

**INVITATION TO TENDER
for the Provision of Multi-Academy Trust
Internal Scrutiny**

Opening Date:

Monday 11 February 2025

Closing Date:

Monday 28 April 2025
10am

Short List:

Friday 9 May 2025

Interview:

Monday 19 May 2025

Contact:

**Ashley Reed
Chief Financial Officer**

Ashley.reed@bdat-academies.org

01274 909120

Contents

1. Introduction
 2. Specification of Services Required
 3. The Tender Process
 4. Tender Requirements
 5. About the Personnel
 6. Internal Scrutiny Approach
 7. Internal Scrutiny Fees
 8. References
 9. Added Value
 10. Evaluation Criteria
 11. Contracting
 12. Termination of Contract
 13. General Terms
 14. Warnings & Disclaimers
 15. Freedom of Information
 16. Publicity
 17. Tenderer Conduct & Conflicts of Interest
 18. BDAT's Rights
- Appendix 1 – BDAT Trust Details
- Appendix 2 - Pricing Schedule

1. Introduction

Part 3 of the Academy Trust Handbook states the following:

All academy trusts **must** have a programme of internal scrutiny to provide independent assurance to the board that its financial and non-financial controls, and risk management procedures are operating effectively.

Internal scrutiny **must** focus on:

- **evaluating** the suitability of, and level of compliance with, financial and non-financial controls
- **offering advice and insight** to the board on how to address weaknesses in financial and non-financial controls
- **ensuring all categories of risk** are being adequately identified, reported and managed

The trust **must** identify on a risk-basis (with reference to its risk register) the areas it will review each year.

2 Specification of Services Required

The successful internal scrutiny partner will be expected to deliver the following services as a minimum:

- Produce an agreed strategic internal scrutiny plan for presentation and approval at the Risk and Audit Committee
- Produce an internal scrutiny plan for each area being reviewed
- Produce an annual internal scrutiny report and present at the Risk and Audit Committee.
- Produce recommendations following the internal scrutiny report to mitigate risk and/or make improvements
- Attendance at the Risk and Audit Committee.
- Review Finance areas annually
- Review all other areas on a 3-year rotation

Internal Scrutiny Areas for consideration:

- Finance Systems & Processes
- Safeguarding
- Policy and Regulation Compliance

- GDPR
- Health and Safety Compliance
- Procurement
- Risk Management
- Business Continuity Plans
- Estate Management
- Environmental Sustainability
- RPA / Insurance
- Induction and training
- Whistleblowing

Internal Scrutiny Areas out of scope due to 3rd party reviews already in place:

- Human Resources
- Cyber Security
- Education
- Governance

3. Tender Process

We are inviting firms to tender for the Internal Scrutiny appointment. This will be a 3 plus 2 years contract.

- Bids should be submitted by email to Ashley.reed@bdat-academies.org (CFO).
- Submissions received after the deadline will not be considered.
- Tenderers should ensure that they allow enough time to submit their bid response. **The Trust will accept no responsibility for difficulties during the process of submission and/or late or lost submissions.**
- Please study the documentation carefully. If you are in any doubt as to any aspect of the brief or require clarification of any part of the document, please contact Ashley Reed.
- Tenders will only be considered if they provide competitive prices strictly in accordance with the brief.
- There will be a short-listing process and applicants will receive an email the day after the meeting inviting them to present to the panel or informing them that they have been unsuccessful

- Interviews will take place as at the date on page 1. Details of how the interview process will be coordinated will be communicated.

4. Tender Requirements

- Briefly outline your firm/company's credentials to undertake Internal scrutiny on behalf of Bradford Diocesan Academies Trust
- Demonstrate your firm/company's experience of internal scrutiny of:
 - Multi-Academy Trusts
 - Academies and independent schools
 - Other education establishments
 - Companies with charitable status
- Budget available £50k - £75k for a 3 year plus 2 year contract

5 About the Personnel

- Please specify the senior personnel who would be assigned to do the internal scrutiny and their work base/office location – please provide a simple team organisation structure.
- Please specify how the firm's relevant experience of the sector will be brought to bear on the Trust's internal scrutiny.

