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Tender

Pensions Consultancy Service for English Heritage

English Heritage Trust

F02: Contract notice

Notice identifier: 2024/S 000-002849

Procurement identifier (OCID): ocds-h6vhtk-043536

Published 29 January 2024, 8:40am

Section I: Contracting authority

I.1) Name and addresses

English Heritage Trust

The Engine House, Fire Fly Avenue,

Swindon,

SN2 2EH

Contact

Andrew Kennedy

Email

procurement2@english-heritage.org.uk

Country

United Kingdom

NUTS code

UKK - South West (England)

Internet address(es)

Main address

<https://in-tendhost.co.uk/english-heritage>

I.3) Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://in-tendhost.co.uk/english-heritage>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted to the above-mentioned address

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Recreation, culture and religion

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Pensions Consultancy Service for English Heritage

Reference number

P/REF EH 00002018

II.1.2) Main CPV code

- 66523000 - Pension fund consultancy services

II.1.3) Type of contract

Services

II.1.4) Short description

We are seeking to appoint a pensions consultancy to:

- Review the appropriateness of our current defined contribution default pension fund, and provider, relative to the profile of our workforce
- Do a detailed governance review of the pension fund and provider annually, relative to investment performance, customer service, etc.
- Produce and update EH's pensions literature for the workforce, so that it is accessible and easily understood
- Keep EH up to date with changes to pensions legislation and best practice and make suggestions as to how pensions operations could be improved.

II.1.5) Estimated total value

Value excluding VAT: £250,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 66523000 - Pension fund consultancy services

II.2.3) Place of performance

NUTS codes

- UKG - West Midlands (England)
- UKH - East of England
- UKF - East Midlands (England)
- UKJ - South East (England)
- UKC - North East (England)
- UKK - South West (England)
- UKD - North West (England)

Main site or place of performance

This is a pensions consultancy service for the charity - which has regional bases across England.

II.2.4) Description of the procurement

We are seeking to appoint a pensions consultancy to:

- Review the appropriateness of our current DC default pension fund, and provider, relative to the profile of our workforce
- Do a detailed governance review of the pension fund and provider annually, relative to investment performance, customer service, etc.
- Produce and update EH's pensions literature for the workforce, so that it is accessible and easily understood
- Keep EH up to date with changes to pensions legislation and best practice and make suggestions as to how pensions operations could be improved.

II.2.5) Award criteria

Price is not the only award criterion and all criteria are stated only in the procurement documents

II.2.6) Estimated value

Value excluding VAT: £250,000

II.2.7) Duration of the contract, framework agreement or dynamic purchasing system

Start date

1 April 2024

End date

31 March 2029

This contract is subject to renewal

Yes

Description of renewals

The above dates include an initial term of 3 years, with provision to extend by 2 further year - maximum term of 5 years.

II.2.10) Information about variants

Variants will be accepted: Yes

II.2.11) Information about options

Options: No

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

Section III. Legal, economic, financial and technical information

III.1) Conditions for participation

III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions

All information is provided within the tender documents. Submissions will be evaluated using a combination of price and quality factors.

III.1.2) Economic and financial standing

Selection criteria as stated in the procurement documents

III.1.3) Technical and professional ability

Selection criteria as stated in the procurement documents

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Open procedure

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.2) Time limit for receipt of tenders or requests to participate

Date

27 February 2024

Local time

12:00pm

IV.2.4) Languages in which tenders or requests to participate may be submitted

English

IV.2.7) Conditions for opening of tenders

Date

27 February 2024

Local time

12:30pm

Place

Opening via the In-tend system.

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: No

VI.4) Procedures for review

VI.4.1) Review body

English Heritage

The Engine House, Fire Fly Avenue,

Swindon,

SN2 2EH

Email

procurement2@english-heritage.org.uk

Country

United Kingdom

VI.4.3) Review procedure

Precise information on deadline(s) for review procedures

Any queries can be directed to the email address above in the first instance.