Invitation to Tender (ITT)

Payroll bureau and HR Platform system

The Mead Educational Trust

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ITT Contact

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1   Introduction

This tender is initiated by The Mead Educational Trust. The Mead Educational Trust (TMET) is a growing family of primary & secondary schools, which currently includes 13 schools in Leicester & Leicestershire (5 secondary and 8 primaries), as well as a Teaching School (TsHub) & SCITT. Details of the schools can be found at Our Schools – The Mead Educational Trust | TMET Leicester MAT.

There are currently c.1.4k employees in the Trust and the gross monthly salary value is c.£3.3m. The Trust continues to grow, which means these figures are likely to increase over the coming years.

Currently one payroll bureau provides payroll services for all TMET schools and their central team (TsHub & SCITT). This contract is coming to an end, therefore we will be running a tendering exercise.

The contract duration will be three years (*duration can be negotiable*) and the start date is likely to be 1 April 2025, with a requirement to run a minimum of three parallel payrolls ahead of then to support safe implementation.

We are seeking a payroll bureau service that provides clear reporting by school and employee type. Currently we have multiple payrolls (a payroll per academy) but would be open to the option of a single Trust payroll as long as there is provision for clear reporting by school and employee type.

The pay date in the Trust is the 25th of the month, or the working day before if 25th falls on a weekend or bank holiday, and we pay earlier in December.

Trust employees are members of Local Government Pensions Scheme (Leicestershire County Council administered) and Teachers Pension Scheme. We will be seeking a bureau that's capable of working with these pension schemes, as well as the ability to work with others in the future if required (e.g. providers of defined contribution pension schemes).

All academies use BromCom currently for recording HR contact details and absences, this is also used for the Workforce Census.

Any service offering must be able to adhere to the latest industry standard GDPR, Data security and Cyber security procedures.

As well as a payroll bureau service, in this tender exercise we would also like to obtain proposals relating to HR platforms/ information systems that can deliver efficiencies, such as employee self-service, as well as being able to integrate easily with BromCom and TMET's selected payroll bureau on a basis that's as close to real time as possible.

2   Objective of the ITT

The Mead Educational Trust invites qualified suppliers to submit proposals for a payroll bureau service and HR platforms/ information systems as detailed in this document. The objective is to select a provider that can offer a robust, compliant, cost-effective, and efficient solution that aligns with our goal of providing exceptional education and facilities to our students and staff.

The purpose of this ITT is to obtain professional, costed propositions and solutions for the required services.

Failure to comply with the instructions in this document may result in a bid not being considered.

3 Our requirements

We are looking for costed proposals from organisations providing a payroll bureau service and/or HR platform/ information systems. Ideally we would like to see proposals for both services and are receptive to joint bids from two organisations if necessary. If possible, costed proposals should be provided on the basis of modular or configurational optionality i.e. if there are multiple options for configuration of the offering, please set out a range of costing options based on opting for various options. Any additional costs must be specified in the proposal.

Expertise and proven credentials in the education sector are required and submissions unable to demonstrate this will be discounted. Three school or MAT references should be provided with each submission; along with evidence demonstrating sector expertise.

Costing proposals should also give a view of costing increase as pupil numbers increase and new academy's join the trust.

Key payroll requirements;

Configuration / parameterisation

- Ability to create configuration and/or parameters in the payroll process, for instance controlling inputs on the basis of burgundy/ green book rules, as well as our own trust policies.

Service standards

- Customer service, e.g. SLA for support, dedicated account and/or product manager. For instance, dedicated payroll assistants per payroll and a nominated team manager/ executive for swift escalation.

- Quality Assurance & controls, for example net pay calculation controls, National Minimum Wage thresholds (particularly where salary sacrifice deductions are present) and NI controls for colleagues over state pension age.

- Approval process, how we provide approval for payroll to be run and through what method

- Timings & flexibility, how far ahead of pay day will approvals be needed and how late can amendments to the payroll be made. Any costs related to additional payments, payroll runs or other related activities should be stated.

- Insurance, e.g. levels of cover and commitments in the case of detrimental incidents.

