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Tender

## **HFL Education - Finance, Accounting and Management Information Systems Framework Agreement**

Herts for Learning Ltd

F02: Contract notice

Notice identifier: 2023/S 000-032910

Procurement identifier (OCID): ocids-h6vhtk-041666

Published 7 November 2023, 11:54am

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

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

Herts for Learning Ltd

Robertson House, Six Hills Way

Stevenage

SG1 2FQ

#### **Contact**

Nicola Wiley

#### **Email**

[nicola.wiley@hfleducation.org](mailto:nicola.wiley@hfleducation.org)

#### **Country**

United Kingdom

**NUTS code**

UKH23 - Hertfordshire

**Internet address(es)**

Main address

<https://www.hfleducation.org/>

Buyer's address

<https://www.hfleducation.org/>

**I.3) Communication**

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

<https://in-tendhost.co.uk/educationportal/>

Additional information can be obtained from the above-mentioned address

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

**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**

HFL Education - Finance, Accounting and Management Information Systems Framework Agreement

Reference number

INT-HFL007

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

- 48000000 - Software package and information systems

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

Supplies

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

This Multi-Lot, Multi Supplier Framework Agreement is for Finance, Budgeting and Accounting Systems as well as Management Information Systems to be provided for Schools, Academy Trusts and Education Settings, offering a full range of functions that enable school leaders and staff to manage their settings effectively and efficiently. With regard to Finance, Budgeting and Accounting Systems the Framework aspires to provide a broad range of functionality giving schools control over their finances, from funding, income, expenditure, and capital. Core functionality must meet the DfE defined Common Basic Data Set (see functionality section with the specification) as a minimum. With regard to Management Information Systems the Framework aspires to provide a cloud based MIS solution where the definition of such is that "the entire MIS system is hosted offsite and accessible via any web-enabled device from any location at any time".

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

Value excluding VAT: £15,000,000

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

This contract is divided into lots: Yes

Tenders may be submitted for all lots

## **II.2) Description**

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

Cloud Based MIS and FS Solution for a Maintained Primary Phase Setting

Lot No

1

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

- 48000000 - Software package and information systems

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

NUTS codes

- UK - United Kingdom

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

This Multi-Lot, Multi Supplier Framework Agreement is for Finance, Budgeting and Accounting Systems as well as Management Information Systems to be provided for Schools, Academy Trusts and Education Settings, offering a full range of functions that enable school leaders and staff to manage their settings effectively and efficiently. With regard to Finance, Budgeting and Accounting Systems the Framework aspires to provide a broad range of functionality giving schools control over their finances, from funding, income, expenditure, and capital. Core functionality must meet the DfE defined Common Basic Data Set (see functionality section with the specification) as a minimum. With regard to Management Information Systems the Framework aspires to provide a cloud based MIS solution where the definition of such is that "the entire MIS system is hosted offsite and accessible via any web-enabled device from any location at any time".

### **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: £1,875,000

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

Initial period of 2 years with option to extend twice for a further 12 months each.

### **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**

Cloud based MIS and FS solution for a primary phase academy setting.

Lot No

2

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

- 48000000 - Software package and information systems

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

NUTS codes

- UK - United Kingdom

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

This Multi-Lot, Multi Supplier Framework Agreement is for Finance, Budgeting and Accounting Systems as well as Management Information Systems to be provided for Schools, Academy Trusts and Education Settings, offering a full range of functions that enable school leaders and staff to manage their settings effectively and efficiently. With regard to Finance, Budgeting and Accounting Systems the Framework aspires to provide a broad range of functionality giving schools control over their finances, from funding, income, expenditure, and capital. Core functionality must meet the DfE defined Common Basic Data Set (see functionality section with the specification) as a minimum. With regard to Management Information Systems the Framework aspires to provide a cloud based MIS solution where the definition of such is that "the entire MIS system is hosted offsite and accessible via any web-enabled device from any location at any time".

### **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: £1,875,000

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

Duration in days

48

This contract is subject to renewal

Yes

Description of renewals

Initial period of 2 years with option to extend twice for a further 12 months each.

### **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**

Cloud based MIS and FS solution for a maintained secondary phase setting

Lot No

3

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

- 48000000 - Software package and information systems

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

NUTS codes

- UK - United Kingdom

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

This Multi-Lot, Multi Supplier Framework Agreement is for Finance, Budgeting and Accounting Systems as well as Management Information Systems to be provided for Schools, Academy Trusts and Education Settings, offering a full range of functions that enable school leaders and staff to manage their settings effectively and efficiently. With regard to Finance, Budgeting and Accounting Systems the Framework aspires to provide a broad range of functionality giving schools control over their finances, from funding, income, expenditure, and capital. Core functionality must meet the DfE defined Common Basic Data Set (see functionality section with the specification) as a minimum. With regard to

Management Information Systems the Framework aspires to provide a cloud based MIS solution where the definition of such is that "the entire MIS system is hosted offsite and accessible via any web-enabled device from any location at any time"

### **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: £1,875,000

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

Initial period of 2 years with option to extend twice for a further 12 months each

### **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**

Cloud based MIS and FS solution for a secondary phase academy setting.

