to the Contracting Authority particularly where there is a conflict of interest in relation to any recommendations or proposals put forward by the tenderer.

Any registrable interest involving the tenderer and the Contracting Authority, members of the Government, members of the Oireachtas or their relatives must be fully disclosed in the response to this RFQ, or should be communicated to the Contracting Authority immediately upon such information becoming known to the tenderer, 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 'registrable interest' and 'relative' shall be interpreted as per section 2 of the Ethics in Public Office Act, 1995.

**11.11** In the event of a group of respondents jointly submitting an acceptable offer, the contract will be awarded by the Contracting Authority to one contractor who acts as the agreed prime contractor. The prime contractor is responsible for the delivery of all services provided for under the terms of the contract and shall assume all the duties, responsibilities and costs associated with the position of prime contractor.

**11.12** The successful tenderer shall be responsible for the delivery of all services provided for within the contract on the basis of a fixed price agreement set at the beginning of the contract. Prices quoted in the tender cannot be increased during the currency of the tender. Similarly, terms and conditions cannot be altered.

**11.13** The Contracting Authority retains the right to withhold payment where a contractor has failed to meet his/her contractual obligations in relation to the delivery of services to an acceptable level of quality as set out in Section 7 of this RFQ.

**11.14** The Contracting Authority will not be liable in respect of any costs incurred by tenderers in the preparation of tenders or any associated work effort.

**11.15** Responses to this RFQ will be evaluated in their own right. No recognition will be given to information previously submitted.

**12. Conditions of Contract**

**12.1** **Termination of Contract**

The Contract shall continue until the end date unless either party gives to the other not less than one week prior written notice of termination or unless the Contract is terminated in accordance with any of the provisions of this clause or any other clause of this RFQ.

The proposed contract shall include the following provisos, inter alia:

(a) Default:

If the successful tenderer shall default in any of the following respects:

(i) wholly suspending any part of the provision of services without reasonable cause;

(ii) failing to carry out the service with reasonable diligence;

(iii) refusing or persistently neglecting to comply with a notice in writing from the Contracting Authority;

then if such default shall continue for 5 working days after a notice is served by delivery to the successful tenderer at its place of business or by sending the notice by prepaid registered post or facsimile transmission or by electronic mail to the address or facsimile number or electronic mail address of the successful tenderer specifying the default, the Contracting Authority may, without prejudice to any other rights or remedies, thereupon and at the latest within ten days of the expiry of the said five working days, by notice by registered post, facsimile transmission or electronic mail terminate the contract.

After such notice to the successful tenderer from the Contracting Authority, the successful tenderer shall return all property belonging to the Contracting Authority, including all property held in electronic format. The successful tenderer shall not remove, edit or in any way tamper with such property.

In the above case the following shall apply:

(i) The Contracting Authority may engage and pay another supplier or other person or persons to carry out and complete the service.

(ii) Following termination of the contract, payment for services/supplies shall be made only up to the date of the initial notice.

(iii) The Contracting Authority reserves the right to recover from the successful tenderer any loss.

* 1. **Dispute Resolution under the Contract**

The parties shall seek to resolve any disputes between them, arising out of or relating in any way to the issues covered by this RFQ or the Contract amicably. Any and all disputes or differences which arise between the parties in respect of the construction, interpretation or effect of the RFQ or Contract or the rights and duties and liabilities of the parties or in relation to any matter connected with or arising out of the RFQ or Contract shall be referred in the first instance by either party to contract managers to be nominated by both parties in the contract. The contract managers shall then raise and seek to resolve the dispute.

**12.3 Waiver of Confidentiality**

It shall be a condition of the contract between the Contracting Authority and the successful tenderer that the successful tenderer shall agree that the Contracting Authority, pursuant to Directive 89/665/EEC and applicable EC Treaty principles, may release all and any information whether constituting confidential information or otherwise (including but not limited to information in documentary form, oral, electronic, audio-visual, audio-recorded or otherwise including any copy or copies thereof and whether scientific, commercial, financial, policy-related, technical or otherwise) arising out of under or in connection with the tender process or any part thereof and the successful tenderer shall waive any claim of confidentiality, howsoever arising, over all and any such information.

