

**United Kingdom-Stafford: Financial consultancy services**

OJ S 192/2018 05/10/2018

**Contract notice****Services****Legal Basis:**

Directive 2014/24/EU

**Section I: Contracting authority**

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**I.1. Name and addresses**

Official name: Staffordshire County Council

Postal address: Staffordshire Place 1, Tipping Street

Town: Stafford

NUTS code: UKG24 Staffordshire CC

Postal code: ST16 2DH

Country: United Kingdom

Contact person: Laura Kendall

E-mail: [laura.kendall@staffordshire.gov.uk](mailto:laura.kendall@staffordshire.gov.uk)

Telephone: +44 1785854656

**Internet address(es):**Main address: <https://www.staffordshire.gov.uk/Homepage.aspx>Address of the buyer profile: <https://supplierlive.proactisp2p.com/Account/Login#>**I.1. Name and addresses**

Official name: Lichfield District Council

Town: Lichfield

NUTS code: UKG2 Shropshire and Staffordshire

Country: United Kingdom

Contact person: Laura Kendall

E-mail: [laura.kendall@staffordshire.gov.uk](mailto:laura.kendall@staffordshire.gov.uk)

Telephone: +44 1785854656

**Internet address(es):**Main address: <https://www.staffordshire.gov.uk/Homepage.aspx>Address of the buyer profile: <https://supplierlive.proactisp2p.com/Account/Login#>**I.1. Name and addresses**

Official name: East Staffordshire Borough Council

Town: Burton

NUTS code: UKG2 Shropshire and Staffordshire

Country: United Kingdom

Contact person: Laura Kendall

E-mail: [laura.kendall@staffordshire.gov.uk](mailto:laura.kendall@staffordshire.gov.uk)

Telephone: +44 1785854656

**Internet address(es):**Main address: <https://www.staffordshire.gov.uk/Homepage.aspx>Address of the buyer profile: <https://supplierlive.proactisp2p.com/Account/Login#>**I.1. Name and addresses**

Official name: Cannock Chase District Council

Town: Cannock  
NUTS code: UKG2 Shropshire and Staffordshire  
Country: United Kingdom  
Contact person: Laura Kendall  
E-mail: [laura.kendall@staffordshire.gov.uk](mailto:laura.kendall@staffordshire.gov.uk)  
Telephone: +44 1785854656

**Internet address(es):**

Main address: <https://www.staffordshire.gov.uk/Homepage.aspx>  
Address of the buyer profile: <https://supplierlive.proactisp2p.com/Account/Login#>

**I.1. Name and addresses**

Official name: Stafford Borough Council  
Town: Stafford  
NUTS code: UKG2 Shropshire and Staffordshire  
Country: United Kingdom  
Contact person: Laura Kendall  
E-mail: [laura.kendall@staffordshire.gov.uk](mailto:laura.kendall@staffordshire.gov.uk)  
Telephone: +44 1785854656

**Internet address(es):**

Main address: <https://www.staffordshire.gov.uk/Homepage.aspx>  
Address of the buyer profile: <https://supplierlive.proactisp2p.com/Account/Login#>

**I.1. Name and addresses**

Official name: Newcastle under Lyme Borough Council  
Town: Newcastle under Lyme  
NUTS code: UKG2 Shropshire and Staffordshire  
Country: United Kingdom  
Contact person: Laura Kendall  
E-mail: [laura.kendall@staffordshire.gov.uk](mailto:laura.kendall@staffordshire.gov.uk)  
Telephone: +44 1785854656

**Internet address(es):**

Main address: <https://www.staffordshire.gov.uk/Homepage.aspx>  
Address of the buyer profile: <https://supplierlive.proactisp2p.com/Account/Login#>

**I.1. Name and addresses**

Official name: South Staffordshire Council  
Town: Codsall  
NUTS code: UKG2 Shropshire and Staffordshire  
Country: United Kingdom  
Contact person: Laura Kendall  
E-mail: [laura.kendall@staffordshire.gov.uk](mailto:laura.kendall@staffordshire.gov.uk)  
Telephone: +44 1785854656

**Internet address(es):**

Main address: <https://www.staffordshire.gov.uk/Homepage.aspx>  
Address of the buyer profile: <https://supplierlive.proactisp2p.com/Account/Login#>

**I.1. Name and addresses**

Official name: Tamworth Borough Council  
Town: Tamworth  
NUTS code: UKG3 West Midlands  
Country: United Kingdom

Contact person: Laura Kendall

E-mail: [laura.kendall@staffordshire.gov.uk](mailto:laura.kendall@staffordshire.gov.uk)

Telephone: +44 1785854656

**Internet address(es):**

Main address: <https://www.staffordshire.gov.uk/Homepage.aspx>

Address of the buyer profile: <https://supplierlive.proactisp2p.com/Account/Login#>

