



**Holy Family Catholic Multi-Academy
Our Lady of Lourdes Catholic Multi-Academy**



INVITATION TO SUBMIT A TENDER PROPOSAL

FOR

Lot 1 Payroll & Employee Services

Lot 2 Human Resource Consultancy Services

**Lot 3 Integrated Payroll & Employee and
Human Resources Consultancy Service**

Closing Date: *9am 7th May 2021*

Contact: email: *tenders@lourdesmac.org.uk*

1. INTRODUCTION

1.1 Our Lady of Lourdes Catholic MAC – Head office 12, Clews Road, Oakenshaw, Redditch, Worcestershire; B98 7ST

www.lourdesmac.org.uk

Established 1st July 2014

- St Augustine’s Catholic High school Student NOR 985 Staff 100
- Trinity Catholic School Student NOR 543 Staff 66
- St Bedes Catholic Middle school Student NOR 656 Staff 80
- St Thomas More Catholic First school Student NOR 194 Staff 31
- Our Lady of Mount Carmel Catholic First school Student NOR 194 Staff 31
- St Peters Catholic First school Student NOR 288 Staff 38
- Central Services Team approx Staff 50

Holy Family Catholic MAC – Head officer c/o St Benedicts Catholic Secondary School, Kinwarton Road, Alcester, Warwickshire; B49 6PX

www.holyfamilycatholicmac.org

Established 1st April 2017

- St Benedicts Catholic Secondary school Student NOR 680 Staff 80
- Our Lady Catholic Primary school Student NOR 97 Staff 16
- St Gregory’s Catholic Primary school Student NOR 197 Staff 25
- St Mary’s Catholic Primary school Evesham Student NOR 163 Staff 30
- St Mary’s Catholic Primary school Henley Student NOR 103 Staff 15
- St Mary’s Catholic Primary school Broadway Student NOR 95 Staff 17

The two Multi Academies are working towards a merger and the formation of one Multi Academy Company from September 2021. In line with the Archdiocese Academy Strategy, it is proposed a further 12 Primary schools will join the new Multi Academy by September 2022.

The Our Lady of Lourdes and Holy Family Catholic Multi Academies invite a tender submission to provide services from the 1st September 2021 to the newly formed Multi Academy. Please note the Holy Family Catholic MAC will be joining the Our Lady of Lourdes Catholic MAC however the Multi Academy will be renamed. The tender submission must demonstrate the ability to support the growth strategy of the Multi Academy.

Submissions are welcomed for:

Lot 1 Payroll & Employee Services ONLY

Lot 2 Human Resources Consultancy Services ONLY

Lot 3 Integrated Payroll & Employee and Human Resources Consultancy Services

Contract length 1st September 2021 – 31st August 2024 with the option to extend.

A 6 month termination notice for either party.

1.2 Project Schedule

Issue Invitation to Tender	12 th April 2021
Clarification period	12 th April 2021 – 30 th April 2021
Tender submission	9am 7 th May 2021
Supplier Presentations	13 th May 2021
Notify Bidders of outcome	14 th May 2021
Stand down period	17 th – 28 th May 2021
Contract Award	31 st May 2021
Contract mobilisation period	1 st June 2021 – 30 th September 2021
Parallel running	1 st September 2021 – 30 th September 2021
Go Live	1 st October 2021

2. INSTRUCTIONS TO TENDERERS

2.1 COMPLETED TENDER SUBMISSIONS SHOULD BE SUBMITTED TO:-

tenders@lourdesmac.org.uk marked OLOLPA_HR2021

The following documents are required:

- **Signed declaration.**
- **APPENDIX 2 – Pricing schedule**
- **APPENDIX 3 – Tender submission**
- **Public Liability insurance**
- **Employers Liability insurance**

Suppliers should ensure that they allow enough time to submit their response. **The organisation will accept no responsibility for difficulties during the process of submission and/or late or lost submissions.**

2.2 The deadline for the return of submissions is **9am on 7th May 2021.** **LATE SUBMISSIONS WILL NOT BE ACCEPTED.**

2.3 Please study the documentation carefully. If you are in any doubt as to any technical aspects of the specification/project brief or require clarification of any part of the document please contact **Hannah Clemons** Hannah@lourdesmac.org.uk **Clarification period 12th April 2021 – 30th April 2021.**

2.4 Suppliers are required to submit competitive prices strictly in accordance with the attached specification/project brief.

