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Tender

## **Corporate Software & Related Products and Services**

Crescent Purchasing Limited

F02: Contract notice

Notice identifier: 2022/S 000-003856

Procurement identifier (OCID): ocds-h6vhtk-02c7b4

Published 10 February 2022, 1:54pm

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Crescent Purchasing Limited

Procurement House, Leslie Hough Way

Salford

M6 6AJ

#### **Email**

[j.edwards@thecpc.ac.uk](mailto:j.edwards@thecpc.ac.uk)

#### **Telephone**

+44 1618231860

#### **Country**

United Kingdom

**NUTS code**

UKD3 - Greater Manchester

**Internet address(es)**

Main address

[www.thecpc.ac.uk](http://www.thecpc.ac.uk)

Buyer's address

[www.thecpc.ac.uk](http://www.thecpc.ac.uk)

**I.3) Communication**

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

<https://suppliers.multiquote.com>

Additional information can be obtained from another address:

Crescent Purchasing Limited

Procurement House, Leslie Hough Way

Salford

M6 6AJ

**Email**

[j.edwards@thecpc.ac.uk](mailto:j.edwards@thecpc.ac.uk)

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Main address

[www.thecpc.ac.uk](http://www.thecpc.ac.uk)

Buyer's address

[www.thecpc.ac.uk](http://www.thecpc.ac.uk)

Tenders or requests to participate must be submitted electronically via

<https://suppliers.multiquote.com>

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**

Education

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**Section II: Object****II.1) Scope of the procurement****II.1.1) Title**

Corporate Software & Related Products and Services

Reference number

CA9891 - CPC/JE/01/2021

**II.1.2) Main CPV code**

- 48422000 - Software package suites

### **II.1.3) Type of contract**

Supplies

### **II.1.4) Short description**

The CPC is seeking to establish a multi-provider framework agreement on behalf of CPC members for the provision of corporate Software and Related Products for a number of areas as detailed below.

The Framework Agreement will be split into 9 lots as follows:

Lot 1 – Financial Management Software

Lot 2 – Human Resource Software

Lot 3 – Payroll System Software

Lot 4 – Multi-Purpose Lot for Lots 1 -3

Lot 5 – Management Information Systems (MIS)

Lot 6 – Educational Management and Communications Software excluding MIS

Lot 7 – Project Management & Resource Planning Software

Lot 8 – Customer Relationship Management (CRM) Systems

Lot 9 – Estates Management Software including CAFM Systems

The supply of Corporate Software & Related Products and Services framework agreement is open to both Software Providers and Software Resellers that will offer additional benefits through collaborative and innovative partnerships with CPC members.

Open to CPC members and the wider public sector.

### **II.1.6) Information about lots**

This contract is divided into lots: Yes

Tenders may be submitted for maximum number of lots

9

Maximum number of lots that may be awarded to one tenderer: 9

## **II.2) Description**

### **II.2.1) Title**

Lot 1 – Financial Management Software

Lot No

1

### **II.2.2) Additional CPV code(s)**

- 48443000 - Accounting software package
- 48812000 - Financial information systems
- 48440000 - Financial analysis and accounting software package
- 48442000 - Financial systems software package
- 48441000 - Financial analysis software package
- 72212442 - Financial systems software development services
- 72212441 - Financial analysis software development services
- 72212443 - Accounting software development services
- 72212440 - Financial analysis and accounting software development services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

Greater Manchester

## II.2.4) Description of the procurement

### Lot 1 – Financial Management Software

This lot is for the provision of a range of software for the purpose of Financial Management Solutions including but not limited to the following aspects of supply as required by members:

