

itt_2988 - 13/0045 Insurance Services

Last Name & First Name	Date and Time
Suzanne Wright	20/11/2017 09:32:08 - Time Zone: GMT + 0:00

Owner	wner Contracting Authority	
Suzanne Wright	Moray Council	Moray Council

Project information

Project Code	Project Title	Project Reference
project_1587	13/0045 Insurance Services	

Overview

ITT Code	ITT Title
itt_2988	13/0045 Insurance Services
ITT Description	
The Moray Council is seeking one supplier to provide a range of April 2014 and will be for a period of three years with an option	insurance services to the Council. The contract will run from 1 to extend for a further two years on a year-by-year basis.
Status	
Awarded	
Type of Supplier Access	
ITT Open to All Suppliers	
Estimated Value of Contract	Hide Value from Suppliers:
1,000,000 GBP	No
Event Currency	
GBP	
Test ITT	
No	

Date & Time Settings

Options for Viewing Responses	Visibility of Evaluation Group Comments During Evaluation
Sealed (sequential opening)	Blind Behaviour
End Date for Supplier Clarification Messages	End Time for Supplier Clarification Messages
03/01/2014	17:00
Closing Date	Closing Time (hh:mm)
09/01/2014	12:00
Number of Hours before Closing Time to block Expressions of	
Interest	
0	

Date & Time Information

ITT Publication-Date	ITT Publication-Time (hh:mm)
07/11/2013	08:59:33
ITT Latest Change-Date	ITT Latest Change-Time (hh:mm)
06/09/2017	05:00:06

Envelopes

Qualification Envelope	Yes
Technical Envelope	Yes
Commercial Envelope	Yes

Awarding Strategy

Supplier Response Ranking	Most Economically Advantageous Tender
Scoring Method	Percentage Weight
Technical Score Weight	30%
Commercial Score Weight	70%
Weights Visible to Suppliers on 'Printable View'	No

Use this area for sharing attachments with Suppliers. Files in this area will be made visible to Suppliers on publication of the ITT. Supplier downloading of individual files may be monitored, allowing you to verify the date & time at which each Supplier has viewed each file.

Path			Descr	iption	E	older Siz	е			
Top Level (2)			_ 0001			8 KB				
Filename	Downl		Last N Date	Modification	_	Description				File Size
Terms Conditions – revised 02–12–13.docx	Yes 02,		02/12	2/12/2013		Revised Terms & Conditions			document	45 KB
Terms Conditions.docx	No		02/12	2/2013		he Moray ervice Co		Terms and	d Conditions for	44 KB
Path				Description	1		Folder Si	ze		
Top Level/Bidder Agreement (2)				ITT Bidder	Agı	reement	66 KB			
Filename		Downlo	adabl	e Last Modifi Date	cat	ion	Descript	ion		File Size
Bidder Agreement - 21 August 2013	.doc	No		02/12/201	.3					33 KB
Bidder Agreement - revised 02-12-1	3.doc	Yes		02/12/201	.3		Revised	Bidder Agr	eement documen	t 33 KB
Path						Descrip	otion		Folder Size	
Top Level/Evaluation and Awarding (Criteria	(1)							34 KB	
Filename				Downloadable	5	Last Mo	odificatio	n Date	Description	File Size
Evaluation and Awarding Criteria - F	NAL.xl	S	Y	′es		04/11/	2013			34 KB
Path					De	escription	1	Folder Siz	:e	
Top Level/Specification Documents (17)							2,153 KB		
Filename				ownloadable		st Modifi ate	cation	Description	on	File Size
Appendix 1 - Main Specification & Ba Information.doc	ackgrou	ınd	Y	´es	04	1/11/201	.3			100 KB
Appendix 10 - Claims Experience.pd	f		Y	'es	04	1/11/201	.3			191 KB
Appendix 11 - Fire Claims (Housing)	.xls		Y	'es	04	1/11/201	.3			31 KB
Appendix 12 - Fire Claims (General I	ropert	ies).xls	Y	'es	04	1/11/201	.3			26 KB
Appendix 13 - Works in Progress Cla	ims.xl	S	Y	'es	04	1/11/201	.3			26 KB
Appendix 14 - Leased Properties Cla	ims.xls	5	Y	'es	04	1/11/201	.3			27 KB
Appendix 15 - Employers Liability Cl		ls	Y	'es	04	1/11/201	.3			30 KB
Appendix 16 - Public Liability Claims			Y	'es		1/11/201				155 KB
Appendix 1a - Revised Wages and Sa		doc	Y	'es	05	5/12/201	.3	Revised W data	/ages and Salaries	29 KB
Appendix 2 - Insurance Programme_				es	06	5/11/201	.3			1,026 KB
Appendix 3 - General Properties Sep			lsx Y	es		1/11/201				31 KB
Appendix 4 - Education Reinstateme 2014-15.xlsx	nt Valu	ations	Y	es	04	1/11/201	.3			20 KB
Appendix 5 - Woodland Properties.d	ос		Y	'es	04	1/11/201	.3			33 KB
Appendix 6 – All Risks Schedule.doc			Y	'es	04	1/11/201	.3			40 KB
Appendix 7 - Leased Properties.xls			Y	'es	04	1/11/201	.3			48 KB
Appendix 8 – Council Vehicles (Registered Vehicles).xlsx			Y	es	04	1/11/201	.3			37 KB
Appendix 9 - Item Specification.pdf			Y	'es	04	1/11/201	.3			308 KB
Path				Descriptio				F	older Size	
Top Level/System Guidance (1)				System Gu		ance Doc	ument		L63 KB	
Filename	Dov	/nloadab	ole	Last Modif						le Size
System Guidance v1.0.docx	Yes			22/10/20	13				1	63 KB

