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Contract

## **Financial Services Framework**

Crescent Purchasing Consortium (CPC)

Dukefield Procurement Limited

Public Sector

Education

F03: Contract award notice

Notice identifier: 2021/S 000-018900

Procurement identifier (OCID): ocds-h6vhtk-0299ee

Published 5 August 2021, 2:06pm

## **Section I: Contracting authority**

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

Crescent Purchasing Consortium (CPC)

Procurement House, Leslie Hough Way

Salford

M6 6AJ

#### **Email**

[helpdesk@thecpc.ac.uk](mailto:helpdesk@thecpc.ac.uk)

#### **Telephone**

+44 8000662188

#### **Fax**

+44 1612955599

**Country**

United Kingdom

**NUTS code**

UKD3 - Greater Manchester

**Internet address(es)**

Main address

[www.thecpc.ac.uk](http://www.thecpc.ac.uk)

Buyer's address

[www.thecpc.ac.uk](http://www.thecpc.ac.uk)

**I.1) Name and addresses**

Dukefield Procurement Limited

Parkside House 167, Chorley

Bolton

BL1 4RA

**Email**

[steve.davies@dukefieldprocurement.co.uk](mailto:steve.davies@dukefieldprocurement.co.uk)

**Telephone**

+44 7966040564

**Country**

United Kingdom

**NUTS code**

UKD3 - Greater Manchester

**Internet address(es)**

Main address

<http://www.dukefieldprocurement.co.uk>

Buyer's address

<http://www.dukefieldprocurement.co.uk>

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

Public Sector

Procurement House , Unit 23 Leslie Hough Way

Manchester

M6 6AJ

### **Email**

[helpdesk@thecpc.ac.uk](mailto:helpdesk@thecpc.ac.uk)

### **Telephone**

+44 7966040564

### **Country**

United Kingdom

### **NUTS code**

UK - United Kingdom

### **Internet address(es)**

Main address

[www.thecpc.ac.uk](http://www.thecpc.ac.uk)

Buyer's address

[www.thecpc.ac.uk](http://www.thecpc.ac.uk)

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

Education

Procurement House, Unit 23 Leslie Hough Way

Salford

M6 6AJ

**Email**

[helpdesk@thecpc.ac.uk](mailto:helpdesk@thecpc.ac.uk)

**Telephone**

+44 7966040564

**Country**

United Kingdom

**NUTS code**

UK - United Kingdom

**Internet address(es)**

Main address

[www.thecpc.ac.uk](http://www.thecpc.ac.uk)

Buyer's address

[www.thecpc.ac.uk](http://www.thecpc.ac.uk)

**I.2) Information about joint procurement**

The contract involves joint procurement

**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

Financial Services Framework

Reference number

CA8423 - CPC/DU/FIN/01

#### II.1.2) Main CPV code

- 66000000 - Financial and insurance services

#### II.1.3) Type of contract

Services

#### II.1.4) Short description

The Framework will provide access to a comprehensive range of Financial Services. It is being established to meet the needs of Crescent Purchasing Consortium Members, <http://www.thecpc.ac.uk/members/regions.php> and potential members at <https://www.get-information-schools.service.gov.uk/>. It is also open for use by all contracting authorities across the UK public sector (and any future successors to these organisations). These include (but not limited to) central government departments and agencies, Non Departmental Public Bodies, NHS bodies, Local Authorities, Police Authorities, Emergency Services, Educational Establishments, Hospices, Registered Charities, National Parks and Registered Social Landlords. Full details of the classification of eligible end user establishments and geographical areas is available at <http://www.dukefieldprocurement.co.uk/ojeu>

The Framework will be let across three Lots. There will be a maximum of 6 suppliers awarded a place on each of the three Lots.

#### II.1.6) Information about lots

This contract is divided into lots: Yes

### **II.1.7) Total value of the procurement (excluding VAT)**

Value excluding VAT: £45,000,000

## **II.2) Description**

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

Lot 1 - Financial Services for Maintained Schools

Lot No

1

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

- 66171000 - Financial consultancy services
- 48442000 - Financial systems software package
- 80500000 - Training services
- 79412000 - Financial management consultancy services
- 48812000 - Financial information systems
- 48440000 - Financial analysis and accounting software package

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

NUTS codes

- UK - United Kingdom

Main site or place of performance

UK

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

This lot is designed to provide financial services to maintained school. A comprehensive suite of services will be available, including but not limited to, the following:

Strategic financial management planning and support, financial systems and accounting, financial governance, business continuity, financial training services and ad hoc consultancy services

There will be a maximum of 6 suppliers awarded a place on this framework Lot.

