

United Kingdom-Hardwick: Financial and insurance services
OJ S 235/2016 06/12/2016
Contract notice
Services

Legal Basis:

Directive 2014/24/EU

Section I: Contracting authority

I.1. Name and addresses

Official name: North Tees and Hartlepool NHS Foundation Trust

Postal address: University Hospital of North Tees

Town: Hardwick

NUTS code: UKC11 Hartlepool and Stockton-on-Tees

Postal code: TS19 8PE

Country: United Kingdom

Contact person: Sean Malia

E-mail: cdda-tr.cardeahelpdesk@nhs.net

Telephone: +44 1642383758

Internet address(es):

Main address: <https://www.cardea.nhs.uk/cardea/SupplierPortal.aspx>

Address of the buyer profile: <https://www.cardea.nhs.uk>

I.3. Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at: <https://www.cardea.nhs.uk/cardea/DisplayModules/TradeModules/Negotiations/Opportunities/ViewOpportunityEvent.aspx?EventID=3660&Culture=en-GB>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: <https://www.cardea.nhs.uk/cardea/DisplayModules/TradeModules/Negotiations/Opportunities/ViewOpportunityEvent.aspx?EventID=3660&Culture=en-GB>

Tenders or requests to participate must be submitted to the abovementioned address

I.4. Type of the contracting authority

Other type: health

I.5. Main activity

Health

Section II: Object

II.1. Scope of the procurement

II.1.1. Title

Provision of a Charitable Fund Investment Advisor.

Reference number: PS389.11.16

II.1.2. Main CPV code

66000000 Financial and insurance services

II.1.3. Type of contract

Services

II.1.4. Short description

North Tees and Hartlepool NHS Foundation Trust is seeking the provision of an independent external investment advisor to manage the Trust's Charitable Fund.

The contract will be for an initial 36 month period with an option, at the sole discretion of the Trust, to extend for a further 24 month period subject to satisfactory contract performance and the Trust still having the need and funding for the contract. The extension period will be in 12 month cycles.

Note: The authority is using the e-procurement portal known as Cardea to carry out this procurement process. To obtain further information record your interest on Cardea at <https://www.cardea.nhs.uk/cardea/SupplierPortal.aspx>

II.1.5. Estimated total value

Value excluding VAT: 120 000,00 GBP

II.1.6. Information about lots

This contract is divided into lots: no

II.2. Description

II.2.2. Additional CPV code(s)

66100000 Banking and investment services, 66120000 Investment banking services and related services, 66140000 Portfolio management services

II.2.3. Place of performance

NUTS code: UKC11 Hartlepool and Stockton-on-Tees

Main site or place of performance: Hartlepool and Stockton-on-Tees.

II.2.4. Description of the procurement

North Tees and Hartlepool NHS Foundation Trust is seeking the provision of an independent external investment advisor to manage the Trust's Charitable Fund.

II.2.5. Award criteria

Price is not the only award criterion and all criteria are stated only in the procurement documents

II.2.6. Estimated value

Value excluding VAT: 120 000,00 GBP

II.2.7. Duration of the contract, framework agreement or dynamic purchasing system

Duration in months: 60

This contract is subject to renewal: yes

Description of renewals:

A 3 year contract from 1.2.2017 with an option to extend for 2 years. Extension periods will be in 12 month cycles.

II.2.10. Information about variants

Variants will be accepted: no

II.2.11. Information about options

Options: no

II.2.13.

Information about European Union funds

The procurement is related to a project and/or programme financed by European Union funds:
no

II.2.14. Additional information

Section III: Legal, economic, financial and technical information

III.1. Conditions for participation

III.1.2. Economic and financial standing

Selection criteria as stated in the procurement documents

III.1.3. Technical and professional ability

Selection criteria as stated in the procurement documents

III.2. Conditions related to the contract

III.2.1. Information about a particular profession

Execution of the service is reserved to a particular profession Reference to the relevant law, regulation or administrative provision:

Investment Advisors are required to be FSA registered and authorised to carry on business as a registered investment advisor.