Attachments Visible Only to Buyers

Path	Description	Folder Si	ze	
Top Level (0)				
The Directory is empty				
Path		Description	Folder Size	
Top Level/Buyer Guide (1)		-	1,320 KB	
Filename	Downloadable	Last Modification Date	Description	File Size
eVm Buver Guide – 14 August 2013.doc	Yes	22/10/2013		1.320 KB

Suppliers

Suppliers	City	Contact Name	Phone	Invited by	Date Invited	Date Details Accessed
alford burton	birmingham	alford dan	0121 449 4901	Self Invited	08/11/2013 12:12	08/11/2013 12:11 Declined to Respond
Aon Uk Limited	London	McFarlane Marcia	0207 086 3890	Self Invited	03/12/2013 13:18	03/12/2013 13:17 Declined to Respond
Aon UK Limited	Glasgow	Fleming Peter	0141 222 3233	Self Invited	11/11/2013 13:31	11/11/2013 13:30 Not Replied
Bruce Stevenson Risk Management Ltd	Glasgow	Cairns Lynne	0141 354 2883	Self Invited	07/11/2013 10:28	07/11/2013 10:28 Not Replied

Financial Management (UK) Limited	Beckenham	Patel Himesh	02086582888	Self Invited	12/12/2013 16:29	12/12/2013 16:28 Not Replied
Motor Accident Protection Services Ltd	Southport	Tattersall James	08444 171 422	Self Invited	08/11/2013 18:13	08/11/2013 18:13 Not Replied
TopMark Claims management Ltd	Glasgow		0141 331 6844	Self Invited	12/11/2013 13:03	12/11/2013 13:03 Not Replied
Travelers Ins Co Ltd	Redhill	Glyn Jane	01737 787093	Self Invited	12/11/2013 15:05	12/11/2013 15:04 Declined to Respond
Zurich Municipal	Glasgow	Forsyth Kirsty	0141 204	Self	07/11/2013	07/11/2013 09:56 Replied

Awarding Information

ITT Opening Date	ITT opened by
09/01/2014 12:07:59	Suzanne Wright
Qualification Envelope Opened	Qualification Envelope Opened by
09/01/2014 12:08:40	Suzanne Wright
Technical Envelope Opened	Technical Envelope Opened by
10/01/2014 16:47:52	Suzanne Wright
Commercial Envelope Opened	Commercial Envelope Opened by
18/03/2014 14:19:59	Suzanne Wright
Awarding Date	ITT awarded by
06/09/2016 16:54:11	Katrina Martin

Received Offers

Suppliers	Offered Price	Confirmed Price		Price score	Total	Exclusion Details	Rejected	
Aon Uk Limited								
Travelers Ins Co Ltd								
Zurich Municipal	2,727,970,194.21	2,727,970,194.21	87.5	100	96.25			Successful Supplier
alford burton								

Awarding Comments

No Awarding Comments

Qualification Questionnaire

General Attachments
Not Allowed

Qualification Envelope
1.1 Acceptance of Documentation (Questions: 7)
1.2 Bidders Details (Questions: 22)
1.3 Consortia & Subcontracting (Questions: 2)
1.4 Criminal Convictions and Business Probity – Mandatory Exclusions (Questions: 7)
1.5 Criminal Convictions and Business Probity - Discretionary Exclusions (Questions: 9)
1.6 For Completion by Non-UK Businesses ONLY (Questions: 3)
1.7 Economic and Financial Standing (Questions: 3)
1.8 Economic and Financial Standing - Consortia (Questions: 1)
1.9 Insurance Requirements (Questions: 2)
1.10 Insurance (Questions: 2)
1.11 Conflict of Interest (Questions: 2)
1.12 Technical or Professional Ability (Questions: 4)
1.13 Equal Opportunities (Questions: 4)
1.14 Quality Management (Questions: 4)
1.15 Contract Termination (Questions: 3)