6.0 Internal Scrutiny Approach

Please detail your companies approach to leading and managing internal scrutiny including:

- Basic approach to the internal scrutiny and timing,
- Key features of any internal scrutiny for the academies
- What is expected of the Trust
- Method of reporting to Trustees and senior leaders
- Please provide a statement confirming the lack of conflicts of interest and relationships with the Trustees and Executive Staff.

7.0 Internal Scrutiny Fees

- Please complete the attached Pricing Schedule (**Appendix 2**) and confirm that fees quoted are fixed and inclusive of expenses and disbursements for the first full year.
- Please confirm your approach to any inflationary price changes in the second and subsequent years as per the schedule provided.

8.0 References

- Please give names and addresses of two referees in the education sector, one of which should be a Multi-Academy Trust if possible.

9.0 Added value

- Please give details of any other support/services provided to clients designed to add value to your relationship

10. Evaluation Criteria

- All of the tenders will be subject to a detailed evaluation process which will be based on an appropriate balance between technical expertise and a firm commitment to meeting all of the Trust's requirements. The Trust will select the best value for money tender (using a price: quality ratio of 60:40) considering the following factors:

Criteria	% Weighting	
Commercial Pricing	50%	
Expertise of Internal Scrutiny's Staff	40%	
Added Value Services	10%	
	100%	

NOTE: the above criteria are not listed in relative order of importance.

- The Trust shall be under no obligation to accept the lowest or any tender submitted hereunder.
- The Trust may request additional information as part of the bid clarification process to enable the Trust to better understand the Tenderer's bid.
- Tenders may be rejected if they do not comply with the tender specification or public sector procurement guidelines.
- A maximum of the top three scoring tenderers will be invited to deliver a presentation to representatives of the Trust in support of their tenders, as set out in the Timetable (which will

be communicated if successful). Tenderers should keep this date free in case they are asked to attend.

- The presentations will be used to moderate the written submissions for the evaluation criteria specified above.
- The names and positions of those attending from the Trust will be notified to all tenderers in advance of the presentation.

11. Contracting

- The Trust is seeking a 3 plus 2 year contract, unless terminated or extended within the terms and conditions herewith. Tenderers 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 tenderer costs prior to appointment, including compilation of the submission.
- Details of the policy on price changes in future years should be included (e.g., price plus inflation, RPI, CPI etc.)

12. Termination of Contract

- 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 and then by agreement extended for a further 2 years

13. General terms

- Inducements – offering an inducement of any kind in relation to obtaining this or any other contract with the Trust will disqualify the tender from being considered and may constitute a criminal offence.
- Data breaches – the contractor must inform the Trust of any data breach as soon as reasonably practicable and in any event within 12 hours of occurrence, the data compromised, and actions taken to limit the exposure. This should include details of staff affected where known.
- Applicable law – the contract is governed by English law. There are no TUPE considerations within this service.

14. Warnings and disclaimers

- While the information contained in this ITT is believed to be correct at the time of issue, neither the Trust nor its advisors will accept any liability for its accuracy, adequacy or completeness, nor will any express or implied warranty be given. This exclusion extends to liability in relation to any statement, opinion or conclusion contained in or any omission from, this ITT and in respect of any other written or oral communication transmitted (or otherwise made available) to any tenderer. This exclusion does not extend to any fraudulent misrepresentation made by or on behalf of the Trust.
- If a tenderer proposes to enter into a contract with the Trust, it must rely on its own enquiries and on the information contained within this ITT, subject to the limitations and restrictions specified in it. 8.3 Neither the issue of this ITT, nor any of the information presented in it, should be regarded as a commitment or representation on the part of the Trust (or any other person) to enter into a contractual arrangement.