### **II.2.5) Award criteria**

Quality criterion - Name: Quality / Weighting: 60.00%

Price - Weighting: 40.00%

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

Options: Yes

Description of options

48 month(s) from the commencement date, with 36 initial month(s) and option to extend 1x12 month(s)

### **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**

Lot 2 - Financial Services for Academies and Multi Academy Trusts

Lot No

2

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

- 48812000 - Financial information systems
- 48442000 - Financial systems software package
- 66171000 - Financial consultancy services
- 48440000 - Financial analysis and accounting software package
- 80500000 - Training services

- 79412000 - Financial management consultancy services

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

NUTS codes

- UK - United Kingdom

Main site or place of performance

UK

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

This lot is designed to provide financial services to existing academies and multi academy trusts and those converting to academy status. A comprehensive suite of services will be available, including but not limited to, the following:

Strategic financial management planning and support, financial systems and accounting, financial governance, business continuity, financial training services and ad hoc consultancy services

There will be a maximum of 6 suppliers awarded a place on this framework Lot.

### **II.2.5) Award criteria**

Quality criterion - Name: Quality / Weighting: 60.00%

Price - Weighting: 40.00%

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

Options: Yes

Description of options

48 month(s) from the commencement date, with 36 initial month(s) and option to extend 1x12 month(s)

### **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**

Lot 3 - Financial Services for Further and Higher Education Establishments and Wider Public Sector Organisations

Lot No

3

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

- 66171000 - Financial consultancy services
- 79212100 - Financial auditing services
- 72212440 - Financial analysis and accounting software development services
- 80500000 - Training services
- 79412000 - Financial management consultancy services
- 48812000 - Financial information systems
- 48442000 - Financial systems software package

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

NUTS codes

- UK - United Kingdom

Main site or place of performance

UK

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

This Lot incorporates the provisions of both Lots 1 and 2 as they apply to public sector organisations in the wider public sector, i.e. those organisations who are not schools or Academies and Multi Academy Trusts. A comprehensive suite of services will be available, including but not limited to, the following:

Strategic financial management planning and support, financial systems and accounting, financial governance and audit, business continuity, financial training services and ad hoc consultancy services

There will be a maximum of 6 suppliers awarded a place on this framework lot.

### **II.2.5) Award criteria**

Quality criterion - Name: Quality / Weighting: 60.00%

Price - Weighting: 40.00%

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

Options: Yes

Description of options

48 month(s) from the commencement date, with 36 initial month(s) and option to extend 1x12 month(s)

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

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## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Open procedure

#### **IV.1.3) Information about a framework agreement or a dynamic purchasing system**

The procurement involves the establishment of a framework agreement

#### **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 000-004733](#)

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## **Section V. Award of contract**

### **Contract No**

CA8423

### **Lot No**

1

### **Title**

Lot 1 - Financial Services for Maintained Schools

A contract/lot is awarded: Yes

### **V.2) Award of contract**

#### **V.2.1) Date of conclusion of the contract**

5 August 2021

#### **V.2.2) Information about tenders**

Number of tenders received: 5

The contract has been awarded to a group of economic operators: Yes

#### **V.2.3) Name and address of the contractor**

SAAF Education

12 Churchill Park, Colwick

Nottingham

NG4 2HF

Email

[e.cripwell@saafeducation.org](mailto:e.cripwell@saafeducation.org)

Telephone

+44 1159752400

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

[www.saaeducation.org](http://www.saaeducation.org)

The contractor is an SME

No

### **V.2.3) Name and address of the contractor**

Bishop Fleming LLP

Stratus House, Emperor Way

Exeter

EX1 3QS

Email

[tenders@bishopfleming.co.uk](mailto:tenders@bishopfleming.co.uk)

Telephone

+44 1392448800

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

<http://bishopfleming.co.uk>

The contractor is an SME

No

**V.2.3) Name and address of the contractor**

EPM Ltd

St Johns House,, Spitfire Close,

HUNTINGDON

PE29 6EP

Email

[epm@epm.co.uk](mailto:epm@epm.co.uk)

Telephone

+44 1480431993

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

[www.epm.co.uk](http://www.epm.co.uk)

The contractor is an SME

No

**V.2.3) Name and address of the contractor**

Beever and Struthers

St Georges House, 215/219 Chester Road

Manchester

M15 4JE

Email

[tenders@beeverstruthers.co.uk](mailto:tenders@beeverstruthers.co.uk)

