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Not applicable

Early Engagement and Request for Information (RFI) - Accounting Software for Education

TRINITY MULTI ACADEMY TRUST

F14: Notice for changes or additional information

Notice identifier: 2023/S 000-026377

Procurement identifier (OCID): ocds-h6vhtk-03f7b1

Published 6 September 2023, 4:15pm

Section I: Contracting authority/entity

I.1) Name and addresses

TRINITY MULTI ACADEMY TRUST

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Contact

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United Kingdom

Region code

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Internet address(es)

Main address

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Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Early Engagement and Request for Information (RFI) - Accounting Software for Education

II.1.2) Main CPV code

- 48440000 - Financial analysis and accounting software package

II.1.3) Type of contract

Supplies

II.1.4) Short description

Early Engagement and Request for Information (RFI)

Trinity Multi Academy Trust (Trinity MAT) is seeking a supplier and provider for an accounting software solution suitable for the education sector, scalable for growth across multiple sites.

As a growing Multi Academy Trust, we are aspiring for our organisation to grow over the next few years, as such we are seeking a supplier who can grow with us and maintain and provide their solution to all our academies as we increase our offering to more academies and Schools.

Key services and features requested from the solution

- 300+ User Licences and the ability to increase as Trinity MAT grows.
- Cloud based solution
- EFSA chartered accounts compatible
- Ability to automate tasks
- Consolidation facilities of multiple accounts
- Integration compatibility with HR, Payroll, Budget planning software (BPS)

Current Academies

- Trinity Academy Akroydon (Halifax, West Yorkshire)
- Trinity Academy St Peter's (Halifax, West Yorkshire)
- Trinity Academy St Chads (Brighouse, West Yorkshire)
- Trinity Academy Halifax (Halifax, West Yorkshire)
- Trinity Academy Bradford (Bradford, West Yorkshire)
- Trinity Academy Grammar (Halifax, West Yorkshire)
- Trinity Sixth Form Academy (Halifax, West Yorkshire)
- Trinity Academy Leeds (Leeds, West Yorkshire)
- Trinity Academy Cathedral (Wakefield, West Yorkshire)
- Trinity Academy St Edward's (Barnsley, South Yorkshire)
- Trinity MAT Offices (Halifax, West Yorkshire)

Contract Period

- 3 Years + 2 Year optional extension

Expression of Interest of early engagement

If you would like to express your interest in this opportunity, please contact procurement@trinitymat.org by Friday 30th September 2023 (15:00).

Section VI. Complementary information

VI.6) Original notice reference

Notice number: [2023/S 000-025332](#)

Section VII. Changes

VII.1.2) Text to be corrected in the original notice

Section number

II.1.2

Instead of

Main CPV code

- 48440000 - Financial analysis and accounting software package

Read

Main CPV code

- 48443000 - Accounting software package

Section number

II.1.1

Read

Text

Early Engagement and Request for Information (RFI)

Trinity Multi Academy Trust (Trinity MAT) is seeking a supplier and provider for an accounting software suitable for the education sector and compliant with the EFSA Chartered Accounts nominal structure , scalable for growth across multiple sites.

As a growing Multi Academy Trust, we are aspiring for our organisation to grow over the next few years, as such we are seeking a supplier who can grow with us and maintain and provide their solution to all our academies as we increase our offering to more academies and Schools.

Key services and features requested

- Up to 40 Full Access User licenses with full system capabilities and the ability to increase to 90 Full Access User licenses as Trinity MAT grows.
- Up to 250 Access licenses with system capabilities to raise requisitions, raise purchase

orders etc. with the ability to increase to 800 Access licenses as Trinity MAT grows.

- Fully Cloud based solution
- Compatible with the EFSA chartered account's nominal structure.
- API link for ESFA automated account returns
- Compatible with the requirements and needs of the Education sector for Multi Academy Trusts
- Ability to automate tasks (Desirable)
- Consolidation feature for multiple databases or ledgers into one account.
- Integration compatibility with other platforms such as payroll (Edupay), Budget planning software (BPS by Orovia) - desirable
- Features for Asset management including amortisation and depreciation over time - desirable

Current Academies

- Trinity Academy Akroydon (Halifax, West Yorkshire)
- Trinity Academy St Peter's (Halifax, West Yorkshire)
- Trinity Academy St Chads (Brighouse, West Yorkshire)
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- Trinity Academy Bradford (Bradford, West Yorkshire)
- Trinity Academy Grammar (Halifax, West Yorkshire)
- Trinity Sixth Form Academy (Halifax, West Yorkshire)
- Trinity Academy Leeds (Leeds, West Yorkshire)
- Trinity Academy Cathedral (Wakefield, West Yorkshire)
- Trinity Academy St Edward's (Barnsley, South Yorkshire)
- Trinity MAT Offices (Halifax, West Yorkshire)

Contract Period

- 3 Years + 2 Year optional extension

Expression of Interest of early engagement

If you would like to express your interest in this opportunity, please contact procurement@trinitymat.org by Friday 23rd September 2023 (15:00).