2.5 Suppliers must fully complete all parts of this document using the same question numbering format as used in this document and sign the declaration. Failure to provide a completed quotation in the required format may result in the quotation not being considered.

- 2.6 Freedom of Information - In accordance with **Freedom of Information Act 2000**, from January 2005, public organisations must respond within 20 working days to valid written requests for information from anyone. The information requested must be supplied unless it falls into specified categories of information which include: confidential, personal, trade secret, or information which would or would be likely to prejudice the Supplier's or the organisation's commercial interests. These categories are exemptions under which information may not be disclosed.
- 2.7 It will be the Supplier's responsibility to clearly state in their Proposal submission any information which they regard as confidential, personal information, trade secret or may prejudice their commercial interests and to discuss this with the organisation prior to submission.
- 2.8 Suppliers are advised that information which falls into our agreed interpretation of the legal definition of confidentiality, personal information, trade secret or prejudice to their commercial interests may still have to be disclosed in some circumstances... You should be aware that the organisation may be forced to make information public as a result of an appeal by a member of the public against our initial decision not to reveal information. The public can appeal through our internal complaint's procedure and ultimately to The Information Commissioner's Office, the Government organisation responsible for enforcing the Act.
- 2.9 You will also need to provide with your quotation submission a contact within your organisation to ensure that should we need to consult on a Freedom of Information request we can do this promptly. If we are unable to contact anyone to consult, we may have to release the information to ensure that we remain within the 20 working days deadline.

3. EVALUATION

- 3.1 Phase 1 of the Evaluation Process - Proposals received will initially be reviewed on the basis of compliance with the Tender submission and all documents required have been submitted.
- 3.2 The bids from those Suppliers who meet the requirements in Phase 1 will be fully evaluated at Phase 2 of the Evaluation Process. The evaluation will be on the basis of most economically advantageous tender as follows.

Price 40%
Quality 60%

Quality responses will be scored using the 0-3 scoring mechanism detailed below. Tenderers scoring a 3 will receive the entire weighting mark for each question. Those scoring a 2 will receive 2/3's of the weighting mark, and so on, e.g. a score of 2 out of 3 against a question with a 1% weighting will result in the award of a 0.66% weighted score, .i.e. $2/3 \times 1 = 0.66$.

Quality responses will be scored using the scoring mechanism detailed below.

0	Unacceptable	<i>Nil or inadequate response. Fails to demonstrate an ability to meet the requirement.</i>
1	Poor	<i>Response is poor. The response addresses limited elements of the requirement but contains insufficient detail or explanation to demonstrate how the requirement will be fulfilled.</i>
2	Satisfactory	<i>Response is partially relevant. The response demonstrates a satisfactory understanding of the requirement but lacks details on how the requirement will be fulfilled in certain areas.</i>
3	Good	<i>Response is relevant and good and meets the requirement in all respects.</i>

3.3 The organisation may request bid presentations as part of the bid clarification process to enable the organisation to better understand a Suppliers' bid. Where such clarifications are required Suppliers will be notified and invited to attend on **13th May 2021** Please Note – it may not be necessary to invite any or all bidders if no clarifications are required.

3.4 The organisation will endeavour to reach a decision by **31st May 2021**. However, the organisation is not bound to accept any quote submitted.

3.5 Resulting contracts will be subject to the terms and conditions of contract for the framework agreement – CPC/DU/HR/21 Framework for the provision of Outsourced Human Resource Services inc Payroll Services. Please note these Terms and Conditions are already contracted and are non-negotiable.