Qualification Questionnaire: 1.1 Acceptance of Documentation

	Question	Description	
1.1.1	BIDDERS GUIDANCE	Bidders must navigate to the "Attachment" area to download and view documents this procurement exercise.	relating to
	Question	Description	Question Type
1.1.2	System Guidance		Yes/No Value
1.1.3	ITT Bidder Agreement	* Please confirm that you have read, understood and accept the "PQQ/ITT Bidder Agreement" document.	Yes/No Value
1.1.4	Terms and Conditions	* Please confirm you have read, understood and accept the Terms and Conditions pertaining to this tender.	Yes/No Value

		* Please confirm you have read and understood the Evaluation and Award criteria document.	Yes/No Value
1.1.6	Specification Documents	* Please confirm you have read and understood the Specification documents.	Yes/No Value
1.1.7	Confirmation – Name	* Please enter your name and your position within the organisation.	Text
1.1.8	Confirmation - Date	* Please enter the date in which you have confirmed the above.	Date

Qualification Questionnaire: 1.2 Bidders Details

	Question	Description	
1.2.1	IMPORTANT:	You are able to update the information in the Supplier Profile or Extended Profile at any information contained within your Profile or Extended Profile is visible to buyers within cauthorities using PCS-Tender and administrators of the system. It is not visible to other registered on the system. Your Extended Profile is also updated automatically whenever your PQQ or ITT response (which contains answers to standardised questions).	ontracting suppliers a buyer opens
1.2.2	BIDDERS GUIDANCE	All personal information supplied will be treated as confidential and will be subject to th Act 1998.	e Data Protection
	Question	Description	Question Type
1.2.3	[BD Organisation Name]	Name of Organisation (Organisation either tendering or acting as lead contact where a consortium bid is being submitted)	Text
1.2.4	[BD Address 1]	Address line 1	Text
1.2.5	[BD Address 2]	Address line 2	Text
1.2.6	[BD Town/City]	Town/City	Text
1.2.7	[BD Region]	Region	Option List
1.2.8	[BD Postcode]	Postcode	Text
1.2.9	[BD Contact]	Contact name for enquires	Text
1.2.10	[BD Telephone]	Telephone Number (including dialling code)	Text
1.2.11	[BD Email]	Email address	Text
1.2.12	[BD Website]	Website address (if applicable)	Text
1.2.13	[BD Reg Address 1]	Registered Office Address line 1	Text
1.2.14	[BD Reg Address 2]	Registered Office Address line 2	Text
1.2.15	[BD Reg Town]	Registered Office Town/City	Text
1.2.16	[BD Reg Region]	Registered Office Region	Option List
1.2.17	[BD Reg Postcode]	Registered Office Postcode	Text
1.2.18	[BD Legal Status]	Organisation legal status	Option List
1.2.19	[BD Other]	If you have answered 'Other' to the above question [BD Legal Status] please provide details here.	Text
1.2.20	[BD VAT]	VAT Registration Number (or alternative EU registration number)	Text
1.2.21	[BD DUN]	Dun and Bradstreet (D.U.N.S) number, if known, of registered office.	Text
1.2.22	[BD Company no.]	Please provide your company or charity registration number.	Text
1.2.23	[BD Parent]	Name of parent company (if applicable)	Text
1.2.24		Name of ultimate parent company (if applicable).	Text

Qualification Questionnaire: 1.3 Consortia & Subcontracting

	Question	Description	Question Type
	Consortia & Subcontracting	Please select how you intend to bid for this requirement from the following options:	Option List
		a) Your organisation is bidding to provide the entire requirement itself	
		b) Your organisation is bidding in the role of Prime Contractor and intends to use subcontractors to provide some of the requirement	
		c) The organisation is bidding as the lead member of a consortium	
1.3.2	Composition	If your answer to "Consortia & Subcontracting" was either option (b) or option (c) please indicate (by attaching a document against this question) the composition and governance of the supply chain, indicating which member of the supply chain will be responsible for the elements of the requirement.	Attachment

Qualification Questionnaire: 1.4 Criminal Convictions and Business Probity - Mandatory Exclusions

