

Payroll Service

Invitation to tender

The Mast Academy Trust

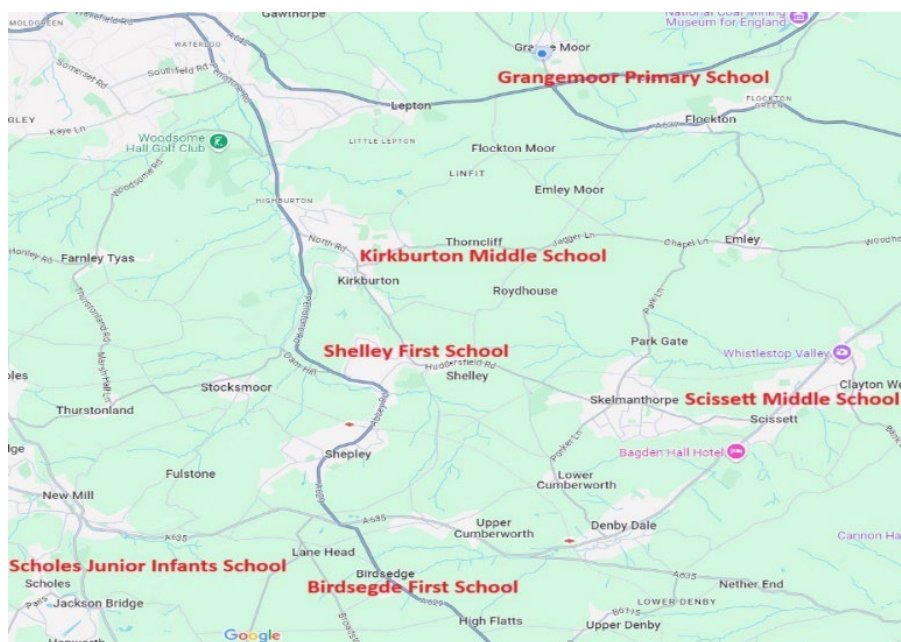


SECTION 1

1. Introduction

The Mast Academy Trust is seeking to review the provision of our payroll services to ensure best value for money.

The MAST Academy Trust was established in December 2016 to build upon strong, existing partnerships around the pupils and families in our locality through academy status. The Trust currently comprises of five schools consisting of Birdsedge First School, Shelley First School, Scholes Junior and Infant School, Kirkburton Middle School and Scissett Middle School with approximately 1500 pupils across the 4-13 years age range and 200 employees across all schools and the central Trust team. All schools are located within 15 minutes drive of each other.



We are a collaborative Trust, with all leaders supporting the development of MAST within the context of an Executive Leadership Team. Working strategically together we aim to transform provision and outcomes for pupils and their families.

Our vision for our pupils, staff and schools at the Mast Academy Trust is not defined by a statement but a set of key principles; principles that when united reveals our overarching vision. As individual schools and a Trust:

- We celebrate **individuality**
- We **collaborate** for the good of our children and staff
- We **inspire** our children, and our employees to **achieve** their ambitions
- We all **learn** from our experiences
- We ensure a **safe** and **caring** environment for everyone

We commit to:

- Put the **children** at the heart
- Value all our **people** and respect their well-being
- Serve the **community** around us
- **Respect** different opinions and then unite together
- Be willing to **challenge** and accept challenge
- **Support** all areas within the MAST Academy Trust
- Adhere to the Nolan Principles

2. Our Schools

Birdsedge First School – A First School serving pupils in Reception to Year 5 with a capacity of 90 pupils.

Kirkburton Middle School – A Middle School serving pupils in Year 6 to Year 8 with a capacity of 501 pupils.

Scissett Middle School – A Middle School serving pupils in Year 6 to Year 8 with a capacity of 600 pupils.

Scholes Junior and Infant School – A Primary School serving pupils in Reception to Year 6 with a capacity of 210 pupils.

Shelley First School – A First School serving pupils in Reception to Year 5 with a capacity of 180 pupils.

Associate School

Grange Moor Primary School – A Primary School serving pupils in Reception to Year 6 with a capacity of 105 pupils.

Our colleague population comprises teachers, teaching support staff, technicians, cleaners, lunchtime support, business support, site operatives, all of whom work a variety of working hours, sometimes employed in multiple roles to different working patterns from term time only, term time plus days/weeks to 52 weeks per year. We have colleagues based in all sites as well as our central trust team.

There are currently c.200 employees in the Trust and the gross monthly salary value is c.£150k. The Trust has a growth strategy, which means these figures are likely to increase over the coming years.