- Payslips to be available online to employees as a minimum.

Pension service

- Ability to work directly with third party pension providers on the trusts behalf, e.g. accessing Teacher Pensions Portal and liaising directly with them where necessary.

- Support for auto enrolment

    o Trust wide auto enrolment review (next deadline for the Trust is 1 Oct 2026)

    o Alerting when colleagues exceed the threshold for auto enrolment

- Regular pensions administration & regulatory requirements – monthly / yearly submissions (MCRs, EOYCs etc.) & membership admin, e.g. opt outs, opting for 50/50 scheme, opt ins etc.

- Support of administration of complex cases, e.g. Ill Health Retirements, Flexible Retirements

- Capability to work with defined benefit pension providers is desirable.

Capability for deduction schemes / pay overs

- Capability to support both net deduction & gross deduction schemes

- Administer payrolling of gross deductions and/or P11D process

- Actioning and maintaining AOEs, DEAs & Child support notices

Reporting capabilities

- Specify what's included in reports produced (e.g. breakdown of payments such as gross pay, PAYE, NI, Apprentice Levy, pension payments, salary sacrifices etc.) as standard before and after payroll runs, as well as at year end

- Capability to provide true cost reports. E.g. reporting to show true cost of statutory payments where 92% is government funded (e.g. SMP)

- Capability (and any cost applicable) to produce additional, adHOC and bespoke reporting

Pay over capability

- Capability to use bureau authority to make regular payments, e.g. net pay, HMRC payments, payments to third parties including pension providers and salary sacrifice scheme providers

Pay slips & key docs (P45s, P60s & P11Ds)

- Ability to provide pay slips & key docs, as a minimum electronically, preferably with notifications and paper optionality

Supporting statutory returns

- Gender pay gap

- ONS – monthly wage and salary survey; business register and employment survey

- Any others that become mandatory requirements over time or adHOC that become required for statutory returns over time

Statutory payments & contractual payments

- Ability to support with preparing schedules and making payments for statutory & contractual payments, e.g. Maternity, Paternity, Shared Parental, Sick pay etc.

MIS integration

- Must have capability for integration as close to real time as possible, via API or otherwise, with key MIS systems (TMET requirement is currently BromCom)

Sector experience

- Expertise and proven credentials in the education sector are required and submissions unable to demonstrate this will be discounted.

- Experience working with pension providers, including Local Government Pension Scheme and teachers Pensions Scheme.

Implementation approach

- Confirm what would be provided in terms of specialist personnel/ project management resource, as well as pre-existing training materials and process mapping/ frameworks.

- What support will be made available for end user training and testing.

- How would you ensure a smooth transition from our current payroll provider, please confirm number of parallel runs included and cost for additional.

- Confirm the approach and implications of onboarding new schools in the future, including timings and cost.

HR platform/ information system requirements *(please provide information of modular configuration optionality if possible, the below has been structured on the basis of typical modules but please propose on the basis of your own proposition)*;

Employee Management

- Capability to securely manage and store employee data centrally & enables creation of MI. E.g. are contract changes and updates made in an Employee Management system. From an MI perspective can reports be run to show key data, e.g. regularity of overtime, staffing structure changes etc.

- TMET be-spoke configuration of system/rules/parameters / working patterns

    o Integration with payroll bureau (via API or otherwise)

- Ability to manage & monitor employee leave and absences.

- Employee/Manager self service and where required approvals for:

    o Holidays

    o Overtime

    o Payslips / P45/P60

    o Personal data

    o Leave of absence

    o Sickness Management

    o Expenses

- Automated HR contract / paperwork production / workflows / approvals

- Establishment management, workflows and approvals

- SCR creation, management and reporting (school and trust wide)

MIS integration

- Must have capability for integration as close to real time as possible, via API or otherwise, with key MIS systems (TMET requirement is currently BromCom)

Recruitment & Applicant Tracking Systems

- Capability to automate and manage:

    o post approvals (either independently or through integration with employee management system)

    o vacancy publications, essential with e-teach and social media along with other routes

    o candidate applications, long and shortlisting

    o candidates management up to and including interview/post interview

    o Pre-employment checks

    o onboarding into payroll bureau / employee management system / SCR / bromcom in as close to real time as possible

Single Central Record

- System capability to produce a Single Central Record for each employee and provide Trust / school based reporting

- Ability to configure the SCR to meet current Trust format

School Workforce Census

- System capability to support School Workforce Census, for example collating data and making it ready for submission to DfE.

