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Tender

## **Multi Lot: School Resource Management Advisers, Accreditation and Chief Financial Officer Mentoring procurements**

Department for Education

F02: Contract notice

Notice identifier: 2021/S 000-006302

Procurement identifier (OCID): ocds-h6vhtk-029be3

Published 26 March 2021, 10:56pm

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

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

Department for Education

Sanctuary Buildings, 20, Great Smith Street

London

SW1P 3BT

#### **Email**

[Emma.REDFERN-ROBINSON@education.gov.uk](mailto:Emma.REDFERN-ROBINSON@education.gov.uk)

#### **Telephone**

+44 00000000

#### **Country**

United Kingdom

**NUTS code**

UK - UNITED KINGDOM

**Internet address(es)**

Main address

[www.gov.uk](http://www.gov.uk)

**I.3) Communication**

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

<https://education.app.jaggaer.com>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://education.app.jaggaer.com>

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

**I.4) Type of the contracting authority**

Ministry or any other national or federal authority

**I.5) Main activity**

Education

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**Section II: Object**

**II.1) Scope of the procurement**

**II.1.1) Title**

Multi Lot: School Resource Management Advisers, Accreditation and Chief Financial Officer Mentoring procurements

**II.1.2) Main CPV code**

- 80000000 - Education and training services

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

Services

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

School Resource Management Advisers Programme

Since 2017 ESFA has developed the role of School Resource Management Advisers (SRMAs) to provide direct support to academy trusts and local authorities to help them identify opportunities to improve their approach to resource management. This is part of ESFA's overarching objective to help improve outcomes for pupils by schools getting the best value from their resources.

SRMAs are sector experts, such as practicing school business professionals or head teachers with specific expert knowledge in resource management. Each SRMA has to go through an accreditation process to ensure they have the appropriate skills and knowledge to carry out the role. ESFA currently has contracts in place for the accreditation and supply of SRMAs through to August 2021.

Due to the success of the programme to date, we are looking to ensure the continued supply of SRMAs though to August 2024. ESFA wishes to contract with up to four organisations for the supply of a minimum of 50 Accredited Persons, to deliver a total of 200 Accredited Persons across the framework per year over the next three years. This will involve both the continued supply of SRMAs already accredited and the recruitment and training of new SRMAs to support the programme. The contracts will commence in September 2021 once the current contracts have ended.

The second procurement opportunity seeks one organisation to develop and deliver a consistent induction service and a robust accreditation process for all SRMA candidates that are sourced by the sourcing supplier(s). This will build on the process already developed with the current contractor and will also involve the development of a new training element for SRMA candidates. This contract will also commence on 1 July 2021.

Chief Finance Officer Mentoring Pilot

In addition to the above, we now wish to complement this programme with a Chief Finance Officer (CFO) mentoring pilot by providing longer term support to academy trust CFOs working in some of the most challenging situations; those in trusts in intervention or with some financial difficulties, those in trusts that are growing and those that are new to the sector. The duration for this contract will be 14 months, from 1 July 2021.

ESFA will work with a Supplier who will identify, recruit, screen, induct and manage a minimum of 50 individuals (mentors) to fulfil the CFO mentoring programme. The supplier will oversee the mentoring process, ensuring the relationships are on target and will work with ESFA to unblock any issues. The Supplier will also lead on developing an evaluation for the pilot, working closely with ESFA to agree the best way to do this.

By providing sustained support, a CFO mentoring programme can play a key role in building capacity and capability for effective financial management within the academies sector. Results from this pilot will provide an indication of emerging outcomes and the effectiveness of the programme and will inform any decision as to whether we will scale up the pilot in the future.

### **II.1.5) Estimated total value**

Value excluding VAT: £6,800,000

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

This contract is divided into lots: Yes

Tenders may be submitted for all lots

Maximum number of lots that may be awarded to one tenderer: 3

## **II.2) Description**

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

Chief Finance Officer Mentoring Pilot

Lot No

1

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

- 80000000 - Education and training services

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

NUTS codes

- UK - UNITED KINGDOM

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

1) In the 2017/18 academic year, ESFA piloted the use of School Resource Management Advisers (SRMAs). SRMAs have become a core strand of the wider School Resource Management portfolio supporting DfE's overarching objective to help schools improve outcomes for pupils and promote social mobility by getting the best value from all their resources. The SRMA programme has supported this strategy by developing capacity within schools through providing them with a sector expert to help identify opportunities to improve the management of their resources. The SRMA programme has been hugely successful to date and we now wish to complement this with a Chief Finance Officer (CFO) mentoring programme.

2) SRMAs provide short term (5 to 10 days) support to trusts and local authorities to help them make best use of their budgets. A CFO mentoring programme would complement the SRMA programme by providing longer term support to academy trust CFOs working in the most challenging situations; those in trusts in intervention, those in trusts that are growing and those that are new to the sector.

3) A strong system of financial management and control, driven by the CFO, is essential in ensuring good financial health in any academy trust. We know that new CFOs or those working in trusts in financial difficulty face particular challenges and a mentor can support these leaders as they set up systems or bring about better financial performance within their trust.