3. Procurement Best Practice Criteria

The Mast Academy Trust have agreed a set of best practice principles in relation to the procurement of this service. These principles provide a framework to ensure that we act in an ethically and commercially responsible way in our contractual arrangements. Adhering to these principles is an integral part of the procurement process for the Mast Academy Trust.

The Trust will:

- seek value for money for its pupils;
- harness the capability, diversity and innovation of our suppliers to add value to the Trust;
- adhere to a procurement process which is equitable, lawful and compliant with regulations;
- work with suppliers to ensure goods and services that we buy are made or executed in a socially and environmentally responsible manner;
- seek to be easy to do business with in order to minimise costs, risks and time;
- ensure the confidentiality of information in line with regulations;

SECTION 2

1. Scope of Work

The contract duration will be **three** years (with the option to extend by one year) and the start date is likely to be 1 April 2026, with a requirement to run a minimum of three parallel payrolls ahead of then to support safe implementation.

We are seeking either a:

- Outsourced payroll bureau service (External payroll processing and services), or;
- Payroll bureau (A payroll bureau that acts as an intermediary, providing software and support for the Trust to manage their payroll).

The Trust is seeking a payroll solution for all its schools that is able to provide wide-ranging functionality and reporting alongside the ability to deliver accuracy in payments to our people and make payments to other agencies associated with payroll processes. This will be alongside excellent customer support and rapid query resolution to help our team deliver to our colleagues.

The pay date in the Trust is the 15th of the month, or the working day before if 15th falls on a weekend or bank holiday.

Colleagues are members of Local Government Pensions Scheme (West Yorkshire Pensions administered) and Teachers Pension Scheme. We will be seeking a solution 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).

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 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 the Trust's Management Information systems selected payroll bureau on a basis that's as close to real time as possible.

2. Our requirements

We are looking for costed proposals from organisations providing a payroll service (outsourced and/or payroll bureau) and a module costed proposal for 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 school'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, e.g. net pay calculation controls, National Minimum Wage thresholds (particularly where salary sacrifice deductions are present) and NI controls for colleagues over state pension age.
- Intuitive and efficient approval process
- Clear payroll schedule with flexibility to adjust to meet the needs of the Trust, e.g. ability to flex payroll approval if required. Include 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 Trust's behalf, e.g. accessing Teacher Pensions Portal and liaising directly with them where necessary
- Support for auto enrolment
 - Trust wide auto enrolment review
 - 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

- Support both net deduction & gross deduction schemes
- Administer payrolling of gross deductions and/or P11D process
- Actioning and maintaining Attachment of Earnings Orders (AEO), Direct Earnings Attachment (DEA) & Child support notices
- Support other deductions as required e.g. salary sacrifice schemes.

Reporting capabilities

- Reports production (e.g. breakdown of payments such as gross pay, PAYE, NI, Apprentice Levy, pension payments, salary sacrifices etc.) before and after payroll runs, as well as at year end
- Starter, leaver and amendments reporting
- 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, ad HOC and bespoke reporting
- Audit functionality to allow for scrutiny of system changes
- Leave of absence reporting including cost impact, % or absence, working hours lost
- Benchmarking capability and salary calculation capability e.g. executive pay and headteacher pay
- Journal production for Trust finance system (Access Finance)

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
- Office of National Statistics (ONS) – monthly wage and salary survey; business register and employment survey
- Any others that become mandatory requirements over time or ad HOC 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, phased return etc.

- Ability to support salary calculations for part time teachers, term time workers, and casual loading for casual workers.

Systems integration

- Must have capability for integration as close to real time as possible, via API or otherwise, with key MIS systems (the Trust requirement is currently Arbor)
- Must have capability for integration as close to real time as possible, via API or otherwise, with key finance systems (the Trust requirement is currently Access Finance)

Sector experience

- Expertise and proven credentials in the education sector are required
- Experience working with pension providers, including Local Government Pension Scheme and teachers Pensions Scheme

Implementation approach

- Provide specialist personnel/ project management resource, as well as pre-existing training materials and process mapping/ frameworks
- Support for end user training and testing
- Ensure a smooth transition from our current payroll provider (confirm number of parallel runs included and cost for additional).
- 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 for each of the below 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.
- MI reporting capability to show key data, e.g. regularity of overtime, staffing structure changes etc.
- Bespoke configuration of system/rules/parameters / working patterns
 - Integration with payroll bureau and MIS system (via API or otherwise)
- Ability to manage & monitor employee leave and absences.
- Annual leave management including leave tracker and calculator. Leave calendar to have the functionality to display for overall function, department and colleague level.
- Employee/Manager self-service and where required approvals for:
 - Holidays
 - Overtime
 - Payslips / P45/P60
 - Personal data
 - Leave of absence
 - Sickness Management
 - Expenses
- Automated HR contract / paperwork production / workflows / approvals
- Establishment management, workflows and approvals
- SCR creation, management and reporting (school and trust wide) or ability to integrate with SCR hosted on MIS
- Capability for integration as close to real time as possible, via API or otherwise, with key MIS systems (currently Arbor)
- Capability to support electronic signature of documentation