- Financial Management Software ensuring usability and accessibility is embedded within the software
- Accurate and reliable financial data processing and reporting
- Provision for general ledger, forecasting/budgeting, raising of purchase orders and a fully integrated fixed asset module if required by members
- e-Procurement: electronic ordering with the ability to authorise, issue orders by email and confirm goods received electronically
- Associated financial management modules and or tools, including but not limited to planning / budgeting / analytics for financial requirements
- Facility to analyse, and report, at sub-account level, for project accounting and cross Member activity
- Proven monthly/annual close down accounting processes in line with best practice
- “Workflow” flexibilities to include but not limited to absence management procedures
- “Self-serve” transactional processes fully automated to include but not limited to, raising/processing sales invoice requests, departmental budget recharges, procurement card transaction logs, adding new suppliers, direct debit mandates, expenses input/authorisation
- Potential for supporting shared service offer for other organisations if required by members
- Fully compatible and automated interface with other systems as required by members, which may include but are not limited to the following:
  - BACS
  - HR Software
  - Payroll Software

- Management Information Services / Student Records Systems
- Customer Relationship Management
- Commitment reporting, in a format understandable to users
- Simple to use integrated report writer capable of enabling users to produce and store high quality and visually presentable reports and allow the management accounts to be produced to a professional standard/layout
- A facility to drill down from standard management accounts
- The ability to store scanned images of prime documents such as purchase invoices and sales invoices which will enable users to manage their budgets
- System security compliant with all current legislation and best practice including but not limited to two factor authentication, if required by members
- Secure storage and legal compliance of financial information and associated data
- Flexible coding structure, allowing changes in structures/coding to be made easily, including options for parent/subsidiary and multi company/currency, and ability to store several budgets and forecasts including but not limited to original budgets, revised budgets
- Flexible structure, allowing changes in organisational structures including but not limited to mergers of organisations
- The security maintenance of the system must satisfy requirements including but not limited to segregation of duties, however there is a need to maintain the flexibility required in a large complex organisation such as a multi academy trusts and not be overly burdensome in its administration for academies, schools, colleges or as appropriate
- Compliance with all required law and financial accounting and management best practice
- A facility to update/upgrade, allowing the member institutions to “future-proof” the system.
- Compatibility with Microsoft Office as standard to enable the uploading of journals, and download and manipulate/model information

Member requirements will vary dependant from simple off the shelf software through to bespoke systems. Requirements may include both on premise, cloud or hybrid cloud software solutions including any related products (including but not limited to hardware and

consumables), mobile applications, and related services.

Related services are also included, please see ITT for further details.

### **II.2.5) Award criteria**

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

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

Duration in months

48

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

48 month(s) from the commencement date, with 24 initial month(s) and option to extend 2x12 month(s)

### **II.2.13) Information about European Union Funds**

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

## **II.2) Description**

### **II.2.1) Title**

Lot 2 – Human Resource (HR) Management Software



Lot No

2

### **II.2.2) Additional CPV code(s)**

- 48451000 - Enterprise resource planning software package
- 72212450 - Time accounting or human resources software development services
- 72212451 - Enterprise resource planning software development services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

Greater Manchester

### **II.2.4) Description of the procurement**

Lot 2 – Human Resource (HR) Management Software

This lot is for the provision of a range of software for the purpose of Human Resource Management Solutions including but not limited to the following aspects of supply as required by members:

- Human Resource Software ensuring usability and accessibility is embedded within the software
- Accurate and reliable Human Resource data processing and reporting including trip management for staff and student where required by members
- Associated modules and or tools, including but not limited to management of personal details, training, recruitment, apprenticeship management, self-service options, and management of requirements for staff and student well-being
- Facility to analyse, and report, at all levels, including individual, departmental, faculty and Member wide
- Potential for supporting shared service offer for other organisations if required by members

- “Workflow” flexibilities to include but not limited to absence management procedures
- Fully compatible and automated interface with other systems as required by members, which may include but are not limited to the following:
  - BACS
  - Financial Management Software
  - Payroll Software
  - Management Information Services / Student Records Systems
  - Customer Relationship Management
  - Reporting, in a format understandable to users with a simple to use integrated report writer capable of enabling users to produce and store high quality and visually presentable reports in a professional standard/layout as appropriate
  - The ability to store scanned images of prime documents including but not limited to qualification certificates and DBS documentation
  - System security compliant with all current legislation and best practice including but not limited to two factor authentication, if required by members
  - The security maintenance of the system must satisfy requirements including but not limited to segregation of duties, however there is a need to maintain the flexibility required in a large complex organisation such as a multi academy trusts and not be overly burdensome in its administration for academies, schools, colleges or as appropriate
  - Compliance with all required law and human resource management best practice
  - Secure storage and legal compliance of human resource information and associated data
  - Flexible structure, allowing changes in organisational structures to be made easily including but not limited to mergers of organisations
  - A facility to update/upgrade, allowing the member institutions to “future-proof” the system
  - Compatibility with Microsoft Office as standard to enable the uploading of data, and download and manipulate/model information