4. SPECIFICATION

4.1 The specification is detailed in Appendix 1.

5. PRICE SCHEDULE

5.1 Not used

5.2 Suppliers are required to complete the Pricing Schedule (Appendix 2)

5.3 The pricing will be held for the duration of the Contract.

6. DECLARATION

I/We hereby offer to provide the services as specified in Appendix 1 in accordance with the Conditions of Contract governing the CPC/DU/HR/21.

Signed

Name (Block Capitals)

Designation

For and on behalf of

.....

Tel. Fax.....

E-mail address

APPENDIX 1 - SPECIFICATION

Business continuity

Bidders are required to provide details of Business continuity; Disaster recover or Risk management plans. Assurances are required to demonstrate continued provision should there be a major event which resulted in loss of resources to deliver the service.

Specification for each Lot has been provided below, the list is not exhaustive, and bidders are encouraged to detail the full services available within the tender submission.

Lot 1 Payroll & Employee Service Services Specification.

Cloud Based system. Externally hosted and managed, accessed via a dedicated client or website. Service provider responsibility for back up of all data.

Service level agreement must guarantee a high level of availability.

Unlimited access to a payroll support team.

Provide a BACS Bureau service in respect of Payroll payment services.

Provide a **secure** HR & Payroll electronic system for employee self-service and authorised manages a suite of standard management and employee reports. Bidders are required to demonstrate the level of security provided and mitigation to ensure data security.

Payment of salaries to employees through Bankers Automated Clearing System (BACS).

Process all temporary and permanent variations to employees as notified either via employee self-service or to a payroll support helpdesk. Facility to make bulk changes to various staff groups on notice of an Authorised Officer.

Process electronic monthly payslips for all employees.

The solution must have the facility to maintain multiple pay structures.

Calculate employees' and employer's Class 1 National Insurance contributions in accordance with HM Revenue and Customs regulations. Calculate employer's Class 1A National Insurance contributions arising on benefits in kind and expenses in accordance with HMRC Regulations.

Calculate of adjustments to the Inland Revenue payments in accordance with current regulations and operate income tax codes changes for Payees including bulk updates and budget changes.

Make payment to the collector of taxers monthly via direct credit drawn on the Multi Academy bank account:

- Any sums deducted from payees in respect of income tax, National Insurance contributions and student loan repayments.

- Employer's National Insurance contributions.

Attachment of Earnings Orders will be operated in accordance with the rules governing the operation of each type of order, including the deduction from a Payee of any statutorily authorised administration fee. Payment to be made by Direct Credit drawn on the Multi Academy bank account and remitted to the relevant issuing body via BACS.

Process emergency salary payments.

Provide a monthly payroll and variation report for authorisation.

Operate payroll aspects of salary sacrifice schemes.

Provide the administration support of Student Loan repayments.

Calculate entitlement to statutory payments SSP/SMP/SAP/SPP.

Provide a P45 for leaving employees and notify appropriate bodies.

Commence and cease pension contributions to the respective pension schemes (TP & LGPS) in line with the rules of the scheme and the rights to Opt out of the payee, contribution rates should be calculated in accordance with the scheme rules and regulations. Additional Voluntary Contributions scheme contributions to be calculated in accordance with the rules of the scheme administrator. Make payment to the relevant pension provider by the agreed submission dates.

Administration of the Pension Auto enrolment, provide statutory notifications to employees.

End of Year services:

- Undertake the end of year reconciliation for income tax, National insurance, SSP, SMP, OSPP, ASPP, SHPP, SAP and Student Loan Repayments.
- Prepare annual P60 End of Year Certificated for all relevant Payees.
- Prepare annual statements for all Payees who have been included in the P11D return.
- Annual teachers reporting as per current statutory regulations.
- Annual pension reporting as per current statutory regulations.

Lot 2 Human Resources Consultancy Services Specification.