	Question	Description
1.4.1	BIDDERS GUIDANCE	Your ITT response will be rejected if you answer "Yes" to any of the questions within this section.
1.4.2		Failure to disclose information relevant to this section or misrepresentation in relation to the information disclosed will result in your exclusion from this procurement process or the termination of any subsequent contract that may be awarded to you.
	Convictions and	Please indicate if your organisation or its directors or any other person(s) having powers of representation, decision or control of your organisation has been convicted of any of the following offences.
	Question	Description Question Type

1.4.4		* the common law offence of conspiracy where that conspiracy relates to participation in a criminal organisation as defined in Article 2 of Council Framework Decision 2008//841/JHA or an offence under sections 28 or 30 of the Criminal Justice and Licensing (Scotland) Act 2010;	Option List (with response causing Supplier exclusion)
1.4.5		* corruption within the meaning of section 1(2) of the Public Bodies Corrupt Practices Act 1889 or section 1 of the Prevention of Corruption Act 1906, where the offence relates to active corruption as defined in Article 3 of the Council Act of 26th May 1997 and Article 3 (1) of the Council Joint Action 98/742/JHA;	Option List (with response causing Supplier exclusion)
1.4.6		Justice (Scotland) Act 2003 where the offence relates to active corruption, or	Option List (with response causing Supplier exclusion)
1.4.7	[CCBP Incitement]	* the common law offence of incitement to commit a crime;	Option List (with response causing Supplier exclusion)
1.4.8		European Communities as defined by Article 1 of the Convention relating to the	Option List (with response causing Supplier exclusion)
1.4.9	[CCBP Mon]		Option List (with response causing Supplier exclusion)
1.4.10	[CCBP Other]	* any other offence within the meaning of Article 45(1) of the Public Sector Directive as defined by the national law of any relevant state.	Option List (with response causing Supplier exclusion)

Qualification Questionnaire: 1.5 Criminal Convictions and Business Probity – Discretionary Exclusions

	Question	Description		
1.5.1	BIDDERS GUIDANCE	Your ITT response may be rejected if you answer "Yes" to any of the questions within this section		
1.5.2	BIDDERS GUIDANCE	Failure to disclose information relevant to this section or misrepresentation in relation to the information disclosed may result in your exclusion from this competition or the termination of any subsequent contract that may be awarded to you.		
1.5.3	Criminal Convictions and Business Probity	Please indicate if your organisation or its directors or any other person(s) having powers of repres decision or control of your organisation has been convicted of any of the following offences.		
	Question	Description	Question Type	
1.5.4	[CCBP Debt]	* Are you an individual in respect of whom a debt relief order has been made or is bankrupt or has had a receiving order or administration order or bankruptcy restriction order or a debt relief restriction order made against them or has made any composition or arrangement with or for the benefit of creditors or has made any conveyance or assignment for the benefit of creditors or appears unable to pay, or to have no reasonable prospect of being able to pay, a debt within the meaning of section 268 of the Insolvency Act 1986, or article 242 of the Insolvency (Northern Ireland) Order 1989, or in Scotland has granted a trust deed for creditors or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of your estate, or is the subject of any similar procedure under the law of any other state?		
1.5.5	[CCBP Insol]	* Are you a partnership constituted under Scots law that has been granted a trust deed or become otherwise apparently insolvent, or the subject of a petition presented for sequestration of your estate?	Option List	
1.5.6	[CCBP Order]	* Are you a company or any other entity within the meaning of section 255 of the Enterprise Act 2002 which has passed a resolution or is the subject of an order by the court for the company's winding up otherwise than for the purpose of bona fide reconstruction or amalgamation, or has had a receiver, manager or administrator on behalf of a creditor appointed in respect of the company's business or any part thereof or is the subject of the above procedures or is the subject of similar procedures under the law of any other state?	Option List	
1.5.7	[CCBP Crim]	* Has your organisation been convicted of a criminal offence relating to the conduct of its business or profession?	Option List	
1.5.8	[CCBP Miscon]	* Has the organisation committed an act of grave misconduct in the course of its business or profession?	Option List	
1.5.9	[CCBP Soc]	* Has your organisation failed to fulfil its obligations relating to the payment of social security contributions under the law of any part of the United Kingdom or the relevant State in which your organisation is established?	Option List	
1.5.10	[CCBP Tax]		Option List	
		the contracting authority?	Option List	
1.5.12	[CCBP Discret]	If you have answered "Yes" to any of the above discretionary exclusions then please state any remedial action you have taken.	Text	
		Guidance The Authority is entitled to exclude bidder(s) that cannot demonstrate to its satisfaction that appropriate remedial action has been taken to prevent future occurrences/breaches.		

