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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): ocds-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

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

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

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

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

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

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