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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](mailto: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

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## **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

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### **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

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## **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.

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## **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](mailto: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.