Qualification Questionnaire: 1.6 For Completion by Non-UK Businesses ONLY

Question	Description	Question Type
[NON-UK Reg]	Is your business registered with the appropriate trade or professional register in the EU member state where it is established (as set out in Schedule 6 of the Public Contracts (Scotland) Regulations 2012) under the conditions laid down by that member state.	Option List
[NON-UK Serv]		Option List
	Is it a legal requirement in the State where you are established for you to be licensed or a member of a relevant organisation in order to provide the requirement in this procurement.	
	If you have answered "Yes" to question [NON-UK Serv], please provide details of what the requirement is in your member state and confirm that you comply with the requirement.	Text

Qualification Questionnaire: 1.7 Economic and Financial Standing

	Question	Description	
	BIDDERS GUIDANCE	Your financial accounts and supporting information should be in English and in Sterling. If the original accounts are not in English, please provide copies of the originals and a certified translation into the sums in accounts are not expressed in UK Sterling then copies of the original accounts shall be together with a UK Sterling rate equivalent copy utilising the pound buys exchange rate applicable of issue of the ITT.	English. If e provided on the date
	Question	Description	Question Type
1.7.2	[EFS Accounts 1]	Please provide one of the following:	Attachment
		a. A copy of your audited accounts or equivalent for the most recent 2 years, along with details of any significant changes since the last year end. An additional question has been provided below to enable you to upload your second set of accounts.	
		or	
		b. A statement of your organisation's turnover; profit and cash flow for the most recent full year of trading or where a full year trading has not been completed the same information for the period applicable. NOTE if this information is not available in an audited format please provide an end of period balance sheet or make the response specified in option (c) below.	
		or	
		c. If you are unable to provide the information requested above, please provide additional information and documentation that will give the Authority the assurance that you are capable of carrying out any subsequent awarded contract. For example, a statement of your organisation's cash flow forecast for the current year and a letter from your bank outlining the current cash and credit position or other alternative means of demonstrating financial standing.	
1.7.3	[EFS Accounts 2]	If you have a second set of accounts available please upload them here.	Attachment
1.7.4		If you would like to provide any additional information regarding the economic/financial standing of your organisation please upload it here.	Attachment
		For example provide a statement explaining why the organisation was not in net profit after tax in either of the reported financial years.	
	Question	Description	
	BIDDERS GUIDANCE	In the event that analysis of your financial position determines that additional measures are neces order to provide adequate assurance of financial strength, you may or may not be required to provparent company guarantee or a bank guarantee.	sary in vide either a

Qualification Questionnaire: 1.8 Economic and Financial Standing - Consortia

Question	Description	Question Type
Consort]	Where a consortium is proposed, one of the responses described in (a) through to (c) in question [EFS Accounts 1] is also required for each member of the consortium. Please provide this relevant information for each consortium member as one attachment or as a Zip file containing all relevant documents.	Attachment
	Guidance If you are not bidding as part of a consortium then please skip this question.	

Qualification Questionnaire: 1.9 Insurance Requirements

	Question	Description	
1.9.1	BIDDERS GUIDANCE	It is a requirement of this contract that bidders hold the levels of insuranc	e indicated below:
		Employer's (Compulsory) Liability Insurance* = £5m Public Liability Insurance = £5m *It is a legal requirement that all companies hold Employer's (Compulsory) as a minimum. IMPORTANT NOTE: This requirement is not applicable to So	Liability Insurance of £5m ole Traders.
1.9.2		Please confirm below whether you already have or can commit to obtain, pof the contract, the levels of insurance cover indicated. Bidders that do no commit to obtain, the required levels of insurance may be excluded from procurement exercise.	t already have, or cannot
	Question	Description	Question Type
1.9.3	Employer's (Compulsory) Liability Insurance	* Employer's (Compulsory) Liability Insurance	Option List

1.9.4 Public Liability	* Public Liability Insurance	Option List
Insurance		•

Qualification Questionnaire: 1.10 Insurance

Question	Description	Question Type
[INS Emp Lia Cert]	If available, please provide a copy of your current Employer's Liability Insurance certificate.	Attachment
	This should include the name of the insurers, policy numbers, expiry dates and limits for any one incident and annual aggregate caps and the excesses under the policies.	
[INS Pub Lia Cert]	If available, please provide a copy of your current Public Liability Insurance certificate.	Attachment
	This should include the name of the insurers, policy numbers, expiry dates and limits for any one incident and annual aggregate caps and the excesses under the policies.	