15. Freedom of Information

- As a public body, the Trust is subject to the provisions of the Freedom of Information Act 2000 (FOIA) and Environmental Information Regulations 2004 (SI 2004/3391) (EIR) in respect of information it holds (including third party information). Any member of the public or other interested party may make a request for information. The Trust is also subject to various public sector transparency policies and legal requirements.
- Tenderers should therefore be aware that information provided in connection with this procurement, or in connection with any contract awarded, may be disclosed by the Trust, unless the Trust decides (in its absolute discretion) that one of the statutory exemptions under the FOIA or the EIR applies. Requests for information and application of any exemptions shall be considered on a case-by-case basis. By taking part in this procurement, tenderers agree to such disclosure or publication by the Trust.
- Tenderers may designate any information supplied as part of their tender response or otherwise in connection with the procurement as confidential or commercially sensitive by clearly identifying it as such to the Trust in its response. Blanket protective markings applied to the whole document will not be sufficient. While designating material as confidential or commercially sensitive or equivalent does not guarantee non-disclosure, the Trust will consider this as part of any disclosure decision.

16. Publicity

- No publicity regarding the tender for services of Bradford Diocesan Academies Trust or the award of any contract will be permitted unless and until the Trust has given express written consent to the relevant communication. For example, no statements may be made to the media regarding the nature of any tender, its contents or any proposals relating to it without the prior written consent of the Trust.

17. Tenderer conduct and conflicts of interest

- Any attempt by tenderers or their advisors to influence the contract award process in any way may result in the tenderer being disqualified. Specifically, tenderers shall not directly or indirectly at any time:
- Devise or amend the content of their tender in accordance with any agreement or arrangement with any other person, other than in good faith with a person who is a proposed partner, supplier, consortium member or provider of finance.
- Enter into any agreement or arrangement with any other person as to the form or content of any other tender, or offer to pay any sum of money or valuable consideration to any person to effect changes to the form or content of any other tender.
- Enter into any agreement or arrangement with any other person that has the effect of prohibiting or excluding that person from submitting a tender.
- Canvass the Trust or any employees or agents of the Trust in relation to this procurement.
- Attempt to obtain information from any of the employees or agents of the Trust or their advisors concerning another tenderer or tender.
- Tenderers are responsible for ensuring that no conflicts of interest exist between the tenderer and its advisers, and the Trust and its advisers. Any tenderer who fails to comply with this requirement may be disqualified from the procurement at the discretion of the Authority.

18. Bradford Diocesan Academies Trust reserves the right to:

- Waive or change the requirements of this ITT from time to time without prior (or any) notice being given by the Trust.
- Seek clarification or documents in respect of a tenderer's submission.
- Disqualify any tenderer that does not submit a compliant tender in accordance with the instructions in this ITT.
- Disqualify any tenderer that is guilty of serious misrepresentation or of negligently providing misleading information in relation to its tender or the tender process.
- Withdraw this ITT at any time, or to re-invite tenders on the same or any alternative basis.

- Choose not to award any contract or lot as a result of the current procurement process.
- Make whatever changes it sees fit to the timetable, structure or content of the procurement process, depending on approvals processes or for any other reason.

APPENDIX 1

Bradford Diocesan Academies Trust details

- c/o Address 2nd Floor Jade Building, Albion Mills,
Albion Road, Bradford BD10 9TQ
- Main switchboard: 01274 909120
- Company no. 08258994
- Date of Incorporation. 12 October 2012
- Chief Executive Officer Carol Dewhurst OBE
- Chief Financial Officer Ashley Reed
- Staff c1600 full and part time
- Academies Primary 16 Secondary 5
- Accounting Period 1st September to 31 August
- Accounting system Sage Intacct
- Payroll Provided by Working with Schools Limited
- Funding Forecast annual income for 2024/25 is £90 million
- Capital Funding Capital c£1.4m

