



Invitation to Tender

Payroll and HR Support Services

Part B: HR Services

May 2018

Introduction

The Meller Educational Trust (MET) is seeking to procure across its schools for:

- A common payroll provider; and
- An HR services support partner.

Potential bidders are asked to submit an expression of interest to the following email address, indicating whether you intend to bid for one or both services:

tracy.simmons@mellereducationaltrust.org

Bids will be welcome for one or both payroll and HR support services. MET is seeking to procure both simultaneously to come into effect from autumn 2018 as part of a wider review of HR and central services. For this reason, we are issuing the specifications together. Bidders should indicate in their bid if the services are separable, ie the Trust can appoint to one of the services. They should also indicate the financial and other benefits of appointing for both services. This document covers the HR service element of the procurement. A separate but complementary document, entitled Part A: payroll services, accompanies this document.

The timetable for submitting expressions of interest and for submitting bids are set out below.

Background

The MET is a multi-academy trust within the South Hertfordshire, Watford and Hillingdon areas. The contracting body will be the Meller Educational Trust, company number 06903310, based at 18 Colonial Way, Watford, WD24 4PT. The main contact for the purposes of this procurement is:

David Hughes

Director of Finance and Operations

The Trust currently consists two schools:

- Francis Combe Academy, Horseshoe Lane Watford and
- The Bushey Academy, London Road, Bushey

We currently employ 275 staff across the two schools and the small central core team.

This procurement also covers the following single academy trusts who are due to transfer into the MET during this calendar year. The HR and payroll services will be for the expanded Trust.

- Hertswood Academy, 130 staff, Cowley Hill, Borehamwood
- Harefield Academy, 107 staff, Northwood Way, Harefield
- Watford UTC, 30 staff, 18 Colonial Way, Watford

The final solution will cover all five schools and the Trust for a joint payroll and a single HR support service, as detailed in this specification.

In addition, we support Global Academy, Old Vinyl Factory, Blyth Road, UB3 1 HA under an umbrella trust arrangement, and they are seeking access to the HR service provision only. They will continue to provide their own, independent payroll and will not be a party to that service.

We anticipate that all schools will move to the new arrangements for September 2018, but we reserve the right to vary membership and timings to reflect the local circumstances, as well as to minimise risk and error. We will discuss timescales with the successful bidder as part of the

implementation process. For the duration of this contract, we may expand the Trust further. We will let this contract on the basis that other schools can be added on (at least) the same terms.

Part B: HR provision

We are seeking to establish a Trust-wide HR provision from September 2018 to cover all five schools. Our proposed model is a central HR director with strategic oversight of HR for the Trust, with representatives at each school to provide the face to face contact with staff. This will be resourced from within the Trust. The HR Director post is a new post that will be advertised shortly. Currently, each school operates its own policies, terms and conditions and HR, with each supported by an external provider. We are therefore seeking to consolidate and centralise HR to best meet our ongoing needs as a single entity and multi academy trust.

This tender is for the provision of the external HR services to support the Trust's development and delivery of HR services. Schools will no longer purchase their own retainer.

The service consists of two elements:

- A retainer support service for ad hoc support, primarily via the HR Director; and
- Project based support to establish a common and consistent framework of policies, procedures, terms and conditions for all Trust schools and staff.

Each school currently maintains its own terms and conditions, with autonomous HR provision supported by an external provider. With the development of the multi academy trust, and the additional schools joining, we have identified a need to:

- Develop a Trust wide HR structure and framework;
- Adopt a suite of Trust policies, procedures and standard documentation, such as Trust contracts for new staff from 1 January 2019 (subject to agreement)
- Conduct an audit of existing terms and conditions and undertake a needs analysis to understand the differences in terms and conditions and to inform the development of a consistent approach
- Engage stakeholders, including unions and staff, as appropriate

TUPE applies to all staff joining the Trust through the rebrokerage of the academies above.

We are seeking to appoint an HR partner to support therefore:

- The development of the suite of policies, procedures and standard documentation for January 2019
- To provide the services detailed in the annex from 1 September 2018 for an initial period of three years
- To support the review of pay and benefits with a view to determining next steps and, if appropriate, to support the implementation of those findings, including any consultation.

Bids are invited to cover the items above. Bidders should separately identifier the ongoing annual retainer cost for the duration of the contract.