Member requirements will vary dependant from simple off the shelf software through to

bespoke systems. Requirements may include both on premise, cloud or hybrid cloud software solutions including any related products (including but not limited to hardware and consumables), mobile applications, and related services.

Related services will include but are not limited to software advice and recommendations, consultancy, legal advice and compliance, advice on potential solution offerings, handover from any existing providers, implementation and commissioning, integration with other systems, a range of on-going support including helpdesk facilities both remote and onsite as required by the member, maintenance, development and innovation, de-commissioning, and handover to future providers.

### **II.2.5) Award criteria**

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

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

Duration in months

48

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

48 month(s) from the commencement date, with 24 initial month(s) and option to extend 2x12 month(s)

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union

funds: No

## **II.2) Description**

### **II.2.1) Title**

Lot 3 – Payroll Systems Software

Lot No

3

### **II.2.2) Additional CPV code(s)**

- 48442000 - Financial systems software package

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

Greater Manchester

### **II.2.4) Description of the procurement**

Lot 3 – Payroll Systems Software

This lot is for the provision of a range of software for the purpose of Payroll Systems including but not limited to the following aspects of supply as required by members:

- Payroll System Software ensuring usability and accessibility is embedded within the software
- Accurate and reliable human resource data processing and reporting
- Associated modules or tools, including but not limited to Employee Details, Leavers, Sickness, Pay Deductions, Pension, Reporting and Statutory Returns
- Potential for supporting shared service offer for other organisations if required by members

- Facility to analyse, and report, at all levels, including individual, departmental, faculty and Member wide
- “Self-service” transactional processes fully automated including but not limited to the ability for individuals to make changes to personnel details, address, and contract details
- “Workflow” flexibilities to include but not limited to absence management procedures
- Fully compatible and automated interface with other systems as required by members, which may include but are not limited to the following:
  - BACS
  - Financial Management Software
  - Human Resources Management Software
- Reporting, in a format understandable to users with a simple to use integrated report writer capable of enabling users to produce and store high quality and visually presentable reports in a professional standard/layout as appropriate
- The ability to store scanned images of prime documents including but not limited to receipts
- System security compliant with all current legislation and best practice including but not limited to two factor authentication, if required by members
- The security maintenance of the system must satisfy requirements including but not limited to segregation of duties, however there is a need to maintain the flexibility required in a large complex organisation such as a multi academy trusts and not be overly burdensome in its administration for academies, schools, colleges or as appropriate
- Compliance with all required law and best practice
- Secure storage and legal compliance of human resource information and associated data
- Flexible structure, allowing changes in organisational structures to be made easily, including but not limited to mergers of organisations
- A facility to update/upgrade, allowing the member institutions to “future-proof” the system.
- Compatibility with Microsoft Office as standard to enable the uploading of data, and download and manipulate/model information

Member requirements will vary dependant from simple off the shelf software through to bespoke systems. Requirements may include both on premise, cloud or hybrid cloud software solutions including any related products (including but not limited to hardware and consumables), mobile applications, and related services.

Related services will include but are not limited to software advice and recommendations, consultancy, legal advice and compliance, advice on potential solution offerings, handover from any existing providers, implementation and commissioning, integration with other systems, a range of on-going support including helpdesk facilities both remote and onsite as required by the member, maintenance, development and innovation, de-commissioning, and handover to future providers.