Qualification Questionnaire: 1.11 Conflict of Interest

	Question	Description	
	Guidance	Where potential conflict of interest are identified and cannot be managed or avoided to the Authority's satisfaction, the Authority may, in exceptional circumstances, exclude the bidder from further participation in the procurement exercise. For example, it may not be possible to take forward a bidder that intends to act as both the project manager and contractor, or a significant member of the supply chain delivering the contract	
	Question	Description	Question Type
1.11.2	Conflicts]	* Are you aware of any actual or potential conflicts of interest between the Authority and the bidder either during this procurement exercise or, should your bid be successful, the delivery of the contract?	Option List
1.11.3		If the answer to the above question is "Yes" please provide details and explain how you intend to manage, or where possible avoid, any such conflicts.	Text

Qualification Questionnaire: 1.12 Technical or Professional Ability

	Question	Description	
	BIDDERS GUIDANCE	Bidders are required to provide evidence of having the necessary capacity and capability to deliverequirement.	ver the
		In order to ensure that newer or start-up companies have a chance to demonstrate any experient to the current requirement, examples may be provided from:	nce relevant
		- Within their own organisation (bidders may rely on the experience of personnel that they intercarry out the current requirement, even if that experience was gained whilst working for a differorganisation).	
		– Other consortium members (where a consortium bid is being proposed).	
		- Named sub-contractors (where sub-contractors are being used and their identity is known at stage).	the ITT
		Bidders should be aware that there should be no material change to the skills experience and reavailable to them during the course of the contract.	
	Question		Question Type
1.12.2	[Tech Exp]	* Please download and complete the attached template provided here.	Attachment
		Use the template to provide up to 2 examples that demonstrate to the Authority experience that is relevant to this procurement exercise. Your examples must be from within the last three years for goods and services and within the last 5 years for works contracts.	
		Your completed response should be no more than 2 pages of A4. You MUST upload the completed document next to this question.	
		NOTE: If you are unable to provide any examples you MUST still complete part of this template and upload your response, explaining why you cannot provide examples.	
1.12.3	[Tech Confirm]	If available, please provide copies of completion certificates or customers' written declaration which validate the examples you have provided in answer to question [Tech Exp].	Attachment
		Guidance Buyers should not score this question or mark you down if you cannot provide certificates or customer declarations. However, if you cannot provide either the Authority may choose to contact customers cited directly in order to validate the experience examples you have provided without any further reference to you.	
1.12.4	[Tech Skills]	Please provide a statement of the relevant professional and technical skills available within your organisation; or where applicable, consortium members and/or named sub-contractors in relation to this procurement exercise.	Attachment
		Guidance The buyer will use the information you provide to evaluate whether your organisation; consortium members and/or named sub-contractors have the relevant professional and technical skills required for this procurement exercise.	

1 10 5 5 1		A 1 .
1.12.5 [Tech	Please provide a statement of the relevant technical resources such as the tools, plant, facilities	Attachment
Resources	and technical equipment available to your organisation, or where applicable, consortium	
[Kesources]		
	members and/or named sub-contractors in relation to this procurement exercise.	
	Guidance	
	The buyer will use the information you provide to evaluate whether your organisation;	
	consortium members and/or named sub-contractors have the relevant technical resources for	
	this procurement exercise.	

Qualification Questionnaire: 1.13 Equal Opportunities

	Question	Description	Question Type
1.13.1	[EO Discrim]	* In the last three years, has any finding of unlawful discrimination been made against your organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or in comparable proceedings in jurisdiction other than the UK)?	Option List
	[EO Discrim Rem]	If you have answered "Yes" to the question [EO Discrim], please provide a summary of the findings or judgement and explain what action you have taken to prevent similar unlawful discrimination from reoccurring. Guidance The Authority will exclude bidder(s) that have been found to have unlawfully discriminated in the last three years unless the bidder(s) can demonstrate to the Authority's satisfaction that appropriate remedial action has been taken to prevent similar unlawful discrimination reoccurring.	Text
1.13.3		* In the last three years, has your organisation had a complaint upheld following a formal investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in a jurisdiction other than the UK), on grounds of alleged unlawful discrimination?	Option List
	Complaint	If you answered "Yes" to question [EO Complaint] provide a summary of the nature of the investigation and an explanation of the outcome (so far) of the investigation. If the investigation upheld the complaint against your organisation, provide an explanation of what action (if any) you have taken to prevent unlawful discrimination from reoccurring. Guidance The Authority will exclude bidder(s) that have had a complaint upheld following an investigation unless the bidder(s) can demonstrate to the Authority's satisfaction that appropriate remedial action has been taken to prevent similar unlawful discrimination reoccurring.	Attachment

