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Tender

## **The Provision of a Fundraising and Alumni Customer Relationship Management (CRM) Solution**

UNIVERSITY OF SOUTHAMPTON

F02: Contract notice

Notice identifier: 2021/S 000-017169

Procurement identifier (OCID): ocds-h6vhtk-02ca7f

Published 21 July 2021, 11:53am

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

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

UNIVERSITY OF SOUTHAMPTON

HIGHFIELD CAMPUS, UNIVERSITY ROAD

SOUTHAMPTON

SO171BJ

#### **Email**

[e.raddon@soton.ac.uk](mailto:e.raddon@soton.ac.uk)

#### **Country**

United Kingdom

#### **NUTS code**

UKJ32 - Southampton

## **Internet address(es)**

Main address

<https://www.southampton.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/universityofsouthampton>

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/universityofsouthampton>

## **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**

The Provision of a Fundraising and Alumni Customer Relationship Management (CRM) Solution

Reference number

2021UoS - 0340

#### **II.1.2) Main CPV code**

- 48445000 - Customer Relation Management software package

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

Supplies

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

The University of Southampton seeks to procure a Fundraising and Alumni CRM solution to support The Campaign for Southampton which will see an ambitious increase in all elements of fundraising and engagement - doubling transaction levels, significantly increasing engagement and volunteering and doubling the size of the team.

The success of a fundraising campaign is hugely dependent on a sophisticated CRM - to capture data preferences, offer improved international fundraising, and high value, multi-channel mass fundraising, and ensure enhanced major gift and volunteer management tools - to deliver the scale of fundraising and engagement required to compete in an increasingly sophisticated global charity market. This project seeks to deliver a new solution to meet these objectives.

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

Value excluding VAT: £2,000,000

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

This contract is divided into lots: No

## **II.2) Description**

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

- 48000000 - Software package and information systems
- 72212445 - Customer Relation Management software development services

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

NUTS codes

- UKJ32 - Southampton

Main site or place of performance

Southampton, Hampshire, UK

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

The University is seeking a Fundraising and Alumni CRM solution which enables fundraising, prospect research, communication, events, volunteering, reporting and data selection to harness the collective power of the alumni and supporter community to support the University's strategic objectives through philanthropy and engagement.

The University is seeking a system to support in the following areas:

Communications and Marketing

Events

Volunteering

Fundraising (Regular Giving)

Prospect Research and Management

Memberships

Legacy

Online Portal

Operations

Income Processing, including Gift Aid, DD management, Pledges, Fundspending

Reporting and Dashboards

System Admin

Of particular importance to the University is for the solution to have:

The ability to process UK gifts including direct debits and gift aid declarations and claims

The ability to manage constituent relationships or create activity based upon segments of constituents

The ability to search, query and locate a variety of record types based upon various searchable fields within the database

The ability to manage events

The ability to manage marketing automations, communications and e-communications

The ability to import to, export from or report on any field within the database

Procurement Process

This procurement process is being conducted as an Open procedure

Contract Period:

The University proposes to enter into a Contract for ten years - this will be the maximum contract period, including any potential extensions with the successful tenderer(s).

This will comprise of an initial contract period of five years with an option to extend by a further five years subject to satisfactory performance and at the sole discretion of the University.

Contract Value:

The estimated value of the initial five year contract term is in the region of £800,000 - £1,200,000 GBP (excluding VAT).

The estimated value of the five year extension period is £600,000 - £800,000 GBP (excluding VAT).

It is estimated, therefore, that the total value of this contract will be between £1,400,000

and £2,000,000 GBP (excluding VAT).

### **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: £2,000,000

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

Duration in months

120

This contract is subject to renewal

Yes

Description of renewals

This contract is likely to be subject to renewal towards the end of this contract period.

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

Variants will be accepted: No

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

Options: No

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

Lots: This contract is NOT suitable for splitting into lots. The risk of dividing the requirement into Lots would render the execution of the contract excessively technically difficult, not cost effective and would undermine proper execution of the contract.

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## **Section III. Legal, economic, financial and technical information**

### **III.1) Conditions for participation**

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

Selection criteria as stated in the procurement documents

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

List and brief description of selection criteria

To support the financial assessment, the University will obtain a Business Risk Report for all Potential Suppliers/Tenderers and every organisation that is being relied on to meet this procurement, using an independent company called Creditsafe.