### **II.2.5) Award criteria**

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

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

Duration in months

48

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

48 month(s) from the commencement date, with 24 initial month(s) and option to extend 2x12 month(s)

### **II.2.13) Information about European Union Funds**

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

## **II.2) Description**

### **II.2.1) Title**

Lot 4 – Multi-Purpose Lot (Financial Management, Human Resource Management and Payroll Software)

Lot No

4

### **II.2.2) Additional CPV code(s)**

- 72212440 - Financial analysis and accounting software development services
- 48451000 - Enterprise resource planning software package
- 72212451 - Enterprise resource planning software development services
- 48441000 - Financial analysis software package
- 48812000 - Financial information systems
- 48410000 - Investment management and tax preparation software package
- 72212441 - Financial analysis software development services
- 48442000 - Financial systems software package
- 48440000 - Financial analysis and accounting software package
- 72212442 - Financial systems software development services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

Greater Manchester

## **II.2.4) Description of the procurement**

Lot 4 – Multi-Purpose Lot (Financial Management, Human Resource Management and Payroll Software)

This Lot is for the provision of software where a member has a requirement covering 2 or more requirements from Lot 1, 2 and / or 3 including Enterprise Resource Planning Systems (ERP).

It should however be noted where a member, has a requirement covering two or more lots, members may use the relevant individual Lots or this Lot 4 – Multi-Purpose Lot.

For clarity this lot is for the provision of a range of software for the purpose of Financial Management, Human Resource Management and or Payroll Software including but not limited to the aspects detailed in lot 1, 2 and 3.

All software procured under this lot MUST be compatible with one another unless specified by the member institution at call off.

Member requirements will vary dependant from simple off the shelf software through to bespoke systems. Requirements may include both on premise, cloud or hybrid cloud software solutions including any related products (including but not limited to hardware and consumables), mobile applications, and related services.

Related services will include but are not limited to software advice and recommendations, consultancy, legal advice and compliance, advice on potential solution offerings, handover from any existing providers, implementation and commissioning, integration with other systems, a range of on-going support including helpdesk facilities both remote and onsite as required by the member, maintenance, development and innovation, de-commissioning, and handover to future providers.

## **II.2.5) Award criteria**

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

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



Duration in months

48

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

48 month(s) from the commencement date, with 24 initial month(s) and option to extend 2x12 month(s)

### **II.2.13) Information about European Union Funds**

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

## **II.2) Description**

### **II.2.1) Title**

Lot 5 – Management Information Systems (MIS)

Lot No

5

### **II.2.2) Additional CPV code(s)**

- 48800000 - Information systems and servers
- 48810000 - Information systems
- 48190000 - Educational software package

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

Greater Manchester

### **II.2.4) Description of the procurement**

Lot 5 – Management Information Systems (MIS)

This lot is for the provision of Management Information Systems including but not limited to the following aspects of supply as required by members:

- Management Information Systems (MIS) ensuring usability and accessibility is embedded within the software not limited for use by primary schools, secondary schools, Multi Academy Trusts (MATs), Colleges and/or Universities.
- Provision of tools to effectively organize, evaluate, and manage departments within an organisation or as a whole
- Accurate and reliable Staff and Student data processing and reporting
- Accurate and reliable communication tool with the ability to filter including but not limited to communication type and recipient including but not limited for postal, email and text message services
- Associated modules or tools, including but not limited to Core Student Management Functions, Individual Learner Records, Student Monitoring including Absence Reporting, Safeguarding, Timetabling, Exam Management, Learner Support Management including but not limited to Apprenticeship Management and Individual Learning Plans, Student Support and Wellbeing, Curriculum Planning, Enquiry Management and Student Recruitment, Alumni Management, and Funding
- Facility to analyse, and report, at all levels, including individual student, class, departmental, faculty and organisation wide in a format understandable to users
- Integrated report writer capable of enabling users to produce and store high quality and visually presentable reports in a professional standard/layout as appropriate
- Staff and student / guardian portal as required by members

