Tender Instructions

Pendle Borough Council

Referred to as the Contracting Body throughout

2020 Insurance Tender

This procurement is being conducted as a Further Competition under OJEU Open Procedure

Quotation Deadline Date: 24 January 2020

Renewal Date: 1 April 2020

Issue Date: 10 December 2019

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# Instructions to tenderers

Pendle Borough Council would like to draw your attention to the following important issues:-

1. Tender responses are required on the basis of a contract period of three years from 1 April 2020 to 31 March 2023 with the option to extend for a further two years to 31 March 2025. Tenderers are invited to submit bids for any or all lots. Where a lot consists of more than one insurance, Pendle Borough Council reserves the right to award individual insurances to a tenderer separately from the rest of that lot in order to achieve the most economically advantageous outcome. All bidders must clearly identify which lot (or part of lot) they are responding to.

Pendle Borough Council also reserves the right to cancel, abandon or not award all or any part of this tender as a result of this exercise. The Council will not be liable for any cost or liability that may arise as a result of this action. The Council will not accept liability for any costs incurred in the preparation and submission of any tender.

1. Tenders are requested in accordance with the programme as set out in the body of this document including alternative options where requested.
2. Tenderers must note that all discounts which may be available e.g. Long Term Agreement, must be separately identified and transparent.
3. Tenderers should stipulate within the tender response where individual Lots are not available in isolation.
4. Premiums must be provided within the evaluation spreadsheet for each individual lot for which you are providing quotations. The amount quoted should represent the premium before any package discounts have been applied.
5. If discounts are available for winning multiple lots, these must be clearly stated within the tender response. If, following the outcome of the tender, packaged lots are of interest to the Council, a clarification will be raised on The Chest to confirm the premiums stated.
6. Tenderers should complete the evaluation spreadsheet for each Lot for which a bid is submitted.
7. Pendle Borough Council may be interested in profit share or low claims rebate agreements. Underwriters must outline the form of agreements they are able to offer clearly and transparently.
8. Technical advisers to Pendle Borough Council in this matter are Aon Risk Solutions who will be supporting the Council in the tender evaluation process.
9. The ITT has been issued via The Chest: [https://procontract.due-north.com](https://procontract.due-north.com/register)

Any requests for copies of this tender in any other form will be disregarded.

1. Questions and Clarifications
* Tenderers may raise questions or seek clarification regarding any aspect of this procurement at any time prior to the deadline of **17 January 2020 (5pm).**
* All questions relating to this tender must be submitted via The Chest’s Question and Answer facility.
	+ Please identify which Lot your question relates to.
	+ Please refer to previously asked questions before asking a question as duplicate questions will not be answered.
* Both questions and answers will either be made public on The Chest or responded to directly to the originator depending on the content.
1. Tender Submission Deadline and Process

The final date for receipt of tenders is: **24 January 2020 (12 noon).**

All tender responses must be uploaded to The Chest. Tenderers must ensure that they allow sufficient time to upload their documentation to The Chest prior to the closing time and date andthat all documents forming part of their tender submission are uploaded prior to the specified deadline.

It is the Tenderer’s responsibility to ensure that they comply with these instructions and ensure that the tender response is received by the deadline specified above. Bids received before the stated deadline will not be opened prior to the deadline.

**Any tender responses not submitted or not submitted complete by the stated deadline will be discarded. It is your responsibility to meet the tender deadline.**

1. All quotations are to be valid up to **1 April 2020.**

**Timetable**

**Activity Deadline**

Tender documents to be released 10 December 2019

Last date for submission of questions 17 January 2020 (5pm)

Date for return of tenders 24 January 2020 (12 noon)

Evaluation and assessment period commences 24 January 2020

Contract award decision 11 March 2020

Commencement of placement 00.01 hours on 1 April 2020

# Evaluation Criteria

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Lot No | Description | Price | Cover | Service & Support | Claims Service | Risk Management | Innovation & Enhancements | Social Value |
| 1 | Property inc Contract Works | 50% | 30% | 5% | 5% | 5% | 5% | Not scored |
| 2 | Combined Liability | 50% | 30% | 5% | 10% | 2.5% | 2.5% | Not scored |
| 3 | Motor Fleet | 50% | 30% | 5% | 10% | 2.5% | 2.5% | Not scored |
| 4 | PA / Travel | 50% | 35% | 5% | 5% | 0% | 5% | Not scored |
| 5 | Fidelity Guarantee | 50% | 35% | 5% | 5% | 0% | 5% | Not scored |
| 6 | Statutory Inspection / Insurance | 45% | 5% | 50% | 0% | 0% | 0% | Not scored |
| 7 | Cyber Liability | 50% | 35% | 5% | 5% | 2.5% | 2.5% | Not scored |
| 8 | Terrorism | 50% | 35% | 5% | 5% | 2.5% | 2.5% | Not scored |