Telephone

+44 1618324901

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

[www.beeverstruthers.co.uk](http://www.beeverstruthers.co.uk)

The contractor is an SME

Yes

**V.2.4) Information on value of contract/lot (excluding VAT)**

Total value of the contract/lot: £15,000,000

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## **Section V. Award of contract**

### **Contract No**

CA8423

### **Lot No**

2

### **Title**

Lot 2 - Financial Services for Academies and Multi Academy Trusts

A contract/lot is awarded: Yes

### **V.2) Award of contract**

#### **V.2.1) Date of conclusion of the contract**

5 August 2021

#### **V.2.2) Information about tenders**

Number of tenders received: 5

The contract has been awarded to a group of economic operators: Yes

#### **V.2.3) Name and address of the contractor**

Beever and Struthers

St Georges House, 215/219 Chester Road

Manchester

M15 4JE

Email

[tenders@beeverstruthers.co.uk](mailto:tenders@beeverstruthers.co.uk)

Telephone

+44 1618324901

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

[www.beeverstruthers.co.uk](http://www.beeverstruthers.co.uk)

The contractor is an SME

Yes

### **V.2.3) Name and address of the contractor**

Bishop Fleming LLP

Stratus House, Emperor Way

Exeter

EX1 3QS

Email

[tenders@bishopfleming.co.uk](mailto:tenders@bishopfleming.co.uk)

Telephone

+44 1392448800

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address



<http://bishopfleming.co.uk>

The contractor is an SME

No

**V.2.3) Name and address of the contractor**

EPM Ltd

St Johns House,, Spitfire Close,

HUNTINGDON

PE29 6EP

Email

[epm@epm.co.uk](mailto:epm@epm.co.uk)

Telephone

+44 1480431993

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

[www.epm.co.uk](http://www.epm.co.uk)

The contractor is an SME

No

**V.2.3) Name and address of the contractor**

SAAF Education

12 Churchill Park, Colwick

Nottingham

NG4 2HF

Email

[e.cripwell@saafeducation.org](mailto:e.cripwell@saafeducation.org)

Telephone

+44 1159752400

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

[www.saafeducation.org](http://www.saafeducation.org)

The contractor is an SME

No

#### **V.2.4) Information on value of contract/lot (excluding VAT)**

Total value of the contract/lot: £15,000,000

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## **Section V. Award of contract**

### **Contract No**

CA8423

### **Lot No**

3

### **Title**

Lot 3 - Financial Services for Further and Higher Education Establishments and Wider Public Sector Organisations

A contract/lot is awarded: Yes

### **V.2) Award of contract**

#### **V.2.1) Date of conclusion of the contract**

5 August 2021

#### **V.2.2) Information about tenders**

Number of tenders received: 3

The contract has been awarded to a group of economic operators: Yes

#### **V.2.3) Name and address of the contractor**

Bishop Fleming LLP

Stratus House, Emperor Way

Exeter

EX1 3QS

Email

[tenders@bishopfleming.co.uk](mailto:tenders@bishopfleming.co.uk)

Telephone

+44 1392448800

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

<http://bishopfleming.co.uk>

The contractor is an SME

No

### **V.2.3) Name and address of the contractor**

Beever and Struthers

St Georges House, 215/219 Chester Road

Manchester

M15 4JE

Email

[tenders@beeverstruthers.co.uk](mailto:tenders@beeverstruthers.co.uk)

Telephone

+44 1618324901

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

[www.beeverstruthers.co.uk](http://www.beeverstruthers.co.uk)

The contractor is an SME

Yes

**V.2.3) Name and address of the contractor**

SAAF Education

12 Churchill Park, Colwick

Nottingham

NG4 2HF

Email

[e.cripwell@saafeducation.org](mailto:e.cripwell@saafeducation.org)

Telephone

+44 1159752400

Country

United Kingdom

NUTS code

- UK - United Kingdom

Internet address

[www.saafeducation.org](http://www.saafeducation.org)

The contractor is an SME

No

**V.2.4) Information on value of contract/lot (excluding VAT)**

Total value of the contract/lot: £15,000,000

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## Section VI. Complementary information