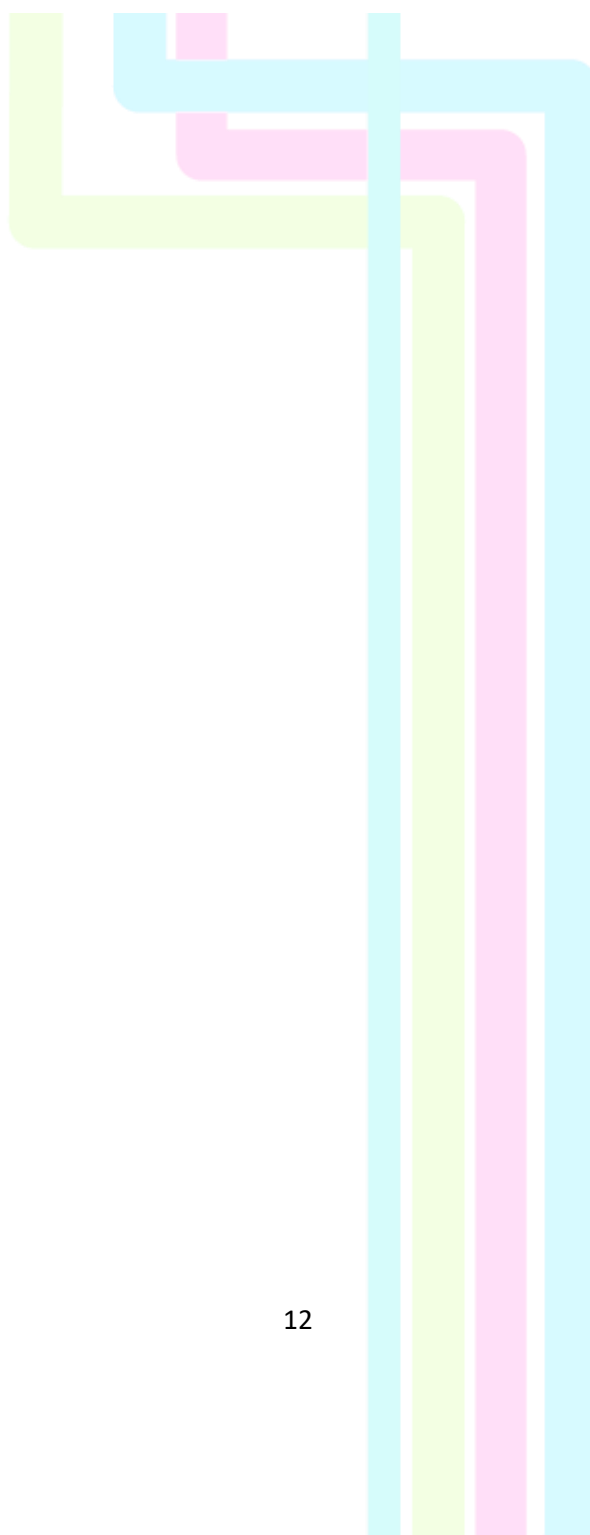
Bradford Diocesan Academies Trust (BDAT) was set up in 2012 to support and sponsor Church of England Academies and other schools in Bradford and the surrounding areas on behalf of the Diocese of Leeds. We work with our schools to provide a network of support and challenge, so working together we can achieve our vision of improved outcomes and results for our children and young people.

Our mission is “At BDAT we want every child to have a happy and high-quality education enabling them to grow and flourish during their time at school.”



We encourage an understanding of the meaning and significance of faith, the added experience and learnings of Christian values can offer to the development of all our pupils' education and personal lives. We also seek to be an employer of choice in Bradford as we know we can't have great schools without great staff.

Further information is available on website: [About BDAT - Bradford Diocesan Academies Trust \(bdat-academies.org\)](http://bdat-academies.org)



APPENDIX 2

Pricing Schedule

Fees: (20+ schools) (all prices are inclusive of Management meetings, attending Risk and Audit Committee)	2025/26 £	Comments/further information (incl policy on price changes in future years)

Fees should be exclusive of VAT but inclusive of expenses and disbursements