III.2.2. Contract performance conditions

See Tender Specification.

III.2.3. Information about staff responsible for the performance of the contract

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract

Section IV: Procedure

IV.1. Description

IV.1.1. Type of procedure

Open procedure

IV.1.3. Information about a framework agreement or a dynamic purchasing system

IV.1.8. Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: yes

IV.2. Administrative information

IV.2.2. Time limit for receipt of tenders or requests to participate

Date: 04/01/2017 Local time: 12:00

IV.2.3. Estimated date of dispatch of invitations to tender or to participate to selected candidates

IV.2.4. Languages in which tenders or requests to participate may be submitted

English

IV.2.6.

Minimum time frame during which the tenderer must maintain the tender

Duration in months: 4 (from the date stated for receipt of tender)

IV.2.7. Conditions for opening of tenders

Date: 04/01/2017 Local time: 12:00

Section VI: Complementary information

VI.1. Information about recurrence

This is a recurrent procurement: yes

Estimated timing for further notices to be published:

3 years or 5 years, depending on agreed extensions.

VI.2. Information about electronic workflows

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

VI.3. Additional information

The contracting authority considers that this contract may be suitable for economic operators that are small or medium enterprises (SMEs). However, any selection of tenderers will be based solely on the criteria set out for the procurement.

To view this notice, please click here:

<https://www.delta-esourcing.com/delta/viewNotice.html?noticeId=229714500>

GO Reference: GO-2016122-PRO-9183931.

VI.4. Procedures for review

VI.4.1. Review body

Official name: North Tees & Hartlepool NHS Trust

Postal address: University Hospital of North Tees

Town: Hardwick

Postal code: TS19 8PE

Country: United Kingdom

E-mail: cdda-tr.sinfo@nhs.net

Internet address: <http://www.cardea.nhs>

VI.4.2. Body responsible for mediation procedures

Official name: North Tees & Hartlepool NHS Trust

Postal address: University Hospital of North Tees

Town: Hardwick

Postal code: TS19 8PE

Country: United Kingdom

E-mail: cdda-tr.sinfo@nhs.net

Telephone: +44 1642624782

Internet address: <http://www.cardea.nhs>

VI.4.3. Review procedure

Precise information on deadline(s) for review procedures:

North Tees & Hartlepool NHS Foundation Trust will incorporate a minimum 10 calendar day standstill period at the point information on the award of the contract is communicated to tenderers. Applicants who are unsuccessful shall be informed by the contracting Authority as

soon as possible after the decision has been made as to the reasons why the applicant was unsuccessful. If an appeal regarding the award of the contract has not been successfully resolved, The Public Contracts Regulations 2015 provide for aggrieved parties who have been harmed or are at risk of harm by a breach of the rules to take action in the High Court (England, Wales and Northern Ireland). Any such action must general be brought within 3 months. If a declaration of ineffectiveness is sought, any such action must be brought within 30 days where the contracting Authority has communicated the award of the contract and a summary reason to tenders, or otherwise within 6 months of the contract being entered into. Where a contract has not been entered into the court may order the setting aside of the award decision or order the contracting Authority to amend any documents and may award damages. If the contract has been entered into the Court may, depending on the circumstance, award damages, make a declaration of ineffectiveness, order the contracting Authority to pay a fine, and/or order that the duration of the contract to be shortened. The purpose of the standstill period referred to above is to allow the parties to apply to the Courts to set aside the award decision before the contract is entered into.

VI.4.4. Service from which information about the review procedure may be obtained

Official name: North Tees & Hartlepool NHS Trust

Postal address: University Hospital of North Tees

Town: Hardwick

Postal code: TS19 8PE

Country: United Kingdom

E-mail: cdda-tr.cardeahelpdesk@nhs.net

Internet address: <http://www.cardea.nhs>

VI.5. Date of dispatch of this notice

02/12/2016