Unlimited access to professional and flexible HR consultancy service team with extensive experience in the HR Education sector who are able to support to resolve an extensive range of employment issues that arise.

Provide a proactive service with the development of the employee is at the centre.

Provision of unlimited casework support by a named caseworker.

Regular update reports/meetings provided to the Multi Academy leadership team.

Medical referrals and liaison with Occupational Health services, support provided to management regarding recommendations made.

Professional advice and support provided related to Transfer of Undertakings (Protection of Employment) Regulation 2006 (TUPE)

Liaising with Trade Unions and other agencies.

Provide professional advice to support organisations change including restructures and redundancies.

Attend and support Human Resources related meetings with employees and other parties as required this includes Employment tribunals.

Provide advice on recruitment processes including safer recruitment, job descriptions, person specifications and supporting equal pay through the provision of Job grading.

Accessible communication links, telephone advisory service, regular updates on employment related matters tailored to the education sector.

HR Policy & Guidance – legally compliant tailored policy documents created in line with the Catholic Education Service policies.

Lot 3 Integrated Payroll & Employee and Human Resources Consultancy Service

All services detailed in Lot 1 and Lot 2, in addition:

A seamless Integrated service between the payroll and HR consultancy teams where limited contact is required from the Multi Academy.

APPENDIX 2 – PRICING SCHEDULE

Please clearly provide details of proposed costs for each Lot the tender submission is made for. Please clearly detail the cost of integrating future schools.

Lot 1 Payroll & Employee Service Services Specification.	Implementation cost: Year one costs: Ongoing annual costs: Details:
Lot 2 Human Resources Consultancy Services Specification.	Implementation cost: Year one costs: Ongoing annual costs: Details:
Lot 3 Integrated Payroll & Employee and Human Resources Consultancy Service	Implementation cost: Year one costs: Ongoing annual costs: Details:

APPENDIX 3 – Tender submission

1 - Organisation and Contact details

Full name of organisation tendering:		
Registered office address:		
Company registration number:		
Vat registration number:		
Contact Name:		
Phone number:		
Email address:		
Consortia and Sub-Contracting: If your answer is b or c please indicate by inserting the relevant company/organisation name, the composition of the supply chain indicating which member will be responsible for the elements of the service.	a) Your organisation is bidding to provide the services required itself.	
	b) Your organisation is bidding in the role of Prime Contractor and intends to use third parties to provide some services	
	c) The Potential Provider is a consortium	
Tender submission: Please indicate the Lot or Lots covered in the tender submission.	Lot 1 Payroll & Employee service	
	Lot 2 Human Resources Consultancy Services	
	Lot 3 Integrated Payroll & Employee and Human Resources Consultancy Service	