**12.4 Indemnity**

It shall be a condition of the contract that the successful tenderer shall indemnify and hold harmless the Contracting Authority against any claims, proceedings, actions, loss or expense whatsoever (including legal costs and expenses) either to itself, its employees, agents, representatives and subcontractors or to any third party as a result of the successful tenderer, its employees, agents, representatives and subcontractors, acting deliberately or with reckless disregard to the interests of the Contracting Authority or any other party or otherwise acting in a manner which is grossly negligent or in wilful default of the successful tenderer’s obligations under the contract or which arises as a result of its (including its employees, agents, representatives and subcontractors) own acts, default or neglect in the provision of the Services.

**12.5 Licensing Policy**

The successful tenderer shall ensure that all and any necessary consents and or licences for any software, instrument, modality or methodology are obtained and in place before use prior to signing a contract for the purposes of this RFQ and the successful tenderer shall indemnify the Contracting Authority for and in respect of all and any third party intellectual property rights in so far as any such rights are used for the purposes of the contract to be signed.

**12.6 Intellectual property rights**

All intellectual property rights, title and interest in all reports, data manuals, other materials or programs (including without limitation all and any audio or audio visual recordings, transcripts, books, papers, records, notes, illustrations, photographs, diagrams) produced for the purposes of this presentation (collectively ‘the Materials’) (or any part or parts thereof) shall vest in the Contracting Authority.

**12.7 Jurisdiction**

All services/supplies carried out on foot of this RFQ and subsequent contract shall be governed by the laws of Ireland and subject to the exclusive jurisdiction of Ireland

**12.8 Tax Clearance**

Before a contract is awarded the successful tenderer (and agent, where appropriate) will be required to promptly produce a Tax Clearance Certificate, or in the case of a non-resident tenderer, a statement from the Revenue Commissioners confirming suitability on tax grounds. Non-residents should contact the Office of the Revenue Commissioners, Revenue Residence Section, Government Offices, Nenagh Co. Tipperary. In addition, contractors must retain records of tax reference numbers for any subcontractors where payments exceed €650 (incl. VAT).

Tenderers should note that the provisions of Department of Finance Circular 43/2006 apply and the Contracting Authority may require sight of Tax Clearance Certificates for any subcontractor where payments exceed €2,600. Forms are attainable from the following address: Office of the Revenue Commissioners, Sarsfield House, Limerick. Where a Tax Clearance Certificate expires within the course of the contract, the Contracting Authority reserves the right to seek a renewed certificate. All payments under the contract will be conditional on the contractor(s) being in possession of a valid certificate at all times.

1. **OIREACHTAS DECLARATION OF BONA FIDES**

**THIS DECLARATION, DULY COMPLETED, MUST BE SUBMITTED BY ALL TENDERERS AND** **SIGNED BY A DULY AUTHORISED OFFICER OF THE TENDERER’S ORGANISATION**

|  |  |
| --- | --- |
| **Name of Tenderer:** |  |
| **Address:** |  |
| **Please tick Yes or No as appropriate to the following statements relating to the current status of your organisation.** |
| **No.** | **QUESTION** | **YES** | **NO** |
| 1. | The Tenderer is bankrupt or is being wound up or its affairs are being administered by the court or has entered into an arrangement with creditors or has suspended business activities or is in any analogous situation arising from a similar procedure under national laws and regulations.  |  |  |
| 2. | The Tenderer is the subject of proceedings for a declaration of bankruptcy, for an order for compulsory winding up or administration by the court or for an arrangement with creditors or of any other similar proceedings under national laws and regulations.  |  |  |
| 3. | The Tenderer, a Director or Partner, has been convicted of an offence concerning his professional conduct by a judgement which has the force of res judicata or been guilty of grave professional misconduct in the course of their business. |  |  |
| 4. | The Tenderer has not fulfilled its obligations relating to the payment of taxes or social security contributions in Ireland or any other State in which the tenderer is located. |  |  |
| 5. | The Tenderer, a Director or Partner has been found guilty of fraud. |  |  |
| 6. | The Tenderer, a Director or Partner has been found guilty of money laundering.  |  |  |
| 7. | The Tenderer, a Director or Partner has been found guilty of corruption. |  |  |
| 8. | The Tenderer, a Director or Partner has been convicted of being a member of a criminal organisation. |  |  |
| 9. | The Tenderer has been guilty of serious misrepresentation in providing information to a public buying agency. |  |  |
| 10. | The Tenderer has contrived to misrepresent its Health & Safety information, Quality Assurance information, or any other information relevant to this application.  |  |  |
| I certify that the information provided above 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 may lead to my organisation being excluded from participation in this and future tenders. |
| Signature |  | Date |  |
| Name |  | Position |  |
| Telephone |  | Email |  |