Global Academy are seeking to be party to the service retainer, but not the comparison or converging policies. They currently have around 25 employees, having opened in September 2016. This number will increase as their student numbers grow.

Procurement timeline

Event	Date
Issue of ITT	14 May 2018
Briefing session	Monday 21 May at Francis Combe Academy
Return of tenders	5pm on 7 June ¹
Shortlisting	8 June
Presentation	14 June
Award of preferred bidder	By 22 June
Mobilisation from	25 June
Start date	1 September 2018

Potential bidders should send their expression of interest to the email contacts below, together with confirmation of whether they intend to attend the briefing session by 18 May. The briefing session will be held at 10am at Francis Combe Academy, Horseshoe Lane, Watford WD 25 7HW and will last approximately 1 hour.

All tender documents should be submitted by 5pm on Thursday 7 June. It is the responsibility of the tenderer to ensure that the tender is delivered, and delivered on time. The Trust will not undertake to consider late or incomplete submissions. The submission should be by email, although tenderers may also submit paper copies of any documents to the Director of Finance and Operations, MET, 18 Colonial Way, Watford WD 24 4PT.

Shortlisting will take place on 8 June, at which point up to 4 bidders will be invited to provide a presentation on 14 June before a preferred bidder is appointed. The Trust reserves the right to vary the timetable, and also is under no obligation to appoint a preferred bidder from this exercise.

Submission of tender

Tenders should be submitted by email to david.hughes@mellereducationaltrust.org, copied to tracy.simmons@mellereducationaltrust.org in accordance with the timetable above. Tenders for the provision of payroll should specifically identify:

- A total annual cost for the retainer
- The costs of the development work. This can be a fixed cost or an hourly or daily rate
- Any services that attract a separate charge, providing an indication of fees or hourly rates
- Any inflationary or other provisions for annual or periodic increases in fees
- Any assumptions in the costing proposal
- A clear indication of services provided as part of the fee
- Details of the systems used and the interface or portal access to the Trust, where applicable. Demonstration of this system may be made at the presentation stage
- The reports available to the Trust
- A nominated Trust contact point and a description of the support service provided

¹ Please note that schools have half term in the week commencing 28 May, and so responses to any questions submitted that week may be slower than during term time. We will endeavour to answer as quickly as possible.

- How you will seek to work with the Trust to support the development and integration of a common HR system
- How you will seek to work with the Trust to support the development and integration of a common pay and benefit system
- Corporate data to include company number, latest statutory accounts, and an indication of experience within the education sector
- References from two organisations, preferably educational institutions
- The measures you have taken to ensure you comply with the General Data Protection Regulations that come into effect in May 2018.
- Details of professional body membership, eg CIPD, or other accreditation for HR and employment law services

Tenderers should be aware that questions raised during the tender period, together with answers, will be circulated, unattributed, to all potential bidders who have expressed an interest in the procurement. Queries should be submitted via email to the contact named in the introductory paragraphs (Director of Finance and Operations for the Trust).

Tender evaluation

The tenders will be evaluated in accordance with the following criteria:

- Commercial pricing: 50 per cent
- Set up support for development of a common structure: 20%
- Proven track record with the needs of growing multi academy trusts: 5%
- Customer service provision: 20%
- Value added 5%

Tenders may be rejected if they do not comply with the tender specification or public sector procurement guidelines.

Contracting and invoicing

The Trust is seeking a three year contract, unless terminated or extended within the terms and conditions herewith. Bidders should price submissions accordingly.

The Trust is under no obligation to appoint a contractor from this exercise, and reserves the right not to appoint or to re-run the exercise. The Trust will not be liable for any bidder costs prior to appointment, including compilation of the submission.

Invoices should be sent to the Director of Finance at 18 Colonial Way Watford. Invoices for ad hoc work should clearly show the purchase order number and requester.

Termination

The contract may be terminated by either party by giving 6 months' notice.

The duration of the contract is for an initial period of three years (for the provision of support services across the Trust from 1 September 2018), and can be renewed for an additional one or two years at the Trust's discretion.

At the end of the contract, the contractor will provide all personal data in a timely manner to support transition to the new supplier, and continuity of HR functions.

Data Accuracy

The Trust acknowledges that it is responsible for the accuracy of data submitted to the service provider.