### **I.1. Name and addresses**

Official name: Stoke on Trent City Council

Town: Stoke on Trent

NUTS code: UKG23 Stoke-on-Trent

Country: United Kingdom

Contact person: Laura Kendall

E-mail: [laura.kendall@staffordshire.gov.uk](mailto:laura.kendall@staffordshire.gov.uk)

Telephone: +44 1785854656

**Internet address(es):**

Main address: <https://www.staffordshire.gov.uk/Homepage.aspx>

Address of the buyer profile: <https://supplierlive.proactisp2p.com/Account/Login#>

### **I.2. Information about joint procurement**

The contract involves joint procurement

In the case of joint procurement involving different countries, state applicable national procurement law:

English

### **I.3. Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at: <https://supplierlive.proactisp2p.com/Account/Login#>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: <https://supplierlive.proactisp2p.com/Account/Login#>

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

### **I.4. Type of the contracting authority**

Regional or local authority

### **I.5. Main activity**

General public services

## **Section II: Object**

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### **II.1. Scope of the procurement**

#### **II.1.1. Title**

Framework Agreement for the Provision of a Council Tax Discount and Reduction Review Service

Reference number: IA1110

#### **II.1.2. Main CPV code**

66171000 Financial consultancy services

#### **II.1.3. Type of contract**

Services

#### **II.1.4. Short description**

Each Council will conduct reviews of all Council Tax reductions which are relevant to the occupancy of a property and those residents. This will typically include:

- all single person discounts,
- all other Council Tax discounts,
- all empty properties, including long term voids, which do not attract a reduction,
- all Local Council Tax Reduction (LCTR) cases, in so far as the residents occupying the household will be reviewed. Income, capital, etc. will not be reviewed as a part of this project.

#### **II.1.5. Estimated total value**

Value excluding VAT: 1 000 000,00 GBP

#### **II.1.6. Information about lots**

This contract is divided into lots: yes  
Tenders may be submitted for all lots

### **II.2. Description**

#### **II.2.1. Title**

Data Matching Service  
Lot No: 1

#### **II.2.2. Additional CPV code(s)**

79212100 Financial auditing services

#### **II.2.3. Place of performance**

NUTS code: UKG24 Staffordshire CC  
Main site or place of performance: Staffordshire

#### **II.2.4. Description of the procurement**

If a Council requires services from this lot 1, it shall provide details of the cases to be reviewed, in an agreed format (e.g. NFI format). The Contractor will match the data to its own records and databases and report to the Council the likelihood of undeclared occupants living at the address and the names of other occupants that it believes may be resident, and any other evidence to support the contention that other residents exist.

#### **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: 600 000,00 GBP

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

Duration in months: 48  
This contract is subject to renewal: no

#### **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**

#### **II.2. Description**

##### **II.2.1. Title**

Full Managed Service  
Lot No: 2

##### **II.2.2. Additional CPV code(s)**

79212100 Financial auditing services

##### **II.2.3. Place of performance**

NUTS code: UKG24 Staffordshire CC

##### **II.2.4. Description of the procurement**

Should a Council require the Contractor to investigate any mismatches, update their systems with the results of the investigations and deal with any subsequent Council Tax payer contact, it shall request services from this lot 2. In this case, access will be provided to relevant systems, files and information held by the Council and the Contractor will be expected to update the Council's records throughout the project.

##### **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: 400 000,00 GBP

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

Duration in months: 48  
This contract is subject to renewal: no

##### **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**

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### **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

## **Section IV: Procedure**

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### **IV.1. Description**

#### **IV.1.1. Type of procedure**

Open procedure

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

The procurement involves the establishment of a framework agreement

Framework agreement with several operators  
Envisaged maximum number of participants to the framework agreement: 2

#### **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: 05/11/2018 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: 3 (from the date stated for receipt of tender)

#### **IV.2.7. Conditions for opening of tenders**

Date: 05/11/2018 Local time: 13:00

Place:

Staffordshire County Council Offices

## **Section VI: Complementary information**

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### **VI.1. Information about recurrence**

This is a recurrent procurement: yes

Estimated timing for further notices to be published:

42 months

### **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**

### **VI.4. Procedures for review**

#### **VI.4.1. Review body**

Official name: Staffordshire County Council

Postal address: Tipping Street  
Town: Stafford  
Postal code: ST16 2DH  
Country: United Kingdom

**VI.4.2. Body responsible for mediation procedures**

Official name: Staffordshire County Council  
Postal address: Tipping Street  
Town: Stafford  
Postal code: ST16 2DH  
Country: United Kingdom

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

Official name: Staffordshire County Council  
Postal address: Tipping Street  
Town: Stafford  
Postal code: ST16 2DH  
Country: United Kingdom

**VI.5. Date of dispatch of this notice**

01/10/2018