- Potential for supporting shared service offer for other organisations if required by members
- “Workflow” flexibilities to include but not limited to absence management procedures
- Fully compatible and automated interface with other systems as required by members, including but not limited to Finance Software
- The ability to store scanned images of prime documents, including but not limited to learner enrolment forms, medical forms, and individual student reports
- System security compliant with all current legislation and best practice including but not limited to two factor authentication, if required by members
- The security maintenance of the system must satisfy requirements including but not limited to segregation of duties, however there is a need to maintain the flexibility required in a large complex organisation such as a multi academy trusts and not be overly burdensome in its administration for academies, schools, colleges or as appropriate
- Compliance with all required law and best practice
- Flexible structure, allowing changes in organisational structures to be made easily, including but not limited to mergers of organisations
- A facility to update/upgrade, allowing the member institutions to “future-proof” the system
- Compatibility with Microsoft Office as standard to enable the uploading of data, and download and manipulate/model information

Member requirements will vary dependant from simple off the shelf software through to bespoke systems. Requirements may include both on premise, cloud or hybrid cloud software solutions including any related products (including but not limited to hardware and consumables), mobile applications, and related services.

Related services will include but are not limited to software advice and recommendations, consultancy, legal advice and compliance, advice on potential solution offerings, handover from any existing providers, implementation and commissioning, integration with other systems, a range of on-going support including helpdesk facilities both remote and onsite as required by the member, maintenance, development and innovation, de-commissioning, and handover to future providers.

## **II.2.5) Award criteria**

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

documents

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

Duration in months

48

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

48 month(s) from the commencement date, with 24 initial month(s) and option to extend 2x12 month(s)

### **II.2.13) Information about European Union Funds**

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

## **II.2) Description**

### **II.2.1) Title**

Lot 6 – Educational Management and Communications Software (excluding MIS)

Lot No

6

### **II.2.2) Additional CPV code(s)**

- 48510000 - Communication software package
- 48311100 - Document management system
- 48150000 - Industrial control software package
- 48312000 - Electronic publishing software package
- 48190000 - Educational software package
- 48310000 - Document creation software package
- 48223000 - Electronic mail software package
- 48332000 - Scheduling software package
- 48100000 - Industry specific software package
- 48311000 - Document management software package

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

Greater Manchester

### **II.2.4) Description of the procurement**

Lot 6 – Educational Management and Communications Software (excluding MIS)

This lot is for the provision of miscellaneous software systems for the provision of educational management and communication requirements including but not limited to:

Communications Software, and / or Appointment Scheduling Software and / or Events Management Software, Classroom Timetabling Software, Survey Software, Attendance Management Software, Admissions Software, Safeguarding Software, Apprenticeship Management Software, Alumni Management Software, Student Recruitment Software, Governor Software and Sector / Business Intelligence, Resource Software, and Document Management Software. Integration Systems that link MIS systems with other relevant software.

Please note this lot excludes full Management Information Systems (MIS) and is aimed at the provision for standalone software or as specified by members.

Systems including but are not limited to the following aspects of supply as required by members:

- Accurate and reliable Student data processing and reporting as appropriate
- Accurate and reliable communication tool with the ability to filter including but not limited to communication type and recipient including but not limited for postal, email and text message services
- Circulation of newsletters, electronic forms and other communications not limited to staff, students, guardians, and governors
- Accurate and reliable appointment and event management software to schedule events including but not limited to school trips, parent's evenings, school assemblies, festivals, online and phone meetings with login access by students and parents / guardians as required by the member
- Accurate and reliable survey and analysis software with the ability to filter on results or recipient type
- Potential for supporting shared service offer for other organisations if required by members
- "Workflow" flexibilities to include but not limited to absence management procedures
- Fully compatible and automated interface with other systems as required by members, including but not limited to Finance Software
- Reporting, in a format understandable to users with a simple to use integrated report writer capable of enabling users to produce and store high quality and visually presentable reports in a professional standard/layout as appropriate software dependant and as specified by members
- The ability to store scanned images of prime documents, including but not limited to learner enrolment forms, medical forms as appropriate
- System security compliant with all current legislation and best practice including but not limited to two factor authentication, if required by members
- The security maintenance of the system must satisfy requirements including but not limited to segregation of duties, however there is a need to maintain the flexibility required in a large

complex organisation such as a multi academy trusts and not be overly burdensome in its administration for academies, schools, colleges or as appropriate