Recruitment & Applicant Tracking Systems

- Capability to automate and manage:
 - post approvals (either independently or through integration with employee management system)

- vacancy publications, essential with e-teach and social media along with other routes
- candidate applications, long and shortlisting
- candidates management up to and including interview/post interview
- Pre-employment checks including, but not limited to, appropriate DBS, online ID checks and online right to work.
- onboarding into payroll bureau / employee management system / SCR / Arbor in as close to real time as possible
- Capability to support electronic signature of documentation

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.
- Capability for integration as close to real time as possible, via API or otherwise, with key MIS systems (currently Arbor)

Case Management

- System capability to:
 - Automate and manage workflows to manage informal and formal cases in line with the Trust's HR policies and procedures
 - Ability to configure workflows to align with the Trust's policy and procedures
 - Management information and reporting
- Capability to support electronic signature of documentation

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.
- Capability to support electronic signature of documentation

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.

3. Mandatory Criteria

The questions within this section are scored as Pass or Fail. Failure by the Tenderer to meet any of the mandatory criteria and/or submit any information requested will usually mean failure to be awarded the contract and could mean that the tender is dismissed without the evaluation being completed.

The following factors will be taken into account in assessing a supplier's suitability. Please provide confirmation of compliance, including any supporting documentation within your submission:

MC1. Insurance

All suppliers should carry insurance and as a matter of course, an appropriate level of public liability insurance.

MC2. Health & Safety

All relevant Health & Safety documentation e.g. safe working practices, risk assessments should be made available as part of the procurement process.

MC3. Safety and Security

An awareness of, respect for and ability to meet safety and security aspects such as safe recruitment checks on your staff.

MC4. Capacity/Capability

Deliver capacity and capability to fulfil the requirements. Please confirm if there are any future organisation restructures, mergers, or organisation difficulties

MC5. Accreditations or Professional Standards

We will want to assure ourselves that where these are appropriate these are current and that you have not been charged with any grave professional misconduct.

MC6. Compliance with Employment Legislation

Adherence to relevant employment legislation including, but not limited to, the Equality Act 2010, The Worker Protection (Amendment of Equality Act 2010) Act 2023 ,Employment Rights Act 1996, the Income Tax (Earnings and Pensions) Act 2003, the National Insurance Contributions Act 2015, the Part-Time Workers (Prevention of Less Favourable Treatment) Regulations 2000, the Agency Workers Regulations 2010, and the National Minimum Wage Act 1998.

MC7. Legal Considerations

Our contracts require that suppliers comply with all other applicable laws and regulations.

MC8. Data

Any data processing you undertake on behalf of the Trust must adhere to current GDPR regulations.

MC9. Sector expertise

Expertise and proven credentials in the education sector are required.

SECTION 3

1. 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 up to the award of the contract .
- It is important that Bidders provide all the information requested.
- The Mast Academy 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 Mast Academy 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 Mast Academy 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 Mast Academy Trust in response to the invitation to Bid shall be treated likewise by Mast Academy Trust.
- Please examine all the Bid documentation and ensure that you return all the information requested no later than 28th August 2025 at 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 Mast Academy Trust.
- Tenderers should note that the award of the contract is expected by 6th October 2025.

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 Mast Academy 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 Mast Academy Trust's ultimate decision.

2. Tender response

Bids should be submitted in accordance with the above scope of work. Prices / costs are to be submitted inclusive of Value Added Tax (VAT), detailing the exclusive of VAT price / cost and any VAT (detailing the rate applied) that may be applicable as a separate figure / column.

All information should be submitted to Melanie Humphreys via email at procurement@themast.co.uk by the closing date detailed below:

Stage / Activity	Indicative Date (subject to change)
Issue of invitation to tender	15 th July 2025
Tenderers to confirm intention to Bid	22 nd July 2025
Deadline for Clarifications	7 th August 2025
Deadline for Response to Clarifications	18 th August 2025
Closing date for submission of quotations	28 th August 2025
Unsuccessful Bidders not invited to present will be notified	18 th September 2025
Presentations of key areas of submission and customer clarification	24 th September 2025

Notification of Proposed Appointment to Contract	6 th October 2025
Standstill period end	19 th October 2025
Contract award	20 th October 2025
Mobilisation	From 3 rd November 2025
Contract start date	1 st April 2026

