# **A picture containing icon Description automatically generatedUser Guide for Management Information Systems (MIS) and Financial Information Systems (FAS) in Educational Establishments Framework**

## FRAMEWORK AGREEMENT TERM: 6th June 2023 – 31st March 2027

## FRAMEWORK REFERENCE NUMBERS: FTS: 2023/S 000-031652

# INTRODUCTION:

1.

* 1. This document is aimed at providing educational establishments and other Local Authorities with guidance in relation to the use of North Yorkshire Council’s MIS and FAS Framework Agreement.

# ACCESSING THE FRAMEWORK:

* 1. This framework agreement is available to all Local Authorities within England and Wales. A list of all the relevant English Local Authorities may be found at: [Council in England](https://assets.publishing.service.gov.uk/media/6401d6a6d3bf7f25f813fc3a/List_of_councils_in_England_2023.pdf) and a list of the Welsh Local Authorities may be found at: [Welsh Local Authorities](https://law.gov.wales/local-government-bodies).
  2. Alongside this the framework agreement is available for use by all educational establishments throughout England and Wales. These schools include LA maintained, free schools, faith schools, Pupil Referral Units, Special Schools, Academies and Multi Academy Trusts. A list of all these schools may be found at: [Full List of Schools](http://www.get-information-schools.service.gov.uk). Please note that at this time this framework agreement is only available to educational establishments within the remit of the public sector.
  3. For the purpose of this document establishments detailed within 2.1 and 2.2 are referred to as Customers.

# Framework Term:

3.

* 1. This framework agreement commenced on 6th June 2023 and will expire on 31st March 2027. In order to provide flexibility to Customers, call off contracts may be entered into for a maximum period of three years on or before the expiry of the framework agreement.
  2. If a customer doesn’t wish to commit to a maximum three-year term, then options are available for a one- or two-year contracts with an additional extension period to take them up to a three year maximum term.
  3. For example, a call off contract could be awarded for: two years with an additional year extension to create a three year contract.

# Scope:

4.

* 1. All of the lots which include the provision of a Management Information System (MIS) meet the requirements set by the DfE for the transfer of data between schools as is defined at: [Common Transfer File](https://www.gov.uk/government/collections/common-transfer-file).
  2. All the lots which include the provision of a Financial Administration System (FAS) include a ‘core’ offering to support the purchase ordering process, a reporting module, export VAT documents and management of multiple local bank accounts using a central fund.
  3. In addition to the core offering, suppliers offer additional modules which schools may request in order to enhance their MIS or FAS. Additional modules and costs will differ per supplier so your requirements must be clearly stated within your specification of requirements.
  4. The framework has twelve lots which have been spilt in order to meet the requirements of both primary and secondary schools. Please see the list below:
* Lot One - MIS with support from an Accredited Support Provider (e.g. NYES Digital) for Primary Schools.
* Lot Two - MIS with support from an Accredited Support Provider (e.g. NYES Digital) for Secondary Schools.
* Lot Three - MIS with support from the Supplier for Primary Schools.
* Lot Four - MIS with support from the Supplier for Secondary Schools.
* Lot Five - FAS support from an Accredited Support Provider (e.g. NYES Digital) for Primary Schools.
* Lot Six – FAS with support from an Accredited Support Provider (e.g. NYES Digital) for Secondary Schools.
* Lot Seven - FAS support from the Supplier for Primary Schools.
* Lot Eight - FAS with support from the Supplier for Secondary Schools
* Lot Nine - MIS & FAS support from an Accredited Support Provider (e.g. NYES Digital) for Primary Schools
* Lot Ten - MIS & FAS from an Accredited Support Provider (e.g. NYES Digital) for Secondary Schools
* Lot Eleven - MIS & FAS with support from the Supplier for Primary Schools.
* Lot Twelve - MIS & FAS with support from the Supplier for Secondary Schools.
  1. You are required to include which lot you plan on utilising on your specification of requirements, and the call off contract between yourself and the supplier.

## CALLING-OFF FROM THE FRAMEWORK AGREEMENT:

5.

* 1. **Direct award is not permitted via this Framework Agreement. All call off contracts are required to be made via a further competition.**
  2. All suppliers appointed to the required lot must be invited to participate to the further competition. For a full list of the suppliers available per lot please see list below - Please also see Appendix 1
  3. Customers must evaluate all suppliers who have responded to the further competition using the criteria laid out below:

|  |  |
| --- | --- |
| **Criteria** | **Weighting** |
| Ability to deliver the project, data migration and training within the LA/ school’s specified timescales | 30% |
| Quality score (this score is carried through from the evaluation by North Yorkshire Council – Please see Appendix 1 for details) | 15% |
| Technical functionality | 15% |
| Whole life cost over period of call-off | 40% |

* 1. Customers may further sub-divide the above evaluation criteria provided they are transparent with their scoring of each of the questions. For example, a customer may sub-divide the first element in the table above, “Ability to deliver the project, data migration and training within the specified timescales”, into three other aspects. Each aspect will have a question and a mark. The sum of those marks cannot exceed or be less than 30%. This will apply to each of the areas in the above table.
  2. When conducting a further competition Customers are required to share:
  3. a specification of their requirements.
  4. the call off contract with the inclusion of Schedule 9 – The Guarantee if one is required by the customer.
  5. Clear details of how you will evaluate the suppliers including a breakdown of all the weightings used.
* Details of your indictive timescales for suppliers to send the responses, commissioners to evaluate them and a response send to suppliers.
* Once you have evaluated all the suppliers who responded to your further competition, it is good practice to notify the suppliers on if they have been successful or not.
* Once all suppliers have been notified the call off contract should be completed sent to the successful supplier for signature. They will then return this document to yourselves to sign.

