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Tender

## **ACE - Provision of Financial Management System**

Academies for Character & Excellence

UK4: Tender notice - Procurement Act 2023 - [view information about notice types](#)

Notice identifier: 2026/S 000-014023

Procurement identifier (OCID): ocids-h6vhtk-06093e ([view related notices](#))

Published 16 February 2026, 4:52pm

### **Scope**

### **Reference**

ACE01.76

### **Description**

This tender opportunity has been issued by Academies for Character and Excellence (“the Trust”) and Tenderers are invited to tender for the provision of Financial Management System. Full details of all contract requirements are given in this document - Document 2. Specification of Requirement. The Trust comprises multiple academies operating under a unified governance structure and financial framework. To support effective financial oversight and ensure regulatory compliance, the Trust requires a fully integrated Finance System. The system must enable compliant financial management in accordance with the Academies Trust Handbook (ATH), all ESFA reporting obligations, and the Trust’s Finance Policy.

### **Total value (estimated)**

- £250,000 excluding VAT
- £300,000 including VAT

Above the relevant threshold

### **Contract dates (estimated)**

- 1 September 2026 to 31 August 2030
- Possible extension to 31 August 2032
- 6 years

Description of possible extension:

4 year term with the option of two further 1 year extensions (4+1+1)

### **Options**

The right to additional purchases while the contract is valid.

To enable further schools to be added to the contract as they join the Trust and to enable additional modules or services in relation to the software.

### **Main procurement category**

Goods

### **Additional procurement category**

Services

## CPV classifications

- 48440000 - Financial analysis and accounting software package
- 48000000 - Software package and information systems

## Contract locations

- UKK - South West (England)

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## Participation

### Legal and financial capacity conditions of participation

Financial Capacity Assessment: Bidders must demonstrate that their financial position is sufficiently robust to support both the implementation and ongoing delivery of the Finance System. Bidders must provide their audited financial statements for the previous two financial years. Where audited accounts are not available, bidders should provide certified accounts or equivalent financial information. Bidders should disclose any known events that may materially impact their financial position during the contract term (for example, planned sale, refinancing, or restructuring). Minimum Turnover Requirement The bidder's annual turnover must be at least two times the estimated annual contract value. Net Asset Position Bidders must demonstrate a positive net asset position in their most recent financial statements Liquidity and Access to Financial Resources Bidders must demonstrate access to adequate financial resources to support ongoing business operations and contractual commitments. Revenue Model Stability Bidders must describe their revenue model, including the proportion of income that is recurring, contractually committed, or otherwise predictable. The Trust will assess the economic and financial standing of bidders to ensure that the successful supplier has the financial capacity and resilience required to deliver the contract for its full duration. The Trust is seeking a financially resilient supplier capable of sustaining long-term service delivery. The assessment is designed to ensure resilience rather than favour organisations of a particular size. The assessment will be conducted in accordance with the principles of proportionality, transparency, and equal treatment. Insurance requirements - can commit to obtain, prior to the award of the contract, the levels of insurance cover indicated below

- a. Employer's (Compulsory) Liability Insurance\* = £5m
- b. Public Liability Insurance = £5m
- c. Professional Indemnity Insurance = £1m
- d. Product Liability Insurance = £1m
- e. Cyber

and Data Protection Insurance = £1m

## **Technical ability conditions of participation**

Relevant experience and contract examples Please provide details of up to three contracts to meet conditions of participation relating to technical ability set out in the relevant notice or procurement documents, in any combination from either the public or private sectors (which may include samples of grant-funded work). The examples must be from the past three years. To constitute a pass, the minimum of two contract examples provided shall be relevant to the complexity of the requirement, with a sufficient level of detail that provides confidence in the Tenderer's established past experience in similar and relevant projects/contracts.

Organisational Standards Please provide details of the organisational standards and certifications your organisation holds that are relevant to the delivery of this contract, including (but not limited to) Quality Management and Information Security standards such as ISO 9001 and ISO 27001, or equivalent internationally recognised certifications. You must confirm that the scope of these certifications explicitly covers the services proposed within this procurement. Where equivalent standards are offered, please explain how they meet or exceed the requirements of the specified ISO standards. Bidders must submit the following evidence:

- Copies of current certification issued by an accredited certification body.
- A copy of the certification scope statement demonstrating that the services being procured fall within the accredited scope.
- Confirmation of certification validity dates.
- Details of any non-conformities identified during the most recent audit and the corrective actions taken.