Case Management

- System capability to

    o Automate and manage workflows to manage informal and formal cases in line with TMET's HR polices and procedures

    o Ability to configure workflows to align with TMET's policy and procedures

    o Management information and reporting

Development, training & CPD

- Ability to manage employee development from end to end & employees to track / report on their progress.

- Options for reminders for staff (& line managers) of upcoming and/or overdue courses and reports for Compliance with training requirements.

Trust wide MI

- Capability to produce trust wide MI to inform strategic business decisions.

Other integrations

- Any other integration options, for example with budget planning software.

Please supply any other capability options not listed above that could be of interest.

4 General Instructions

These instructions are designed to ensure that all proposals are given equal and fair consideration.

- Proposals must be comprehensive, addressing all requirements as laid out in this ITT.

- Bidders are expected to adhere to the submission deadlines specified.

- The Trust reserves the right to accept any proposal in whole or in part and to award the contract to more than one bidder if deemed beneficial.

- Proposals must remain valid for a minimum of 90 days from the tender return date.

- **It is important that Bidders provide all the information requested**.

- The Mead Educational Trust will not be liable for or pay for expenses or losses that may be incurred by the Bidder in the preparation of the Bid.

- The Mead Educational Trust reserves the right to cancel the tender process at any point.

- A Bid received after the due date and time for submission will not be considered.

- The Mead Educational Trust does not bind itself to accept the lowest or any Bid.

- No Bid will be deemed to have been accepted unless such acceptance has been notified to the Bidder in writing.

- Recipients of the Bid documents (whether they submit a Bid or not) shall treat the details in it as private and confidential. Any Bid received by The Mead Educational Trust in response to the invitation to Bid shall be treated likewise by The Mead Educational Trust.

- Pease examine all the Bid documentation and ensure that you return all the information requested no later than **10/10/2024 @ 5pm**. Incomplete bids will be deemed to be non-compliant and eliminated from evaluation.

- In the event of declining to Bid, Bidders are requested to inform the The Mead Educational Trust.

- **Tenderers should note that the award of the contract is expected by 15/11/2024.**

Whilst the information in this document has been provided in good faith, it does not purport to be a comprehensive review of all matters relevant to the requirements and neither The Mead Educational Trust, nor any of its employees or advisers accept any liability or responsibility for its adequacy, accuracy or completeness, nor do any of them make any representation or warranty, express or implied, with respect to the information contained in this document. Nothing in this document is or should be relied upon, as a promise or representation as to The Mead Educational Trust's ultimate decision.

5   Tender Response

Actions required:

Tenderers to email gkirkham@tmet.uk by 26/09/2024 @ 12pm, if you intend to bid.

Tenderers to email any questions or clarifications using *Appendix A Questions and Clarifications Template* by 26/09/2024 @ 12pm.

6   Evaluation criteria

The Bid process will be conducted in a manner that ensures Bids are evaluated fairly to ascertain the most economically advantageous Bid using the following criteria:

Criteria	Weighting
Compliance with Technical & Regulatory Requirements	30%
Configuration & control capability	20%
Reporting & MI capability	20%
Service and Support	15%
Cost Effectiveness	15%
TOTAL	*100%*

Bidders should note that the overall weightings for each criterion are fixed. Details of criteria are:

6.1   Compliance with Technical & Regulatory Requirements – *Weighting 30%*

Bidders should clearly indicate their level of capability to meet the technical and regulatory requirements as detailed in this ITT. Including clearly detailing processes to deliver controls and mitigate risks.

6.2   Configuration & control capability – *Weighting 20%*

Bidders should detail ability to create configuration and/or parameters in the payroll and HR system processes, for instance controlling inputs on the basis of burgundy/ green book rules, as well as our own trust policies.

