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Tender

Investment Manager Services

University of York

F02: Contract notice

Notice identifier: 2022/S 000-005072

Procurement identifier (OCID): ocds-h6vhtk-031a6c

Published 23 February 2022, 2:51pm

Section I: Contracting authority

I.1) Name and addresses

University of York

Heslington

York

YO10 5DD

Contact

Procurement Office

Email

donna.lyon@york.ac.uk

Telephone

+44 1904328207

Country

United Kingdom

NUTS code

UKE21 - York

Internet address(es)

Main address

www.york.ac.uk

I.3) Communication

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

<https://in-tendhost.co.uk/york.aspx/Home>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://in-tendhost.co.uk/york.aspx/Home>

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

Electronic communication requires the use of tools and devices that are not generally available. Unrestricted and full direct access to these tools and devices is possible, free of charge, at

<https://in-tendhost.co.uk/york.aspx/Home>

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Education

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Investment Manager Services

Reference number

UY/PROC/844

II.1.2) Main CPV code

- 66120000 - Investment banking services and related services

II.1.3) Type of contract

Services

II.1.4) Short description

The University of York is pleased to invite tenders from FCA authorised firms for the provision of discretionary investment management services for an initial contract term of 5 years. The University's investment portfolio currently contains permanent endowment assets valued at approximately £7.3m. The services we require as a minimum are: - Suitable investment strategy and allocation advice- Portfolio management and reporting- Account management and market insightFurther details can be found in the invitation to tender documents.

II.1.5) Estimated total value

Value excluding VAT: £200,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.3) Place of performance

NUTS codes

- UKE21 - York

II.2.4) Description of the procurement

As stated in II.1.4

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

60

This contract is subject to renewal

Yes

Description of renewals

As stated in the Invitation to Tender document.

II.2.10) Information about variants

Variants will be accepted: No

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

Potential providers must be authorised and regulated by the Financial Conduct Authority (FCA).

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

III.2) Conditions related to the contract

III.2.1) Information about a particular profession

Execution of the service is reserved to a particular profession

Reference to the relevant law, regulation or administrative provision

Potential providers must be authorised and regulated by the Financial Conduct Authority (FCA).

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

25 March 2022

Local time

12:00pm

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

English

IV.2.6) Minimum time frame during which the tenderer must maintain the tender

Duration in months: 3 (from the date stated for receipt of tender)

IV.2.7) Conditions for opening of tenders

Date

25 March 2022

Local time

12:01pm

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: Yes

VI.3) Additional information

The University will use their eTendering system in this procurement exercise. Prospective suppliers should first register on the In-Tend system at <https://in-tendhost.co.uk/york/>. Once registered you will receive your login details and you will then be able to find the tender documentation by logging into the In-Tend portal and clicking on the Current Tenders link.

VI.4) Procedures for review

VI.4.1) Review body

University of York

York

Country

United Kingdom

VI.4.3) Review procedure

Precise information on deadline(s) for review procedures

The University will incorporate a minimum 10 calendar day standstill period at the point information on the award of the contract is communicated to tenderers. This period allows unsuccessful tenderers to seek further debriefing from the University's Procurement Office in the first instance, before the contract is entered into.