## **Particular suitability**

Small and medium-sized enterprises (SME)

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## **Submission**

### **Enquiry deadline**

13 March 2026, 12:00pm

### **Tender submission deadline**

23 March 2026, 12:00pm

### **Submission address and any special instructions**

[https://uk.eu-supply.com/app/rfq/rwlenrance\\_s.asp?PID=102458&TID100107674&B=](https://uk.eu-supply.com/app/rfq/rwlenrance_s.asp?PID=102458&TID100107674&B=)

### **Tenders may be submitted electronically**

Yes

### **Languages that may be used for submission**

English

### **Award decision date (estimated)**

11 May 2026

### **Recurring procurement**

Publication date of next tender notice (estimated): 5 January 2032

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### **Award criteria**

<b>Name</b>	<b>Description</b>	<b>Type</b>	<b>Weighting</b>
Software Functionality	Importance of Requirement: High = 25% Medium = 10% Low = 5%	Quality	40%
Price	Whole life contract cost	Cost	35%
Quality of People & Support Team		Quality	5.5%
Implementation & Transition Delivery		Quality	5%
Customer Retention & Client Success		Quality	4.5%
Service Support Model & Responsiveness		Quality	3%
Contract Management & Strategic Partnership		Quality	2%
Service Performance Monitoring & Continuous Improvement		Quality	2%
Innovation, Product Roadmap & Future Fit		Quality	1.5%
Complaint Resolution & Escalation		Quality	1.5%

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## Other information

### Payment terms

41. The Trust requires the following payment profile: a. Implementation Costs i. 25% invoiced upon Contract Signature ii. 25% invoiced upon completion of the build iii. 25% following completion of testing iv. 25% following go live plus 1 month b. Table B All Inclusive Cost i. Quarterly invoicing, 1st Invoice 2 months in Arrears following Go Live. Where it has been identified, and agreed, that adjustments are required (in respect of service credits, additional works, errors or omissions), these will be taken account of within the next invoice.

## Description of risks to contract performance

Key risks in finance system contracts for schools: Financial risks: Higher-than-expected costs, hidden charges, poor value for money. Contract risks: Long, inflexible contracts, high exit fees, supplier lock-in. Data & cyber risks: GDPR breaches, weak security, system outages. Operational risks: System downtime, poor usability, inadequate support and training. Compliance risks: Failure to meet DfE/LA requirements, weak audit trails. Implementation risks: Poor data migration, ineffective change management. Fraud & control risks: Weak approval controls, segregation of duties, payment errors. Strategic risks: Supplier failure, system becoming outdated or unsupported. Overall impact: Financial loss, non-compliance, operational disruption, and reputational damage.

## Applicable trade agreements

- Government Procurement Agreement (GPA)

## Conflicts assessment prepared/revised

Yes

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## Procedure

### Procedure type

Open procedure

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## Contracting authority

## **Academies for Character & Excellence**

- Public Procurement Organisation Number: PYNM-4868-XBBN

Pathfields

Totnes

TQ9 5TZ

United Kingdom

Contact name: Laurence Evans

Email: [laurence.evans@acexcellence.org.uk](mailto:laurence.evans@acexcellence.org.uk)

Region: UKK43 - Devon CC

Organisation type: Public authority - sub-central government

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## **Other organisation**

These organisations are carrying out the procurement, or part of it, on behalf of the contracting authorities.

### **PHP Law LLP**

Summary of their role in this procurement: Supporting Tender process

- Public Procurement Organisation Number: PPRM-9434-VNYQ

Unit 3 The Brutus Centre Station Road Totnes

Totnes

TQ9 5TZ

United Kingdom

Contact name: Claire Jones

Email: [claire.jones@phplaw.co.uk](mailto:claire.jones@phplaw.co.uk)

Region: UKK43 - Devon CC

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## Contact organisation

Contact [PHP Law LLP](#) for any enquiries.