- Compliance with all required law and best practice
- Flexible structure, allowing changes in organisational structures including but not limited to mergers of organisations
- A facility to update/upgrade, allowing the member institutions to “future-proof” the system
- Compatibility with Microsoft Office as standard to enable the uploading of data, and download and manipulate/model information

Member requirements will vary dependant from simple off the shelf software through to bespoke systems. Requirements may include both on premise, cloud or hybrid cloud software solutions including any related products (including but not limited to hardware and consumables), mobile applications, and related services.

Related services are also included, please see ITT for further details.

### **II.2.5) Award criteria**

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

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

Duration in months

48

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

48 month(s) from the commencement date, with 24 initial month(s) and option to extend 2x12 month(s)

### **II.2.13) Information about European Union Funds**

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

## **II.2) Description**

### **II.2.1) Title**

Lot 7 – Project Management & Resource Planning Software

Lot No

7

### **II.2.2) Additional CPV code(s)**

- 48331000 - Project management software package
- 48982000 - Configuration management software package
- 48170000 - Compliance software package
- 48190000 - Educational software package

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

Greater Manchester

### **II.2.4) Description of the procurement**



## Lot 7 – Project Management & Resource Planning Software

This lot is for the provision of Project Management Software, and Resource Planning Software Systems to support and enhance the administration and operations for members institutions.

The Software provision includes but is not limited to Project Management Software, Workflow and Resource Management Software, and Team Collaboration Software for both academic and administration use.

Systems including but are not limited to the following aspects of supply as required by members:

- Project Management Software and/or Resource Planning Software ensuring usability and accessibility is embedded within the software with the ability to work, organise and share data, documents and files as required by members
- Software to support and range of work methodologies and project types in line with best practice
- Provision for software intended for time management and identification of bottlenecks as required by members
- Effective management of workloads, assignment of projects and tasks
- Automation and template provision to enable focus of individuals and groups to drive efficiencies
- Potential for supporting shared service offer for other organisations
- “Workflow” flexibilities to include but not limited to absence management procedures
- Fully compatible and automated interface with other systems as required by members
- Reporting, in a format understandable to users with a simple to use integrated report writer capable of enabling users to produce and store high quality and visually presentable reports in a professional standard/layout as appropriate software dependant and as specified by members
- The ability to store documents including but not limited to scanned images of prime documents

- The security maintenance of the system must satisfy requirements including but not limited to segregation of duties, however there is a need to maintain the flexibility required in a large complex organisation such as a multi academy trusts and not be overly burdensome in its administration for academies, schools, colleges or as appropriate
- Compliance with all required law and best practice
- Flexible structure, allowing changes in organisational structures including but not limited to mergers of organisations
- A facility to update/upgrade, allowing the member institutions to “future-proof” the system
- Compatibility with Microsoft Office as standard to enable the uploading of data, and download and manipulate/model information

Member requirements will vary dependant from simple off the shelf software through to bespoke systems. Requirements may include both on premise, cloud or hybrid cloud software solutions including any related products (including but not limited to hardware and consumables), mobile applications, and related services.

Related services will include but are not limited to software advice and recommendations, consultancy, legal advice and compliance, advice on potential solution offerings, handover from any existing providers, implementation and commissioning, integration with other systems, a range of on-going support including helpdesk facilities both remote and onsite as required by the member, maintenance, development and innovation, de-commissioning, and handover to future providers.