### VI.3) Additional information

CPC Internal Reference Number is CPC/DU/FIN/01. The framework is being delivered by Crescent Purchasing Limited through Crescent Purchasing Consortium and its partners Dukefield Procurement Limited (who are a subsidiary of Dukefield Limited). Dukefield Procurement Limited are acting as agents of Crescent Purchasing Consortium in the development and on-going contract management of this framework. The Contracting Authority will be using an e-tendering system to conduct the procurement exercise. To access the procurement documentation suppliers must register their company details on the Sourcing Cloud system at <https://suppliers.multiquote.com>, the tender is available from the Opportunities menu on the login page of the site. The Contracting Authority shall not be under any obligation to accept the lowest tender or indeed any tender. Crescent Purchasing Consortium expressly reserves the rights:

- (a) To terminate the procurement process and not to award any contract as a result of the procurement process at any time;
- (b) To make whatever changes it may see fit to the content and structure of the procurement as detailed within the tender documentation;
- (c) To award a contract covering only part of the consortium's requirements if explicitly detailed within the tender documentation;
- (d) To disqualify any organisation from the process that canvasses any employee of the Contracting Authority during the procurement process or standstill period if applicable;
- (e) Seek clarifications to tender responses on the basis that any clarification sought will not confer any undue competitive advantage in the favour of any supplier from whom such clarifications are being sought;
- (f) Where the Contracting Authority can evidence that there is a conflict of interest, either personal or in consideration of any organisation bidding for the contract, the Contracting Authority shall have the explicit right to immediately exclude that person or organisation from the tender process entirely;
- (g) Where the Contracting Authority has engaged in any pre-market soft testing prior to the commencement of the procurement process, the Contracting Authority reserves the right to name any organisation that has been involved in these discussions and release any and all specifications / discussion documents to the market where appropriate to the subject matter of this procurement.

- (h) The Contracting Authority will not be liable for any costs incurred by tenderers.
- (i) The value of the framework provided in section II.1.5 is only an estimate and the Contracting Authority will not guarantee any business through this framework agreement; and
- (j) The Contracting Authority wishes to establish a Framework Agreement open for use by all Public Sector Bodies as stated in II.1.4.

Tenderers should note, in reference to Section IV.1.3), Envisaged maximum number of participants to the framework:

Where, following the evaluation of bids, more than one Tenderer is tied with the same final evaluation score and are ranked in the last supplier award position within a particular Lot, each of these tenderers shall be deemed to occupy the last Framework Agreement contract award position for the purpose of calculating the maximum number of Suppliers under the framework Lot.

The Contracting Authority will award a Framework Agreement to additional Tenderers beyond the stated maximum number on any particular Lot, where their final evaluation score (s) is within 0.5 % of the last placed position only. For the avoidance of doubt, the last placed position in respect of each Lot of this framework is 6th place on each of the three framework Lots. Therefore on a lot by lot basis, Tenderers within 0.5 %, along with the Tenderer in last placed position, shall be deemed to occupy the last Framework Agreement contract award position for each respective lot.

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

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

Crescent Purchasing Consortium

Procurement House, Unit 23, Leslie Hough Way

Salford

M6 6AJ

Country

United Kingdom

### **VI.4.2) Body responsible for mediation procedures**

Crescent Purchasing Consortium

Procurement House, Unit 23, Leslie Hough Way

Salford

M6 6AJ

Country

United Kingdom

#### **VI.4.3) Review procedure**

Precise information on deadline(s) for review procedures

Crescent Purchasing Consortium will incorporate a minimum 10-day standstill period at the point information on the award of contract is communicated to tenderers. Bidders who are unsuccessful shall be informed by the Contracting Authority as soon as possible after the decision is made as to the reasons why the bidder was unsuccessful. If an appeal regarding the award of the contract has not been successfully resolved, the Public Procurement Regulations provide for the aggrieved parties who have been harmed or who are at risk of harm by the breach of the rules to take action in the High Court (England, Wales and Northern Ireland). Any action must be generally brought within 3 months. If a declaration of ineffectiveness is sought, any such action must be brought within 30 days where the Contracting Authority has communicated the award of the contract and a summary of reasons to tenderers, or otherwise within 6 months of the contract being entered into. Where a contract has not been entered into, the Court may order the setting aside of the award decision or order the Contracting Authority to amend any document and may award damages. If the Contract has been entered into the Court may, depending on the circumstances, award damages, make a declaration of ineffectiveness, order the Contracting Authority to pay a fine, and/or order that the duration of the contract be shortened. The purpose of the standstill period referred to above is to allow the parties to apply to the Courts to set aside the award decision before the contract is entered into.

#### **VI.4.4) Service from which information about the review procedure may be obtained**

Crescent Purchasing Consortium

Procurement House, Unit 23, Leslie Hough Way

Salford



M6 6AJ

Country

United Kingdom