4) A CFO mentoring pilot would help us accurately determine how mentoring can support and develop academy trust CFOs and explore the value of launching a substantive scheme for the 2022/23 academic year.

5) ESFA would like to prioritise participants as mentees who fall into the following categories:

i. CFOs of those trusts that have been identified as being in financial difficulty or not following administration/procedures associated with good financial governance, for example trusts that appear on the list of published late financial returners for the last two consecutive years; and

ii. CFOs who are new to post and/or inexperienced in the academies sector.

#### **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: £132,000

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

Duration in months

14

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: 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

## **II.2) Description**

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

Supply of SRMAs

Lot No

2

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

- 80000000 - Education and training services

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

NUTS codes

- UK - UNITED KINGDOM

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

1. The role of the Accredited Person will be to support academy trusts and local authority maintained schools who have come to the ESFA's attention as requiring support to improve their financial health. Accredited Persons will take a holistic view of the school's/trust's financial situation, including consideration of the following issues:

1.1 Human resources: Effective curriculum delivery, workforce planning and wider use of staff and leadership time through the use of Integrated Curriculum and Financial Planning (ICFP);

1.2 School management and governance: financial management and challenge across the senior leadership team and board of governors;

1.3 Resources: Procurement (including, for example, consideration of National Deals, schools' buying strategies etc.), value for money, capital finance and estate management.

2. Accredited Persons will support effective resource management by providing independent and impartial advice to schools and trusts on how to maximise resources in order to maintain and improve educational outcomes for all pupils, including those with SEN. Accredited Persons should take into account the nature of the school, i.e. whether it is academy or maintained, MAT or SAT, mainstream, special or Alternative Provision, primary or secondary, and whether it is a faith school.

3. In the most serious cases, an Accredited Person shall be required to support a school or trust to develop a viable budget plan by examining its financial planning and proposed spending plans. As part of this, the Accredited Person will be expected to consider whether the trust or school uses an ICFP approach and, if so, how this is carried out. This includes identifying whether it uses ICFP diagnostic tools and models and how.

4. In cases where the school or trust is in a less serious financial position or already in good financial health, the Accredited Person shall be required to make recommendations on how the school or trust can further improve its approach to financial management to ensure every possible resource is being directed to the areas that have greatest impact on educational outcomes. Again, a part of this will be determined by the school or trust's approach to ICFP.

5. Where the trust or school does take an ICFP approach, the Accredited Person shall work through the key metrics to identify options that could potentially deliver improvements in the way staff are deployed. Where the trust or school does not, the Accredited Persons shall help it introduce ICFP into its planning processes as well as suggesting other options for improvements.

6. In most instances, Accredited Persons will be expected to carry out a 'follow-up'

deployment to the same setting at least six months after report submission. The purpose of this deployment will be to check on progress against the recommendations.

7. All Accredited Persons must carry out a minimum of two deployments per year (from the date of their accreditation) to maintain their accredited status.

#### **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: £6,435,000

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

Duration in months

36

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: 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

#### **II.2.14) Additional information**

The budget for lot 2 is split between

c. £915,000 for the supplier contracts

c. £5,520,000 for SRMA deployments

## **II.2) Description**

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

Accreditation of SRMAs

Lot No

3

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

- 80000000 - Education and training services

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

NUTS codes

- UK - UNITED KINGDOM

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

1. ESFA currently has contracts in place for the accreditation and supply of SRMAs through to August 2021. Due to the success of the programme to date, we are looking to contract with one organisation for the development and delivery of induction and accreditation panels and complementary training.
2. SRMAs were introduced in 2017 to provide direct support to academy trusts and local authorities to identify opportunities to improve resource management. This is part of ESFA's overarching objective to help improve outcomes for pupils by schools getting the best value from all of their resources.
3. In higher risk cases, SRMAs provide advice and support to address current or future forecast deficits and in all cases they help trusts and schools identify opportunities to make better use of their funding, enabling them to target resources where they have the most impact on outcomes for children.
4. Prior to deployment, all Accredited Persons will have participated in an induction and successfully completed an accreditation process led by an independent Accreditation Body. Persons who were accredited before 31 August 2021 will automatically become Accredited Persons for the purposes of this Contract and will not need further accreditation, assuming they are still currently active SRMAs and have fulfilled the criteria set by ESFA to maintain their accredited status. Accreditation will provide assurance to ESFA that the Accredited Person can use the findings of their deployment (including analysis and discussions with trust/school leaders) to develop appropriate recommendations, with costed savings, for the trust/school to take to improve their

approach to resource management.

5. Specific requirements of the role are set out in the ITT. All Potential Providers must describe how they will deliver against each requirement.

#### **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: £282,000

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

Duration in months

36

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: 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 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.2.1) Previous publication concerning this procedure**

Notice number: [2021/S 000-005234](#)

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

Date

3 May 2021

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

English

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

Date

3 May 2021

Local time

12:00pm

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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**

Education & Skills Funding Agency

Coventry

Country

United Kingdom