1. **FORM OF TENDER - Costs:**

 **This is a fixed price tender for the duration of the contract.**

All costs must be quoted in Euro (€), exclusive of VAT. The schedule below must be completed in full to be considered for the evaluation process.

|  |  |
| --- | --- |
| TO: | **Houses of the Oireachtas Service** |
| FROM: |  |
|  |  |
| **Details** | **Euro Cost (excluding VAT)** | **Applicable****Vat Rate** |
|  |  |  |
| **Total Costs** |  |  |
| **Please Confirm your Daily Rate that applies to costs above** |  |  |

* Prices quoted are in Euro (€) and this offer will remain open for acceptance by you for a period of 6 months from the date of deadline for submission of tenders.
* I/We undertake to deliver the services in accordance with the tender specification.
* I/We undertake to maintain full confidentiality with regard to all aspects of this tender process.
* I/We acknowledge that you are not obliged to accept the lowest or any offer and that following tender evaluation, we may be offered all or part only of the contract.

|  |  |  |  |
| --- | --- | --- | --- |
| **Signed:** |  | **Position in company:** |  |
| **Print Name:** |  | **Phone No:**  |  |
| **Company Name:**  |  | **Date:** |  |
| **Address:**  |  |

1. Houses of the Oireachtas - CV Template

**Note: Please complete this Curriculum Vitae Format for *each* named key personnel proposed to be a member of the team being put forward by the tenderer (include Project Manager & Key point of Contact) for this tender.**

***Personal Details***

|  |  |
| --- | --- |
| Name: |  |

***Relevant Educational and Training Record***

|  |  |  |
| --- | --- | --- |
| Description | Year Obtained | Accreditation Body |
|  |  |  |
|  |  |  |
|  |  |  |

***Relevant Employment Record (Please start with your current / most recent position)***

|  |  |  |
| --- | --- | --- |
| Employer | Period | Position and Expertise |
|  |  |  |
|  |  |  |
|  |  |  |

***Experience Relevant to these Services***

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**Appendix 1**

**Summary of the Irish Budget Process**

The principle legislation governing the Budget process includes the following:

* Constitutional of Ireland (1937)
* Standing Orders of Dáil Éireann and Seanad Éireann
* Provisional Collection of Taxes Act (1927)
* Interpretation Act (2005)
* Finance Acts
* Social Welfare Acts
* Appropriate Acts

The Budget process is continuous in that the Tax Acts remain permanently in force unless or until they are changed by the Oireachtas. Taxes are paid each day thus the Budget process has a distinct, cyclical pattern involving:

1. The monitoring of tax collection throughout the year and planning for corrective action in the forthcoming Budget, leading to Finance Bill legislation.
2. The Estimates Process requiring forecasts of revenues and projected expenditure in the following year i.e. the framing of the Budget ‘arithmetic’.

The Irish budget process comprises a series of steps, as follows:

|  |  |
| --- | --- |
| **General cycle** | **Oireachtas role** |
| **Step 1: Preparation of the Finance Bill** * Commences 6-8 months prior to Budget Day.
* Department of Finance chooses proposals to include. Sources include:
1. Government programmes/policy
2. Pre-budget submissions from representative bodies
3. Party political manifestos
4. Court decisions
5. Reports of Commissions/Tribunals
6. Implementation of EU Directives
* Irish Fiscal Advisory Council (IFAC)
 | * The Joint Committee on Finance, Public Expenditure and Reform (JCFPER) [invites written submissions](http://www.oireachtas.ie/parliament/oireachtasbusiness/committees_list/fper-committee/callfor2015pre-budgetsubmissions/) on the Budget (by mid-year). The JCFPER reviews submissions and may hold public hearings and prepare a summary report to the Houses of the Oireachtas and the Minister for Finance.
* The JCFPER scrutinises the IFAC biannual ‘Fiscal Assessment Reports’ and holds twice-yearly public hearings with the IFAC to discuss the FAR.
 |
| **Step 2: Pre-Budget Economic and Fiscal Outlook published** (Just prior to Budget Day) | The JCFPER holds a hearing with DoF officials to scrutinise the document upon which the IFAC endorsement is based.  |
| **Step 3 Irish Fiscal Advisory Council endorsement** * 7-10 days prior to ‘Budget Day’.
* Department of Finance provides economic forecasts for the current and following 3 years to the IFAC.
* IFAC endorses projections
 |
| **Step 4: White Paper on Receipts and Expenditure published** * Sets out the receipts and expenditure for each Department in the current year and projections for the next year..
* Pursuant with Art. 28 of the Constitution.
* Published weekend before ‘Budget Day’.
 | N/A |
| **Step 5: ‘Budget Day’ (Financial Statement)** * On or before 15 October.
* Minister for Finance presents Budget for the next year to Dáil Éireann.
* *Comments* on:
1. Economic performance in previous year
2. General economic situation
3. Proposed changes in taxation
4. Estimates of Expenditure for the coming year.
* Annual Stability Programme Update also published.
 | Minister for Finance presents Budget for the next year to Dáil Éireann. Opposition finance spokespeople and individual spokesperson speak on the Budget Statement.  |
| **Step 6: Financial resolutions*** Give temporary statutory effect to certain taxation measures (by midnight).
* Remainder includes in the Finance Bill.