Qualification Questionnaire: 1.14 Quality Management

	Question	Description	Question Type
1.14.1	[QM Comms]	Explain how you manage communication with your clients to ensure continued delivery of a service or product that meets their needs. You should be able to demonstrate that your organisation communicates with your clients e.g. planned reviews, ad hoc meetings, and processes for communicating actions on a proactive basis.	Text
1.14.2	[QM Choice]	* Please confirm/select how you intend to answer the remainder of the Quality Management section.	Option List
		Your choices are either:	
		1) If you do NOT have a quality management system certified to an international, European or equivalent standard, skip question [QM Certicate] and answer any remaining questions in this section.	
		Or	
		2) If you operate a quality management system certified to an international, European or equivalent standard attach a copy of your certificate against question [QM Certificate].	
1.14.3	[QM Certificate]	If your organisation operates a quality management system certified to an international, European or equivalent standard (e.g. BS EN ISO 9001) please attach a copy of the certificate here.	Attachment
		If you have been able to attach a copy of your organisation's certification to international, European or equivalent standard, (e.g. BS EN ISO 9001) then YOU ARE NOT REQUIRED TO ANSWER ANY OF THE REMAINING QUESTIONS (BELOW) IN THIS SECTION.	
1.14.4	[QM Policy]	If your organisation has a documented policy regarding quality management, please attach a copy.	Attachment
		Guidance	
		The policy should set out your organisation's responsibilities for quality management.	
		Demonstrating that your organisation has and continues to implement a quality management policy that is authorised by the Chief Executive or equivalent and is periodically reviewed at a	
		senior management level. The policy should be relevant to the nature and scale of the work to be undertaken and set out responsibilities for quality management throughout the organisation.	

Qualification Questionnaire: 1.15 Contract Termination

	Question	Description	Question Type
1.15.	-	* Have you, either as a supplier or in the supply chain, been involved in the provision of any contract in the last 3 years for goods and services and 5 years for works, where the contract has been terminated or payment has been withheld because your performance was not satisfactory.	Option List

1.15.2			Option List
		Guidance If you are not bidding as a consortium you MUST still answer this question by selecting the option – "Not applicable – not a consortium bid" from the options list.	
1.15.3	[CT Rem]	If you have answered "Yes" to either question [CT] or [CT Consort] please provide details regarding the circumstances of the termination and details of any remedial action that was carried out as a result of the termination.	Text
		Guidance The Authority will not select bidder(s) that cannot demonstrate to its satisfaction that appropriate remedial action has been taken to prevent future occurrences.	
		Where a consortium bid is proposed this information should be provided for any consortium member(s) to whom it applies.	

Technical Questionnaire

General Attachments	
Allowed	
Technical Envelope	
2.1 Technical Questions (Questions: 7)	
2.2 General Attachments	

Technical Score Weight = 30%

Technical Questionnaire: 2.1 Technical Questions – Section Weight = 100%

	Question	II Jescription		Question Weight
2.1.1	Experience and relevant knowledge	* Please describe your Organisation's experience in providing insurance, claims handling and risk management services to local authorities.	Text	15%
2.1.2	Staffing	* Please provide details of names, qualifications and experience of the team of employees who will be responsible for the delivery of services to the Council.	Text	5%
2.1.3	Technical Knowledge	* Please provide information to demonstrate the technical knowledge that will be available to support this contract.	Text	15%
2.1.4	Scope of Cover	* Please provide a description of the scope of cover for each of the classes of insurance required. Bidder response should be uploaded as an attachment.	Attachment	20%
2.1.5	Support	* Please describe how you will co-operate and develop a working partnership, together with ongoing support, both with the Council, and its advisers where appropriate.	Text	15%
2.1.6	Added Value	* Please describe any "added value" components available, particularly in relation to risk management.	Text	10%
	Contract Administration	* Please describe how you will administer this contract ensuring the ability to undertake electronic exchange of data with the Council.	Text	20%

Commercial Questionnaire

Allow Attachments in Supplier responses				
Allowed				
New TCO Column Header	TCO Visible to Suppliers			
	No			

Commercial Envelope
3.1 Commercial Envelope Evaluation (Items 0)
3.2 Q1A: Property (Material Damage): Housing (Items 6 , Columns: 2)
3.3 Q1A: Property (Material Damage): Education (Items 6 , Columns: 2)
3.4 Q1A: Property (Material Damage): General (Items 6 , Columns: 2)
3.5 Q1A: Property (Material Damage): Timber (Items 6 , Columns: 2)
3.6 Q1B: Business Interruption: Additional Expenditure (Items 8, Columns: 2)
3.7 Q1C: Works in Progress: All Risks (Items 2 , Columns: 2)
3.8 Q1D: Money (Items 2 , Columns: 2)
3.9 Q1E: All Risks (Items 2 , Columns: 2)
3.10 Q1F: Industrial and Commercial Leased Properties (Items 4 , Columns: 2)
3.11 Q2A: Employers Liability (Items 6 , Columns: 3)
3.12 Q2B: Public Liability (Items 6 , Columns: 3)
3.13 Q2C: Libel and Slander (Items 2 , Columns: 2)
3.14 Q2D: Officials Indemnity (Items 6 , Columns: 3)
3.15 Q3: Motor (Items 3 , Columns: 2)

