

This is a published notice on the Find a Tender service: <https://www.find-tender.service.gov.uk/Notice/005072-2022>

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](mailto:donna.lyon@york.ac.uk)

#### **Telephone**

+44 1904328207

#### **Country**

United Kingdom

**NUTS code**

UKE21 - York

**Internet address(es)**

Main address

[www.york.ac.uk](http://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 insight Further 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.