**Please refer to the evaluation spreadsheet document attached in Appendix F for full details of the Evaluation Criteria.**

**Tender Responses**

There are a number of documents that you must include within your tender response:

* Completed Certificate of Bona Fide tendering (Appendix A)
* Completed Freedom of Information Statement (Appendix B)
* Completed Conflict of Interest Form (Appendix C)
* Completed Form of Tender (Appendix D)
* Submission Checklist of Documents (Appendix E)
* Evaluation spreadsheet (Appendix F)
* Quotations containing the reference of the relevant policy wording
* Supporting information as required

Please note that failure to complete and include these documents will result in your bid not being evaluated and you will be removed from the process.

It is your responsibility to ensure that you comply with these instructions and that the tender response is received by the deadline specified above. Any tender responses not submitted or not submitted complete by the stated deadline will be discarded. It is your responsibility to meet the tender deadline.

Please note that tender responses will not be opened until after the deadline.

All costs in submitting the tender response will be borne by the tenderer.

A tender response must remain valid and capable of acceptance by the Contracting Body until 1 April 2019. A tender response with a shorter validity period may be rejected.

**Modification and withdrawal of tender responses**

You may modify your tender response prior to the deadline.

No tender response may be modified subsequent to the deadline for submissions.

You may withdraw your tender response at any time prior to the acceptance of an offer of contract by sending a withdrawal notice in writing to Pendle Borough Council.

**Evaluation**

Aon will complete an initial analysis of the bids in terms of pricing and quality.

If tender responses contain any points requiring clarification, bidders will be contacted directly via The Chest. All correspondence will take place via the portal to ensure a complete audit trail.

Pendle Borough Council will complete the scoring exercise in line with the evaluation criteria and are responsible for awarding the contract.

**Scoring**

Where multiple options are requested for a specific Lot, all options will be evaluated in their own right.

**Standstill Period**

In accordance with Regulations 87 of the Public Contracts Regulations 2015 (as amended), Pendle Borough Council will incorporate a minimum 10 calendar day standstill period starting from the date when the contract award was notified to bidders. Unsuccessful bidders will be provided with information at the start of the standstill period including details of their bid in relation to the winning bid comprising the reasons for the decision, the characteristics and relative advantages of the successful tender, the score of the economic operators and the name of the economic operator to be awarded the contract. Tenderers have a right of appeal provided for within the Public Contracts Regulations 2015 (as amended). Any such proceedings must be brought in the High Court of England & Wales.

If a request for additional information is received following issue of the intention to award letters the Contracting Body will respond within fifteen days of the request and the standstill period will not be extended.

**Freedom of Information**

Tenderers are advised that each Contracting Body is subject to the obligations of the Freedom of Information Act 2000 (“FOIA”), the Environmental Information Regulations 2004 (“EIR”) and the Government’s transparency agenda. The Contracting Body may, pursuant to a request under the FOIA, EIR or otherwise, disclose or publish the entire Contract including the supplier’s tender. Tenderers should submit a Confidential Information Declaration if they consider that any part of their Tender should be exempt from disclosure. The Contracting Body will take the Confidential Information Declaration into consideration when determining whether to publish or disclose information but the final decision on publication or disclosure shall remain with the Contracting Body.

**APPENDIX A - CERTIFICATE OF BONA FIDE TENDERING**

I declare that this is a bona fide tender, intended to be competitive and that I have not fixed or adjusted the amount of the tender by or under or in accordance with any agreement or arrangement with any other person (“person” includes any persons any body or association, corporate or incorporate) except as disclosed on this Certificate..

I declare that the company is not aware of any connection with a member of the Council’s staff which could affect the outcome of the bidding process.

I declare that I have not done and I undertake that I will not do at any time the following:

1. Communicate to any person, including the addressee calling for the tender, the amount or approximate amount of the proposed tender.

(b) Enter into any agreement or arrangement with any other person or body that he or it shall refrain from tendering or as to the amount of the tender to be submitted.

(c) Enter into any agreement or arrangement with any other person or body that we will refrain from tendering on a future occasion.