## Suppliers Available Per Lot:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier:** | **Bromcom Computers PLC**  **“Bromcom MIS & FAS”** | **Arbor Education Partners Group Ltd**  **“Arbor MIS”** | **Histon House Ltd**  **“ScholarPack MIS”** | **Schools Educational Software Ltd.**  **“Integris MIS -Arbor Finance FAS”** |
| **Lot 1** | Tick outline | Tick outline | Tick outline | Tick outline |
| **Lot 2** | Tick outline | Tick outline |  | Tick outline |
| **Lot 3** | Tick outline | Tick outline | Tick outline | Tick outline |
| **Lot 4** | Tick outline | Tick outline |  | Tick outline |
| **Lot 5** | Tick outline |  |  | Tick outline |
| **Lot 6** | Tick outline |  |  | Tick outline |
| **Lot 7** | Tick outline |  |  | Tick outline |
| **Lot 8** | Tick outline |  |  | Tick outline |
| **Lot 9** | Tick outline |  |  |  |
| **Lot 10** | Tick outline |  |  |  |
| **Lot 11** | Tick outline |  |  |  |
| **Lot 12** | Tick outline |  |  |  |

Below are the quality scores, which should be carried through. Please see Appendix 1

## Benefits of using a framework:

All our suppliers have been pre-qualified for use within your establishment therefore, you have a guarantee that suppliers are all:

* Systems will work fully on at least one of the following operating systems: Windows, Android, MAC OS and Chrome.
* MIS Lots will allow customers to turn off API integration.
* All upgrades are included within the initial pricing, this includes both bug fixes and standard upgrades.
* FAS lots allow all reports to be exported to Excel in ‘raw’ (e.g. CSV).
* The Framework has been procured compliantly under the relevant public procurement legislation to support a reduction in your procurement timescales and reduce the risk within your organisation.
* All terms have been drafted with public sector organisations requirement in mind and have been pre-agreed with the suppliers.

**Appendix 1 – Quality Scores for use within mini competitions.**

The below should be used in conjunction with all the call off criteria provided in the table below. Every supplier on the customers chosen lot should be invited to complete a mini competition based on the below criteria.

|  |  |
| --- | --- |
| **Criteria** | **Weighting** |
| Ability to deliver the project, data migration and training within the Customers specified timescales | 30% |
| Quality score (this score is carried through from the score obtained as part of the framework level evaluation) | 15% |
| Technical functionality | 15% |
| Whole life cost over period of call-off | 40% |

Lot 1 - Management Information System with support from an accredited support team for Primary Schools.

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| --- | --- |
| **Supplier** | **Quality Weighting** |
| Arbor Education Partners Group Ltd | 13.96% |
| Bromcom Computers PLC | 12.12% |
| Histon House Ltd | 12.30% |
| Schools Educational Software Ltd | 9.85% |

Lot Two - Management Information System with support from an accredited support team for Secondary Schools.

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| --- | --- |
| **Supplier** | **Quality Weighting** |
| Arbor Education Partners Group Ltd | 14.02% |
| Bromcom Computers PLC | 11.71% |
| Schools Educational Software Ltd | 13.40% |

Lot Three - Management Information System with support from the Supplier for Primary Schools.

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| --- | --- |
| **Supplier** | **Quality Weighting** |
| Arbor Education Partners Group Ltd | 13.96% |
| Bromcom Computers PLC | 12.94% |
| Histon House Ltd | 11.96% |
| Schools Educational Software Ltd | 10.24% |

Lot Four - Management Information System with support from the Supplier for Secondary Schools.

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| --- | --- |
| **Supplier** | **Quality Weighting** |
| Arbor Education Partners Group Ltd | 14.02% |
| Bromcom Computers PLC | 11.42% |
| Schools Educational Software Ltd | 13.55% |

Lot Five - Financial Accounting System with support from an accredited support team for Primary Schools.

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| --- | --- |
| **Supplier** | **Quality Weighting** |
| Bromcom Computers PLC | 11.65% |
| Schools Educational Software Ltd | 13.77% |

Lot Six - Financial Accounting System with support from an accredited support team for Secondary Schools.

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| --- | --- |
| **Supplier** | **Quality Weighting** |
| Bromcom Computers PLC | 10.39% |
| Schools Educational Software Ltd | 13.77% |

Lot Seven - Financial Accounting System with support from the Supplier for Primary Schools.

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| --- | --- |
| **Supplier** | **Quality Weighting** |
| Bromcom Computers PLC | 12.25% |
| Schools Educational Software Ltd | 13.77% |

Lot Eight - Financial Accounting System with support from the Supplier for Secondary Schools.

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| --- | --- |
| **Supplier** | **Quality Weighting** |
| Bromcom Computers PLC | 10.53% |
| Schools Educational Software Ltd | 13.54% |

The following lots are single supplier lots and therefore, quotes should only be obtained from **Bromcom Computers PLC:**

* Lot Nine - Management Information System & a Financial Accounting System with support from accredited support team for Primary Schools.
* Lot Ten - Management Information System & a Financial Accounting System with support from accredited support team for Secondary Schools.
* Lot Eleven - Management Information System & a Financial Accounting System with support from the Supplier for Primary Schools.
* Lot Twelve - Management Information System & a Financial Accounting System with support from the Supplier for Secondary Schools.