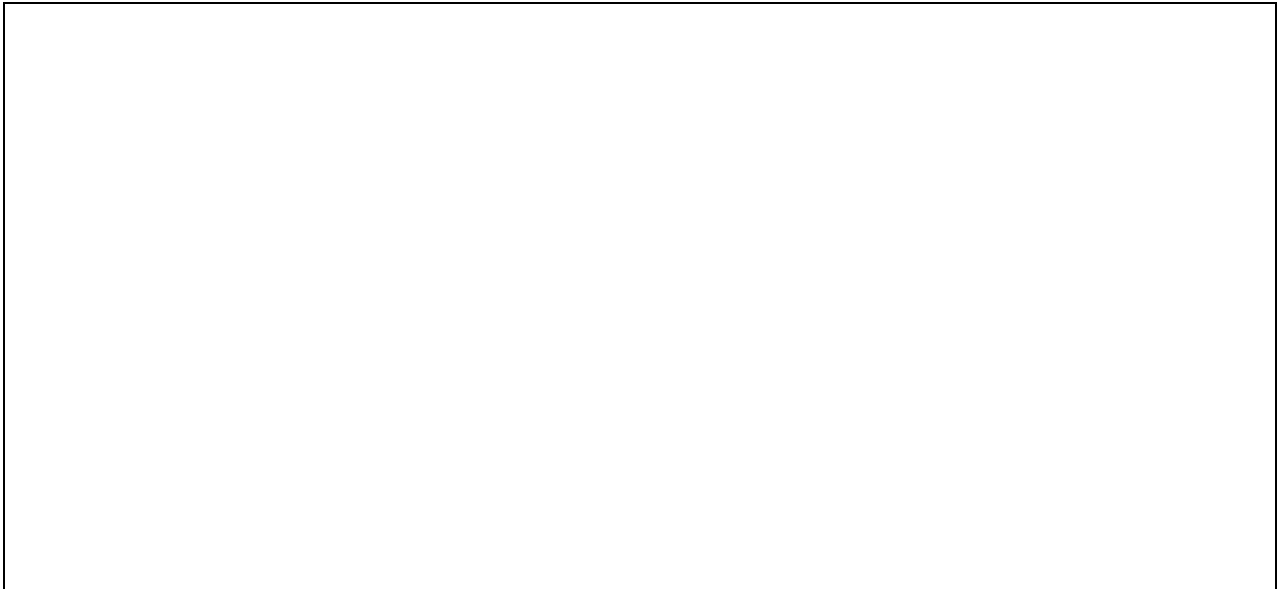
2 – Method statement

2.1 Please indicate how the requirements set in APPENDIX 1 – SPECIFICATION will be met.

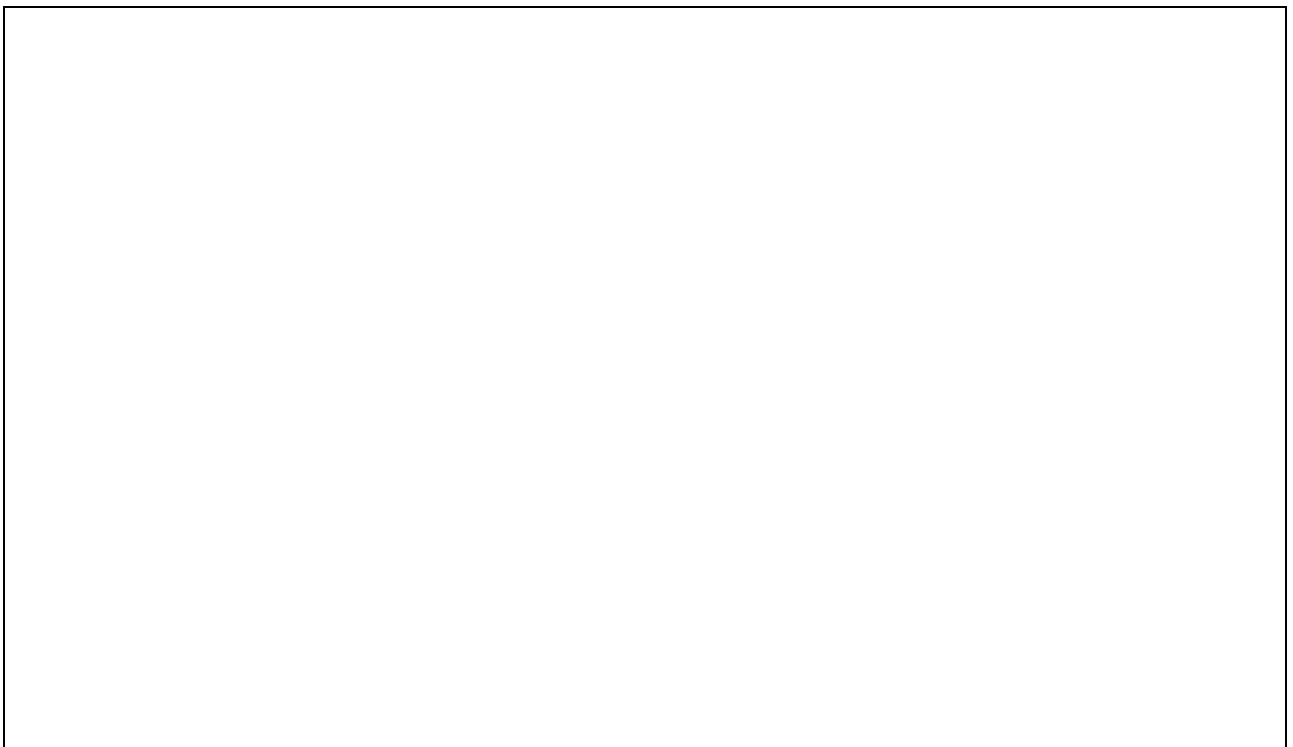
	Fully Compliant	Partially Compliant	Not Included
Lot 1 Payroll & Employee services			
Lot 2 Human Resource Consultancy services			
Lot 3 Payroll & Employee and HR Consultancy services			