The University reserves the right to exclude a Tenderer or request provision of further assurances such as parent company/bank guarantee or performance bonds where a Tenderer's Business Risk Score is: "Moderate Risk"; "High Risk"; "Very High Risk"; or "Not Rated", based on the rating provided by Creditsafe

Where a Business Risk Score from our external system is not available, then an alternative method of assessing financial standing will be used. This method is detailed within the Invitation to Tender document set.

Minimum level(s) of standards possibly required

Potential suppliers/Tenderers are advised that a requirement of this procurement is to have in place, or commit to obtain prior to the commencement of the contract, the following minimum insurance levels:

Employers (Compulsory) Liability: £10 million GBP per occurrence.

Public Liability: £5 million GBP per occurrence.

Product Liability: £5 million GBP per occurrence and in aggregate

Professional Indemnity Insurance: £10 million GBP per occurrence.

Cyber Indemnity Insurance: £10 million GBP per occurrence

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## **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

3 September 2021

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: 6 (from the date stated for receipt of tender)

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

Date

3 September 2021

Local time

12:01pm



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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: This is likely to be re-procured in 2031.

### **VI.2) Information about electronic workflows**

Electronic ordering will be used

Electronic payment will be used

### **VI.3) Additional information**

For the avoidance of doubt the budget is to cover all aspects of the delivery of the project including the design, initial installation, software licences (including those of third party products forming part of any bid package), consultancy, all expenses, training and the annual support maintenance charges, hosting, upgrades, patches and fixes throughout the contract term (including any potential extension period).

E-Tendering Portal: The University is utilising an electronic tendering tool, In-Tend (<https://intendhost.co.uk/> universityofsouthampton) to manage this procurement and to communicate with potential suppliers and/or tenderers (as appropriate).

All documentation in relation to this tender can be downloaded from In-Tend.

Potential suppliers/tenderers are advised that there will be no hard copy documents issued and all communications with the University, including the submission of Selection Stage and/or Invitation to Tender responses will be conducted via In-Tend.

Regular monitoring of the portal is the responsibility of the potential supplier/tenderer.

If you are not already registered as a supplier with the University of Southampton, you will need to register in In-Tend in order to access the procurement documentation.

Once you have logged in as a supplier: click on 'Tenders'; locate the relevant project; and click 'View Details'. Once you are in the project screen, you will be able to register your organisation against the project and access all documentation by clicking 'Express Interest'.

Potential suppliers/tenderers are advised that formal expressions of interest in the project must be by way of completion and return of the relevant documents via In-Tend.

Further instructions for the submission of responses are below:

To submit your return:

1. Log in
2. Click 'Tenders'
3. Locate the relevant project
4. View details
5. Click on the tab relating to the relevant project stage (e.g. 'Invitation to Tender')
6. Click on the 'Attach Documents' button and upload your return.
7. Check ALL your response documents are uploaded and displayed in the 'My Tender Return' panel. The system will only permit your organisation to make one return.
8. Click the red 'Submit Return' button.

Please note, to preserve the integrity of the procurement, all communications with the University must be made via the correspondence function within In-Tend.

Publication of Award Details: In accordance with Regulation 50, paragraph (2) of the Public Contracts Regulations 2015 and subject to Article 5 and Annex 5, Part D (13) of Directive 2014/24/EU of the European Parliament and of the Council (if applicable), the University intends to publish the value of any resulting contract at the award stage, and reserves the right to do so. By submitting a response, potential suppliers/tenderers are consenting to publication of this information unless otherwise agreed in advance with the University.

Costs and Expenses: Potential suppliers/tenderers are solely responsible for their costs and expenses incurred in connection with the preparation and submission of responses and participation in this and all future stages of this procurement. Under no circumstances will the University be liable for any costs or expenses borne by potential suppliers/tenderers or any of their supply chain, partners or advisers in this procurement process.

The University is not liable for any costs in the event of the cancellation of this procurement process.

## **VI.4) Procedures for review**

### **VI.4.1) Review body**

University of Southampton

Southampton

Country

United Kingdom