Lot No

4

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

- 48000000 - Software package and information systems

**II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

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

This Multi-Lot, Multi Supplier Framework Agreement is for Finance, Budgeting and Accounting Systems as well as Management Information Systems to be provided for Schools, Academy Trusts and Education Settings, offering a full range of functions that enable school leaders and staff to manage their settings effectively and efficiently. With regard to Finance, Budgeting and Accounting Systems the Framework aspires to provide a broad range of functionality giving schools control over their finances, from funding, income, expenditure, and capital. Core functionality must meet the DfE defined Common Basic Data Set (see functionality section with the specification) as a minimum. With regard to Management Information Systems the Framework aspires to provide a cloud based MIS solution where the definition of such is that "the entire MIS system is hosted offsite and accessible via any web-enabled device from any location at any time".

**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: £1,875,000

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

Initial period of 2 years with option to extend twice for a further 12 months each

### **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**

Cloud based MIS and FS solution for MATS

Lot No

5

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

- 48000000 - Software package and information systems

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

NUTS codes

- UK - United Kingdom

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

This Multi-Lot, Multi Supplier Framework Agreement is for Finance, Budgeting and Accounting Systems as well as Management Information Systems to be provided for Schools, Academy Trusts and Education Settings, offering a full range of functions that enable school leaders and staff to manage their settings effectively and efficiently. With regard to Finance, Budgeting and Accounting Systems the Framework aspires to provide a broad range of functionality giving schools control over their finances, from funding, income, expenditure, and capital. Core functionality must meet the DfE defined Common Basic Data Set (see functionality section with the specification) as a minimum. With regard to Management Information Systems the Framework aspires to provide a cloud based MIS solution where the definition of such is that "the entire MIS system is hosted offsite and accessible via any web-enabled device from any location at any time".

## **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: £1,875,000

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

Initial period of 2 years with option to extend twice for a further 12 months each.

## **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**

Cloud based FS solution for Single Academy Trusts across primary and secondary phase settings

Lot No

6

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

- 48444000 - Accounting system

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

NUTS codes

- UK - United Kingdom

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

This Multi-Lot, Multi Supplier Framework Agreement is for Finance, Budgeting and Accounting Systems as well as Management Information Systems to be provided for Schools, Academy Trusts and Education Settings, offering a full range of functions that enable school leaders and staff to manage their settings effectively and efficiently. With regard to Finance, Budgeting and Accounting Systems the Framework aspires to provide a broad range of functionality giving schools control over their finances, from funding, income, expenditure, and capital. Core functionality must meet the DfE defined Common Basic Data Set (see functionality section with the specification) as a minimum.

### **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: £1,875,000

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

Initial period of 2 years with option to extend twice for a further 12 months each.

### **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**

Cloud based FS solution for Multi Academy Trusts across primary and secondary phase settings

Lot No

7

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

- 48444000 - Accounting system

**II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

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

This Multi-Lot, Multi Supplier Framework Agreement is for Finance, Budgeting and Accounting Systems as well as Management Information Systems to be provided for Schools, Academy Trusts and Education Settings, offering a full range of functions that enable school leaders and staff to manage their settings effectively and efficiently. With regard to Finance, Budgeting and Accounting Systems the Framework aspires to provide a broad range of functionality giving schools control over their finances, from funding, income, expenditure, and capital. Core functionality must meet the DfE defined Common Basic Data Set (see functionality section with the specification) as a minimum.

**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: £1,875,000

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

Duration in months

48

This contract is subject to renewal

Yes

Description of renewals

Initial period of 2 years with option to extend twice for a further 12 months each.

### **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**

Cloud based FS solution for maintained primary and secondary phase set- tings

Lot No

8

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

- 48444000 - Accounting system

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

NUTS codes

- UK - United Kingdom

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

This Multi-Lot, Multi Supplier Framework Agreement is for Finance, Budgeting and Accounting Systems as well as Management Information Systems to be provided for Schools, Academy Trusts and Education Settings, offering a full range of functions that enable school leaders and staff to manage their settings effectively and efficiently. With

regard to Finance, Budgeting and Accounting Systems the Framework aspires to provide a broad range of functionality giving schools control over their finances, from funding, income, expenditure, and capital. Core functionality must meet the DfE defined Common Basic Data Set (see functionality section with the specification) as a minimum.

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

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Value excluding VAT: £1,875,000

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

Duration in months

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This contract is subject to renewal

Yes

Description of renewals

Initial period of 2 years with option to extend twice for a further 12 months each.

### **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



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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**

Selection criteria as stated in the procurement documents

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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

Framework agreement with several operators

Envisaged maximum number of participants to the framework agreement: 24

In the case of framework agreements, provide justification for any duration exceeding 4 years:

not exceeding 4 years

#### **IV.1.8) Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: No

### **IV.2) Administrative information**

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

Date

7 December 2023

Local time

2:00pm

#### **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

7 December 2023

Local time

2:01pm

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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**

Herts for Learning Ltd

Stevenage

Country

United Kingdom