### **II.2.5) Award criteria**

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

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

Duration in months

48

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

48 month(s) from the commencement date, with 24 initial month(s) and option to extend 2x12 month(s)

### **II.2.13) Information about European Union Funds**

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

## **II.2) Description**

### **II.2.1) Title**

Lot 8 – Customer Relationship Management (CRM) Systems

Lot No

8

### **II.2.2) Additional CPV code(s)**

- 48445000 - Customer Relation Management software package
- 72212445 - Customer Relation Management software development services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

Greater Manchester

## **II.2.4) Description of the procurement**

### **Lot 8 – Customer Relationship Management (CRM) Systems**

This lot is for the provision of Customer Relationship Management (CRM) Software to support and enhance the administration and operations for members institutions including but not limited to the following aspects of supply as required by members:

- CRM Software ensuring usability and accessibility is embedded within the software to streamline customer relationship processes
- Provision to organise, evaluate, and standardise workflows and processes through means of including but not limited to contract management, interaction tracking, lead management, mailing integration, document management, reporting and analytics, and forecasting
- Accurate and reliable reporting for individual business insights as required by members
- Accurate and reliable communication tool with the ability to filter including but not limited to communication type and recipient including but not limited for postal, email and text message services
- Associated modules or tools to include but not limited to apprenticeship management and alumni management
- Facility to analyse, and report, at all levels, in a format understandable to users
- Integrated report writer capable of enabling users to produce and store high quality and visually presentable reports in a professional standard/layout as appropriate
- Potential for supporting shared service offer for other organisations if required by members
- “Workflow” flexibilities to include but not limited to absence management procedures
- Fully compatible and automated interface with other systems as required by members
- The ability to store scanned images of prime documents
- System security compliant with all current legislation and best practice including but not limited to two factor authentication, if required by members
- The security maintenance of the system must satisfy requirements including but not limited to segregation of duties, however there is a need to maintain the flexibility required in a large

complex organisation such as a multi academy trusts and not be overly burdensome in its administration for academies, schools, colleges or as appropriate

- Flexible structure, allowing changes in organisational structures to be made easily, including but not limited to mergers of organisations
- A facility to update/upgrade, allowing the member institutions to “future-proof” the system
- Compatibility with Microsoft Office as standard to enable the uploading of data, and download and manipulate/model information

Member requirements will vary dependant from simple off the shelf software through to bespoke systems. Requirements may include both on premise, cloud or hybrid cloud software solutions including any related products (including but not limited to hardware and consumables), mobile applications, and related services.

Related services will include but are not limited to software advice and recommendations, consultancy, legal advice and compliance, advice on potential solution offerings, handover from any existing providers, implementation and commissioning, integration with other systems, a range of on-going support including helpdesk facilities both remote and onsite as required by the member, maintenance, development and innovation, de-commissioning, and handover to future providers.

### **II.2.5) Award criteria**

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

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

Duration in months

48

This contract is subject to renewal

No

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

48 month(s) from the commencement date, with 24 initial month(s) and option to extend 2x12 month(s)

### **II.2.13) Information about European Union Funds**

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

## **II.2) Description**

### **II.2.1) Title**

Lot 9 – Estates Management Software including CAFM Systems

Lot No

9

### **II.2.2) Additional CPV code(s)**

- 79996100 - Records management
- 72212190 - Educational software development services
- 48333000 - Contact management software package
- 48421000 - Facilities management software package
- 48430000 - Inventory management software package
- 48311000 - Document management software package
- 48170000 - Compliance software package
- 48311100 - Document management system
- 48190000 - Educational software package

- 72212170 - Compliance software development services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

Greater Manchester

### **II.2.4) Description of the procurement**

Lot 9 – Estates Management Software including CAFM Systems

This lot is for the provision of Estates Management Software to support and enhance the administration and operations for members institutions.

The Software provision includes but is not limited to full Computer Aided Facilities Management Systems (when managed by the member institution), Estates (and IT) fault reporting software and systems including ticketing and helpdesk provision as required by members.

Accommodation and Letting Bookings Software aimed at but not limited to colleges with halls of residents. Contractor / Supplier Management, Stock Control, and Asset Management Software, Risk Management Software, COSHH Management Software, Health and Safety Software, Estates Compliance Software, Building Management Software to include but not limited to control systems for temperature, lighting and energy management, Onsite Visitor and Staff / Student Management Software, Space Management and Room Booking Software and other facilities management and estates related software.