General terms

- Inducements – offering an inducement of any kind in relation to obtaining this or any other contract with the Trust will disqualify your tender from being considered and may constitute a criminal offence
- Applicable law – the contract is governed by English Law
- TUPE – there are no TUPE considerations within this service.
- Copyright – documents and templates provided to the Trust under this agreement for use in day to day HR provision will not be copyrighted by the provider, and can be used for Trust purposes beyond the expiry of the contract. The Trust undertakes not to provide the template documents to third parties.

Annex: Service specification

The Trust is seeking the following services:

- Telephone/email helpdesk to support the academy and central HR staff and senior Trust staff on HR related issues such as:
 - Support in absence management and return to work arrangements
 - Support with redundancies and restructures
 - Support with mediation and confliction resolution
 - Occupational Health support and guidance
 - Advice and support on employment law
 - Advice and support of Maternity & Paternity arrangements.
- Up to 10 site visits per years in support of Academy/Trust Meetings, Disciplinary, Tribunal or work related union meetings where independent HR representation/support may be needed
- Expertise in the education sector, with specific understanding of multi academy trusts
- Annual compliance check of HR documentation with the provision of advice and updates on employment and contract issues
- Production of Settlement Agreements as and when required.
- Support and guidance with regards to teaching and support staff job descriptions / job evaluations and associated pay and grading.
- Act as Trust DBS Umbrella Company for the management of Trust DBS' and Barred Checks – together with advice and legislation with regards to the Single Central Record.
- Support in grievance and disciplinary cases, as well as tribunal cases if necessary. This is to include casework management
- Guidance to support centralised HR staff keep up to date on employment and contract issues
- Update of LGPS portal for updates to employee details
- Support for wider HR issues such as tier 2 visa registration and applications, DBS checks, Right to Work in the UK, restructuring programmes, redundancies, TUPE transfers, union engagement
- Access to occupational health services.
- Support for TUPE and integration of the new schools joining this year
- Access to wider HR training²
- Access to HR document management that is GDPR compliant³
- Support in transferring academies into the Trust, including TUPE considerations and support with consultation
- Support with harmonisation of pay and policies post appointment, including advising on consultations and approaches
- Support the development of common documentation, including:
 - Policies
 - Contracts
- Support for implementation of a Trust HR system at the point we choose to pursue this option
- Support the development of HR strategy
- Support recruitment initiatives

² Bidders should provide details of complimentary training providing, and an indication of other training on offer

³ Bidders should provide cost details in their bid. The Trust makes no commitment to purchasing software.

- Support statutory returns and other returns to the Department for Education relating to workforce or HR

Where the services above, such as OH, are provided by third parties, you should indicate any mark up or administration charge levied.

The role of the new HR Director post within the Trust will include the following areas, and the HR provider will be expected to work with the postholder:

- Setting and overseeing the Trust's HR strategy
- Establishing policies and procedures for the Trust in HR and employment issues
- Oversight of HR provision in individual schools, acting as point of contact and reference. The expectation is that queries will be routed through the HR Director;
- Ensuring and monitoring compliance with employment and related law
- Management of external HR and payroll services contract
- Supporting schools in change management
- Union and stakeholder engagement
- Casework support
- Employee welfare and cross-Trust initiatives
- Recruitment and retention initiatives
- Statutory and statistical reporting
- Investigations, disciplinaries and related reviews
- Due diligence of new schools joining the Trust
- Development of systems
- Dissemination of good practice and employment law updates, including monitoring awareness and compliance
- Ensuring safer recruitment practices applied in schools
- Tier 2 visa applications
- Oversight of pre-employment checks and maintenance of HR records
- Exit and return to work interviews

Key performance indicators

The Trust is seeking the following performance indicators:

KPI	Acceptable Levels	
Availability of telephone/email helpline	24 hours a day throughout the year	Outside working hours for emergencies only
Satisfactory response to simple queries	4 hours	This relates to factual questions or queries that do not require additional information or research
Satisfactory response to a more complicated issue	24 hours where no casework is required	Where casework is required, the provider will meet any deadlines imposed by external governing agencies, such as courts, tribunals, DfE, ombudsman, law enforcement
Support for casework – attendance at meetings	With one week's notice ordinarily	
Provision of documentation for start of new academic year	1 July preceding the start of the academic year	

The contract will be managed at Trust level, and we seek quarterly review meetings to assess performance.