3. Evaluation Criteria

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

	Criteria	Weighting
EC1	Compliance with Technical & Regulatory Requirements	15%
EC2	Configuration & control capability	25%
EC3	Reporting & MI capability	20%
EC4	Service and Support	25%
EC5	Cost Effectiveness	15%
	TOTAL	100%

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

		Weighting
EC 1	Compliance with Technical & Regulatory Requirements 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.	15%
EC 2	Configuration & control capability 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.	25%
EC 3	Reporting & MI capability Bidders should be clear on reporting & MI capability, e.g. regularity of overtime, staffing structure changes etc.	20%
EC 4	Service and Support 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 three reference sites where the solution (or key elements of the solution) have been implemented in a similar size project. <i>Please note referees may be contacted directly by the Trust, we would expect referees to be informed in advance and receptive to the contact.</i>	25%

EC 5	Cost effectiveness 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.	15%
-------------	---	-----

4. 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 Mast Academy Trust centrally, with a variety of roles on the evaluation board.

First line evaluation

First line evaluation will use the mandatory criteria and evaluation criteria to identify the top three bidders that represent best overall value and the highest likely quality of output. These top scoring bidders will be invited for a presentation. This presentation will be to demonstrate the services outlined in the tenderers bid and clarification will be sought by the evaluation board on the tender submission.

Should they be invited to provide a presentation, tenderers should ensure they will be available on 24th September 2025.

Unsuccessful tenderers will be notified no later than 18th September 2025.

Second line evaluation

Second line evaluation will be used following the demonstration and clarifications. Subsequently the evaluation criteria will be applied and re-evaluation as determined by the evaluation board, to identify the successful tenderer.

Scoring Definitions

Each criterion will be scored using the following definitions:

SCORE	DEFINITION
5	Exceeds the requirement Exceptional demonstration by the Bidder of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies / services. Response identifies factors that will offer potential added value, with evidence to support the response.
4	Satisfies the requirement Demonstration by the Bidder of the relevant ability, understanding, experience, skills, and resource and quality measures required to provide the supplies / services, with evidence to support the response.
3	Satisfies the requirement with minor reservations Some minor reservations of the Bidder's relevant ability, understanding,

	experience, skills, and resource & quality measures required to provide the supplies / services, with little evidence to support the response.
2	Satisfies the requirement with major reservations Considerable reservations of the Bidder's relevant ability, understanding, experience, skills, and resource & quality measures required to provide the supplies / services, with little evidence to support the response.
1	Does not meet the requirement Little or no evidence to support the response to demonstrate that the Bidder has the ability, understanding, experience, skills, resource & quality measures required to provide the services.
0	The question is not answered or the response is completely unacceptable.

5. Questions and clarifications

If you have any questions or points of clarification about the contents of the ITT document or the services that are to be provided, please use the form available on the trust website [Invitations to Tender | The Mast Multi Academy Trust](#) or by following this [link](#).

The Mast Academy 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 Mast Academy Trust will not disclose the identity of the Bidder who asked the question.

Clarifications deadline: 7th August 2025 at 12pm **Clarification response deadline:** 18th August 2025 at 5pm

6. 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.

7. Submission of Bid/Tender

Please submit one electronic copy of your completed Bid/Tender document by email to procurement@themast.co.uk before 5pm on 28th August 2025.

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

8. 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; email address.

9. List of Appendices

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

Appendix B: Bidder Declaration - Bidder to complete

Appendix C: Overview of main contract terms

NB: Actual clarification document provided separately.

[illegible]

APPENDIX B - BIDDER DECLARATION

I declare that to the best of my knowledge the answers submitted and information contained in the bid correct and accurate.

I understand that the information will be used in the selection process to assess my organisation's suitability to participate further in this procurement.

I understand that the Customer may reject this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.

I am aware of the consequences of serious misrepresentation.

Contact Details and Declaration	
Contact name	
Name of organisation	
Role in organisation	
Phone number	
Email address	
Postal address	
Signature (electronic is acceptable)	
Date	

APPENDIX C - CONTRACT TERMS

TERM
Effective Date The Contract shall commence on 01/04/2026
Expiry Date The Contract shall expire on 31.03.2029 unless extended at the Customer's sole discretion for 1 year.

TERMINATION

Termination may be applied under the following criteria:

- Insolvency and Change of Control
- Termination on Default – Minor Breaches
- Termination on Default – Material Default
- Break: The Customer shall have the right to terminate the Contract at any time by giving 30 days' written notice to the Provider.
- Failure to make payment

PAYMENT TERMS

The Customer shall pay all sums due to the Provider if properly due and applicable in cleared funds within thirty (30) days of receipt of a valid invoice submitted. Where the invoice is in dispute this will be extended to ninety (90) days.