3 pieces of implementing legislation for the Budget: * Finance Bill
* Social Welfare Bill
* Appropriation Bill
 | Vote is held on certain temporary measures (taxation-based). Temporary resolutions must pass Dáil Éireann on Budget Day and become effective by midnight.  |
| **Step 7: Finance Bill** **(1st Stage) – Introduction**(See [here](http://www.oireachtas.ie/viewdoc.asp?fn=/documents/bills28/bills/2013/10213/document1.htm) for full summary of previous Finance Bill passage for Budget 2014)* Schedule for publication of the Bill and for subsequent stage debates agreed.
* Bill accompanied by an Explanatory Memorandum.

**Finance Bill (2nd Stage) – Debate Stage*** Usually 7-10 days later, Bill introduced by the Minister to the Dáil for debate.
* Can include measures not announced or debated on Budget Day.
* Dáil votes to progress the Bill to Committee stage.
* Bill [referred](http://oireachtasdebates.oireachtas.ie/debates%20authoring/debateswebpack.nsf/takes/dail2013111300022?opendocument#U02900) to the Oireachtas Select sub-Committee on Finance.

**Finance Bill (3rd Stage) – Committee Stage** * More detailed examination of the Bill.
* Amendments proposed.

**Finance Bill (4th Stage) – Report Stage** * Bill reverts to the Dáil to allow Members comment on Bill as amended by the Committee.
* Amendments cannot be moved at this stage unless it arises out of Committee Stage proceedings and even then usually to correct errors or omissions.
* Bill can be recommitted to Committee Stage to discuss amendment.

**Finance Bill (5thStage)** * Motion is put “That the Bill do now Pass”.
* Final remarks from Members.
* Substantive amendments can no longer be made.

**Finance Bill – Seanad Stage** * Constitution provides that every Bill must be sent to the Seanad.
* Seanad cannot amend a ‘Money’ Bill but can make recommendations.
* Bill can be returned to Dáil where recommendations can be taken through Committee/Report Stages.
* If no recommendations, returns to the Dáil.

**Finance Bill – Enactment** * Ceann Comhairle informs House that Senate has accepted Finance Bill.
* Deemed passed by both Houses of the Oireachtas.
* Presented to An Taoiseach and the President for signature.
* Upon signature, becomes Finance Act.

A similar legislative procedure applies for the *Social Welfare Bill* and the *Appropriations Bill.* | Under new rules, the Finance Bill should complete its passage through the Oireachtas by 31 December each year (65-70 days after Budget Day). First, the Finance Bill passes the following stages in the Dáil and then the process repeats in the Seanad.Measures which did not feature in the Budget speech or changes to measures announced in the Budget. Stage concludes with the Dáil formally voting on a motion that the Bill proceed.  |
| Detailed examination, analysis and amendment of the Finance Bill by the Oireachtas sub-Committee on Finance. Resources may be provided upon request by the Oireachtas Library & Research Service.  |
| **🡨 See** General cycle |
| **Step 9:****Appropriations Bill.**To give statutory effect and authority to the Estimates previously approved by the Dáil | Passed by Dáil and Seanad.  |
| **Step 8: Revised Estimates for Public Services published** | Estimates are Laid before Dáil ÉireannThe relevant Select Committee considers the proposed expenditure for each Department as outlined in the Estimates.Estimates approved by the Dáil. |