

External Audit Services 3-Year Appointment to
audit year ending 31 August 25, 26 and 27

Ref: 106-07-24

Invitation to Tender and Scope of Services

Central Regions School Trust (the Trust) is seeking to engage in a competitive tender process for the appointment of its External Auditors for an initial period of three years with the potential for an extension of up to two further years.

1. Background

Central Region Schools Trust was established in September 2012 when Arrow Vale Community High School became a Sponsored Academy. Originally named Redditch RSA Academies Trust, it is now known as Central Region Schools Trust.

The Governors at Arrow Vale chose to become an RSA Academy, recognising the benefits of close affiliation with the Royal Society for the Encouragement of Arts, Manufactures and Commerce (RSA). This decision led to the school joining the RSA Family of Academies under an umbrella trust, along with The RSA Academy, Tipton, and Whitley Academy. Our Trust was established as a Multi-Academy Trust (MAT), allowing Ipsley CE Middle School to formally join with Arrow Vale as Ipsley CE RSA Academy in January 2013.

Arrow Vale's success led to its recognition by the DfE as a National Support School, and Guy Shears was appointed as a National Leader of Education in 2015. The school became a National Teaching School in September 2015 as part of the RSA Academies Teaching School Alliance.

The MAT expanded in March 2016 when Church Hill Middle School and Abbeywood First School joined, providing a seamless curriculum from ages 9 to 19 in the Redditch Pyramid. The Trust was renamed Central RSA Academies Trust (CRSAAT) in 2017, reflecting its vision.

The RSA Academy, Tipton, joined the Trust in September 2017, establishing a North and South hub. The Trust became the lead organisation for the RSA Academies Teaching School Alliance.

In January 2019, Sutton Park Primary joined the MAT, strengthening primary provision. Additional schools, including Oldbury Park Primary RSA Academy, St. Stephen's CE RSA Academy, Arrow Valley First School, and Waseley Hills High School, joined us in following years.

The Trust actively seeks schools that share our vision within the West Midlands Conurbation. In September 2021, CRSAAT was rebranded as Central Region Schools Trust, and RSA Academy was renamed Gospel Oak. Subsequently, in January 2022, Holyhead School, a mixed secondary school and sixth form, became a part of our Trust. We then welcomed Lickhill Primary School into our fold in January 2023, followed by Oak Hill First School in January 2024.

Trust is comprised of 13 Schools:

1. Arrow Vale High School
2. Ipsley CE Middle School
3. Church Hill Middle School
4. Abbeywood First School
5. Gospel Oak School
6. Sutton Park Primary School
7. Oldbury Park Primary School
8. St Stephens CE First School
9. Arrow Valley First School
10. Waseley Hills High School
11. HolyHead School
12. Lickhill Primary School
13. Oak Hill First School

Further details about the Trust can be found on our website: [Central Region Schools Trust - Our Trust \(crst.org.uk\)](https://www.crst.org.uk)

2. Requirements

We are seeking to procure a service that provides:

- External Audit Services

The Trust requirements are as follows:

- Preparation of the Central Region Schools Trust Annual Report and Accounts.
- Expressing an opinion of the above Financial Statements.
- Accountants Assurance Report on Regularity as required by the ESFA.
- Accountants Assurance Report on the Annual Accounts Return as required by the ESFA.
- Attendance at the Trust Board of Directors meeting at which the Statutory Accounts are scrutinised.
- Audit of the Teachers' Pension Scheme End of Year Certificate.
- Preparation and submission of the Corporation tax return.
- Preparation and submission of the Academies Accounts return.
- A working knowledge of financial management systems. The Trust is undergoing an exercise to change the finance system. As yet the new system is unknown.
- Other ad hoc services as required.
- Taxation advice as required.
- VAT advice as required.

3. Procurement timeline

Event	Date
Invitation to Tender Issued	5 th July 2024
Tenderers to express interest and submit clarifications questions via email	17 th July 2024
CRST to issue responses to clarification questions, options for scope clarification phone calls	24 th July 2024
Deadline for Receipt of Tender	5pm Friday 2nd August 2024
Notification of short-list	5pm Tuesday 9 th August 2024
Supplier Engagement Day	w/c 12 th August 2024
Tender Award update	w/c 12 th August 2024

Tenderers should raise any queries they have about the requirements via email to procurement@crst.org.uk Any questions will be included on an FAQ document and posted on the Trust website alongside the Tender Notice, to ensure all interested parties have access to the same information.

CRST will endeavour to answer all written enquiries prior to tenders being submitted and reserves the right not to respond to a request for information or clarification. All tenders are required to be submitted by the date quoted in the table: 2nd August 2024.

It is the responsibility of the tenderer to ensure that the tender is submitted and delivered on time. The Trust will not consider late or incomplete submissions. The submission should be via email to Tenders@crst.org.uk The Trust will shortlist tenders and then invite providers to a Supplier Engagement Day. The Trust reserves the right to vary the timetable and is also under no obligation to appoint a preferred bidder from this exercise.

4. Submission of Tender

All tenders should specifically identify:

- A total annual cost proposal.
- A clear indication of services provided as part of the fee.
- The variable costs for the proposal, including charge per new academy/ad-hoc advice, if applicable.
- Any inflationary or other provisions for periodic increase in fees.
- Fees chargeable for additional services that are not included in as part of the annual cost proposal.
- Your firms' approach to client management and how you offer ongoing support.
- Evidence of working with Multi Academy Trusts and/or charitable trusts.
- Example Management Letter.
- Statistics on Client Retention and Recruitment rates.
- Biographies of staff the Trust will be working with, listing expertise and experience.
- The reports available to the Trust.
- Two References from organisations that you have worked with within the educational sector.
- Compliance measures for meeting the requirements of the Data Protection Act 2018
- A brief description of your business continuity plans that mitigate against an interrupted service should this arise.
- Confirmation that you will conduct code of conduct of the professional body.
- Details of any additional measurable benefits you can provide in terms of quality and cost which impact on social value indicators.
- Explanation of training / events provided to clients.
- What "added value" you can offer CRST.

5. Contracting and Invoicing

The contract will be for a three-year period, commencing for financial year 1st September 2024 and ending on 31 August 2027, unless terminated earlier in accordance with the terms of the contract.

The Trust is under no obligation to appoint a provider from this exercise and reserves the right not to appoint or to re-run the exercise. The Trust will not be liable for any costs prior to appointment, including submission of Tender.

Invoicing arrangement will be made clear with the appointed provider as part of their confirmation of appointment.

6. Instructions to Tenderers

Please submit your tender offer in accordance with all the instructions, requirements, and specification.

Please ensure your proposal is no longer than ten pages or up to fifteen slides.

All tenders must be complete and submitted to Tenders@crst.org.uk by the specified deadline.

8. Compliance

CRST reserves the right to disqualify or reduce the evaluation score of any tenderers who do not fully comply with the requirements in the tender documentation, in particular the closing date and time.

The Trust reserves the right to evaluate proposals on a variety of criteria. The tender with the lowest price will not automatically be accepted as the successful bid.

9. Termination

Either party may terminate the contract by giving 6 months' notice. The initial period of the contract is three years; this could be renewed for an additional one- or two-year period.