(d) Offer or pay or agree to pay any sum of money or valuable consideration directly or indirectly to any person for doing or cause to be done in relation to any other tender for the said work any act of the kind described above.

 (e) Canvas or solicit the Council staff.

I understand that any instances of illegal cartels or market sharing arrangements suspected by the council will be referred to the Office of Fair Trading for investigation and may be subject to action under the Restrictive Trade Practices Act 1976.

I understand that any misrepresentations may also be the subject of a criminal investigation or used as a basis for civil action.

In this certificate “agreement” or “arrangement” includes any transaction private or open, or collusion, formal or informal, and whether or not legally binding

Disclosure: ……………………………………………………………………............................

Signed: .................................……………….……………………………………………….

Print name: ..............……………………...…………..............................................................

Title: …………...................................................................................................

On behalf of: (Print). ...........................................................................................

**APPENDIX B – FREEDOM OF INFORMATION STATEMENT**

I/We consider that:-

1. The information in this Tender is sensitive[ ] ; or

2. The information in this Tender is not sensitive.

3. Please state below if you consider the information to be sensitive or not sensitive. If you consider it to be sensitive please state which information should not be disclosed and provide reasons.

|  |
| --- |
|       |

4. Period for which information should remain commercially sensitive. Please state.

|  |
| --- |
|  |

|  |  |
| --- | --- |
| Signed: |       |

|  |  |
| --- | --- |
| Block Capitals |       |

|  |  |
| --- | --- |
| for and on behalf of: |       |

|  |  |
| --- | --- |
| Date: |       |

**APPENDIX C – CONFLICT OF INTEREST FORM**

1. Please state below the name and relationship of the person who has any association (either directly or indirectly) with any member or employee of Pendle Borough Council involved in this contract?
2. Please identify below any potential conflicts of interest that may arise if the tenderer were selected.

|  |  |
| --- | --- |
| Signed: |       |

|  |  |
| --- | --- |
| Block Capitals |       |

|  |  |
| --- | --- |
| for and on behalf of: |       |

|  |  |
| --- | --- |
| Date: |       |

**APPENDIX D – FORM OF TENDER**

* + 1. Tender for
		2. To: PENDLE BOROUGH Council
		3. I/We the undersigned, having examined and understood your Instructions for Tendering; Supplier Questionnaire; Response Document; and Appendices (the “Tender Document”) hereby tender for the supply of (insert contract title) in the Borough of Pendle Borough.
		4. In the event of acceptance of this tender, I/We agree to execute within 15 days of request a formal written Contract, to be prepared by the Council and comprising the Tender Document, including my/our tender responses. Until and unless such an agreement is executed, your written acceptance together with the above documents will constitute the contract between us.
		5. I/We understand that you may accept more than one (1) tender; you may accept a tender(s) in whole, in part or may not accept any tender whatsoever. No Bidder will be reimbursed for any costs incurred in submitting a tender
		6. I/We agree that my/our tender shall be submitted on the preconditions stipulated in the Instructions for Tendering.
		7. I/We agree that this tender, without modification, shall remain open for acceptance by the Council for a period of three (3) months from the date stated for delivery or receipt of tenders.
		8. I/We confirm that the information supplied to the Council and forming part of this Tender including (for the avoidance of doubt) any information supplied to the Council as part of my/our initial expression of interest in tendering, was true when made and remains true and accurate in all respects. I/We confirm and undertake that if any of such information becomes untrue or misleading that I/we shall notify you immediately and update such information as required.

**APPENDIX E – SUBMISSION CHECKLIST**

**Documents for completion in order to submit your bid compliantly**

Tenderers must complete all documents outlined in this section. All documents should be completed and uploaded via The Chest portal by no later than the specified closing date and time. In submitting your ITT you must provide (NOT EXHAUSTIVE):-

|  |  |
| --- | --- |
| **Item required within submission** | Included (Y / N) |
| Completed Certificate of Bona Fide tendering (Appendix A) |  |
| Completed Freedom of Information Statement (Appendix B) |  |
| Completed Conflict of Interest Form (Appendix C) |  |
| Completed Form of Tender (Appendix D) |  |
| Submission Checklist of Documents (Appendix E) |  |
| Evaluation spreadsheet (Appendix F) |  |
| Quotations containing the reference of the relevant policy wording |  |
| Supporting information as required  |  |

Please attach this sheet with your tender, and include any other information you deem necessary to support your tender.

**Please note that failure to complete the required documents for each for which you are providing a quotation will result in your bid not being evaluated and you will be removed from the process.**