2.2 Please provide an overview of the proposed solution, including:

- I. Which modules are included
- II. Interfaces to other systems
- III. Underlying database
- IV. Report writing software
- V. Robust audit trail
- VI. Multiple access levels
- VII. Workflow/automated authorisation process



2.3 Please provide a brief description and diagram to depict the functional aspects of the solution:



2.4 List all third party software that you are intending to use:

2.5 Data migration: Please detail your proposed approach to data migration; this should include methods for data verification and rollback in the event of a failed migration:

2.6 Reporting capability: Please describe the functionality available and enclose examples of standard reports eg employee contract generation, absence reports, establishment reports, breakdown of payments by individual element:

2.7 Please provide details of planned software developments in the next 12 – 24 months:

3 – General

3.1 Please provide a brief overview of your organisation and how it could best provide the services required as detailed in Appendix 1 Specification and support the Multi Academy growth strategy:

3.2 Please provide details of the help/support to be provided which is included in your tender price. These should take account of administrator/user training and support.

4 – Technical requirements

4.1 Please detail the GDPR compliance measures in place and the location of where data is stored and any accreditations or certifications you have in place for data security.

4.2 Please provide a technical overview of the solution and minimum specifications for client access and broadband connectivity.

5 – Equal Opportunities.

5.1 Does your organisation have an Equal Opportunities policy? If yes, please indicate how it is communicated to employees.

6 – Technical ability – staff

6.1 Please provide a summary of qualifications and experience for the proposed project key person and other key personnel.

7 – Business Continuity

7.1 Does your organisation have a Business Continuity, Disaster Recover or Risk Management Plan? Briefly describe what key actions your organisation will take to ensure continued provision should there be a major event which resulted in loss of resources.

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7.2 Where applicable, does the data centre have a Business Continuity, Disaster Recover or Risk Management Plan? Briefly describe what key actions the data centre will take to ensure continued provision should there be a major event which resulted in loss of resources.

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8 – References

Please provide details of two reference customers that have at least 3 years live system use.		
Customer organisation Name:		
Customer contact Name, phone number and email address:		
Contract title, Contract Start date		
Brief description of the services provided.		

9 - CONFLICTS OF INTEREST DECLARATION

Please complete Section A or B as appropriate

Section A

I/We warrant that:

There **would be no** conflict or perceived conflict of interest arising from any existing relationship that I/We might have and the members of staff involved in the conduct of the procurement procedure. If in doubt, please declare. I/We acknowledge that a failure by us to declare a potential conflict of interest, which I/We should have reasonably known about, may result in our disqualification from the tender process or a termination of any contract awarded as a result of this tender process.

Name:

Position/Status:

Company Name:

Address:

Date:

Section B

I / We warrant that:

There **could be** a possible conflict or perceived conflict arising from any existing relationship that I/We might have and the members of staff involved in the conduct of the procurement procedure. Please explain what the possible conflict or perceived conflict of interest may be and who it relates to and how it could have an adverse effect on this contract.

Name:

Position/Status:

Company Name:

Date:

END