6.3   Reporting & MI capability – *Weighting 20%*

Bidders should be clear on reporting & MI capability, e.g. regularity of overtime, staffing structure changes etc.

6.4   Service and Support – *Weighting 15%*

Bidders are required to outline the service and support model that will be available, including SLAs and qualification details of individuals who will be providing support. Bidders are requested to provide details of two reference sites where the solution (or key elements of the solution) have been implemented in a similar size project.

6.5   Cost effectiveness – *Weighting 15%*

Bidders are required to provide fully costed proposals. If possible, costed proposals should be provided on the basis of modular or configurational optionality i.e. if there are multiple options for configuration of the offering, please set out a range of costing options based on opting for various options. Any additional costs must be specified in the proposal.

7   Evaluation of Bids

The evaluation process will be conducted to identify the most economically advantageous tender. Bids will be assessed to ascertain those that represent best overall value and the highest likely quality of output during the contract, not necessarily the lowest price submission.

Proposals will be evaluated by The Mead Educational Trust centrally, with a variety of roles on the evaluation board.

Scoring Definitions

Each criterion will be scored using the following definitions:

SCORE	DEFINITION
0	Absent or does not meet the criterion.
1	Response has some major shortcomings and/or clear deficiencies, which on balance outweigh positive aspects of the response to the criterion.
2	Response has minor shortcomings and/or deficiencies, but on balance these are outweighed by the positive aspects that meet the majority of the criterion.
3	The criterion is fully met in all areas.
4	The response meets all aspects of the criterion and goes beyond them, adding significant value in a number of areas.

8   Questions and clarifications

If you have any questions or points of clarification about the contents of the Bid document or the services that are to be provided, please contact TMET by emailing gkirkham@tmet.uk. TMET will respond to all queries by

using the template ***Appendix A Questions and Clarifications Template*** by the date shown below to all bidders for transparency.

The Mead Educational Trust will not answer any questions received via telephone and will not answer any questions received after this date. Any questions received will be answered and circulated to all Bidders, although The Mead Educational Trust will not disclose the identity of the Bidder who asked the question.

Clarifications deadline : 26/09/2024 @ 12pm   Clarification response deadline: 01/10/2024 @ 5pm

9   Completing Bids

Your bid should contain all of the required information outlined within this document, along with any further information you feel relevant to support your bid. Any comments pertaining to the information supplied by you may be made in an email and returned with the Bid. The Bidder Declaration (***Appendix B Bidder Declaration***) must be completed, signed and dated by a duly authorised representative on behalf of the Bidder.

10   Submission of Bid

Please submit one electronic copy of the completed Bid document by email to gkirkham@tmet.uk before **17:00pm** on **10/10/2024.**

The electronic bid submissions will be held securely and only viewed after the deadline date. Any electronic bids received after these dates and times will not be considered.

11   Timetable for Bid and award of Contract

The intended timetable is:

16/09/2024	Invitation to Tender document and associated documents issued to selected companies and uploaded to TMET website.
26/09/2024 @ 12pm	Tenderers to confirm intention to Bid
26/09/2024 @ 12pm	Tenderers submit questions and comments regarding Tender documents
01/10/2024 @ 5pm	The Mead Educational Trust responds to questions and comments via email to all Tenderers
10/10/2024 @ 5pm	Bidders submit Tender.
14/10/2024 – 01/11/2024	Selected Bidders invited to present following evaluation of Tenders and unsuccessful Bidders not invited to present will be notified
By 15/11/2024	Following TMET Executive approval - Appointment of Preferred Bidder and next steps agreed with Preferred Bidder. Unsuccessful Bidders will be notified.

12   Form of Response

Bidders are required to develop a costed solution.

Bidders are requested to use the weighting criteria to assess the suitable length of their responses per section.

Return proposals should include the following information in the Tender Response:

- Written responses to the requirements set out in this document.

- Bidder's contact details including: organisation name; contact name; postal address; telephone number; facsimile number; email address.

5   List of Appendices

Appendix A: Questions and Clarifications Template - TMET to complete for all bidders

Appendix B: Bidder Declaration - Bidder to complete