Systems including but are not limited to the following aspects of supply as required by members:

- Software provision to be used in an estate's capacity ensuring ease of use with the ability to work, organise and share data, documents and files as required by members
- Software and tools to include Computer Aided Facility Management (CAFM) software with the ability for members to plan, execute and monitor all activities involved in reactive and planned preventative maintenance, space and move management, asset management, operational facility services, room reservations and other customer services. This is aimed at where members will be managing their facility management requirements internally and not

outsourcing this requirement. \*

- Other Estates software and tools for standalone requirements or as specified by members including but not limited to Estates (and IT, where provided as part of an estates requirement) fault reporting software and systems including ticketing and helpdesk provision as required by members. Accommodation Software aimed at but not limited to colleges with halls of residents. Contractor / Supplier Management, Asset Management Software, Risk Management Software, COSHH Management Software, Health and Safety Software, Estates Compliance Software, Building Management Software to include but not limited to control systems for temperature, lighting and energy management, Onsite Visitor and Staff / Student Management Software, Space Management and Room Booking Software
- Software to support and range of work methodologies and project types in line with best practice
- Provision for software intended for time management and identification of bottlenecks as required by members
- Effective management of workloads, assignment of projects and tasks
- Automation and template provision to enable focus of individuals and groups to drive efficiencies
- Potential for supporting shared service offer for other organisations if required by members
- “Workflow” flexibilities to include but not limited to absence management procedures
- Fully compatible and automated interface with other systems as required by members
- Reporting, in a format understandable to users with a simple to use integrated report writer capable of enabling users to produce and store high quality and visually presentable reports in a professional standard/layout as appropriate software dependant and as specified by members
- The ability to store documents including but not limited to scanned images of prime documents
- The security maintenance of the system must satisfy requirements including but not limited to segregation of duties, however there is a need to maintain the flexibility required in a large complex organisation such as a multi academy trusts and not be overly burdensome in its administration for academies, schools, colleges or as appropriate

Further further details please see the ITT.



## **II.2.5) Award criteria**

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

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

Duration in months

48

This contract is subject to renewal

No

## **II.2.10) Information about variants**

Variants will be accepted: No

## **II.2.11) Information about options**

Options: Yes

Description of options

48 month(s) from the commencement date, with 24 initial month(s) and option to extend 2x12 month(s)

## **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

See ITT for details

#### **III.1.2) Economic and financial standing**

List and brief description of selection criteria

See ITT for details

Minimum level(s) of standards possibly required

See ITT for details

#### **III.1.3) Technical and professional ability**

List and brief description of selection criteria

See ITT for details

Minimum level(s) of standards possibly required

See ITT for details

### **III.2) Conditions related to the contract**

#### **III.2.2) Contract performance conditions**

See ITT for details

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## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Open procedure

#### **IV.1.3) Information about a framework agreement or a dynamic purchasing system**

The procurement involves the establishment of a framework agreement

Framework agreement with several operators

Envisaged maximum number of participants to the framework agreement: 110

#### **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.2.1) Previous publication concerning this procedure**

Notice number: [2021/S 000-016450](#)

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

Date

14 March 2022

Local time

1:00pm

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

English

#### **IV.2.7) Conditions for opening of tenders**

Date

14 March 2022

Local time

1:00pm

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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**

Crescent Purchasing Consortia

Procurement House

Salford

M6 6AJ

Country

United Kingdom

#### **VI.4.2) Body responsible for mediation procedures**

Crescent Purchasing Consortia

Procurement House

Salford

M6 6AJ

Country

United Kingdom

### **VI.4.3) Review procedure**

Precise information on deadline(s) for review procedures

The Contracting Authority will incorporate a minimum of a ten calendar day standstill period at the point that information on the award of contract is communicated to tenderers. If an appeal regarding the award of contract has not been successfully resolved then the Public Contract Regulations 2015, provide for aggrieved parties who have been harmed or are at risk of harm, by breach of the rules to take action in the High Court. Any such action must be brought promptly