3.16 Q4A: Engineering (Items 2 , Columns: 2)
3.17 Q4B: Contractors Plant (Items 2 , Columns: 2)
3.18 Q4C: Engineering Inspection Service (Items 1)
3.19 Q5A: Fidelity Guarantee (Items 2 , Columns: 2)
3.20 Q5B: Computer (Items 2 , Columns: 2)
3.21 Q5C: Personal Accident (Items 12 , Columns: 2)
3.22 Q5D: Travel (Items 2 , Columns: 2)
3.23 Q5E: School Journeys (Items 1 , Columns: 1)
3.24 Q6: Marine (Items 1 , Columns: 3)
3.25 Q7: Claims Handling (Items 1, Columns: 2)
3.26 General Attachments

Commercial Questionnaire: 3.1 Commercial Envelope Evaluation

Reference	Description
3.1.1 Commercial Envelope Evaluation	The tender evaluation process will be conducted in a manner which aims to ensure that tenders are evaluated fairly and to ascertain the tender which offers the best value to the Council. The award criteria will be based on criteria which when used together with the Techncial Envelope score, provides evidence that the successful tender is the most economically advantageous to the Council. The Council does not bind itself to accept the lowest priced tender.

Commercial Questionnaire: 3.2 Q1A: Property (Material Damage): Housing

	Reference	Description	Show remarks	Unit of Measurement	Quantity	Reference Price	Maximum Unit Price
3.2.1	Nil – all perils	Quote for the above deductible	No	Price	6,040		
3.2.2	£5,000 all perils	Quote for the above deductible	No	Price	6,040		
3.2.3	£10,000 all perils	Quote for the above deductible	No	Price	6,040		
3.2.4	£25,000 all perils	Quote for the above deductible	No	Price	6,040		
	Nil excluding flood	Quote for the above deductible	No	Price	6,040		
3.2.6	£5,000 all perils excluding flood	Quote for the above deductible	No	Price	6,040		

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.3 Q1A: Property (Material Damage): Education

	Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Reference Price	Maximum Unit Price
3.3.1	Nil - all perils	Quote for the above deductible		No	Price	52		
	£5,000 - alll perils	Quote for the above deductible		No	Price	52		
	£10,000 - all perils	Quote for the above deductible		No	Price	52		
	£25,000 - all perils	Quote for the above deductible		No	Price	52		
	Nil excluding flood	Quote for the above deductible		No	Price	52		
	£5,000 all perils excluding flood	Quote for the above deductible		No	Price	52		

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.4 Q1A: Property (Material Damage): General

Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Reference Price	Minimum Unit Price	Maximum Unit Price
3.4.1 Nil all perils	Quote for the above deductible		No	Price	165			
3.4.2 £5,000 all perils	Quote for the above deductible		No	Price	165			
3.4.3 £10,000 all perils	Quote for the above deductible		No	Price	165			
3.4.4 £25,000 all perils	Quote for the above deductible		No	Price	165			
3.4.5 Nil excluding flood	Quote for the above deductible		No	Price	165			
3.4.6 £5,000 all perils excluding flood	Quote for the above deductible		No	Price	165			

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.5 Q1A: Property (Material Damage): Timber

Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Reference Price	Minimum Unit Price	Maximum Unit Price
3.5.1 Nil all perils	Quote for the above deductible		No	Price	0			
3.5.2 £5,000 all perils	Quote for the above deductible		No	Price	0			
3.5.3 £10,000 all perils	Quote for the above deductible		No	Price	0			
3.5.4 £25,000 all perils	Quote for the above deductible		No	Price	0			
3.5.5 Nil excluding flood	Quote for the above deductible		No	Price	0			
3.5.6 £5,000 all perils excluding flood	Quote for the above deductible		No	Price	0			

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.6 Q1B: Business Interruption: Additional Expenditure

Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Reference Price	Minimum Unit Price	Maximum Unit Price
3.6.1 24 Month Indemnity Period: £1m Deductible	Quote for the above		No	Price	0			
3.6.2 24 Month Indemnity Period: Deductible: Bidders	Price for bidders deductible for 24 month period		No	Price	0			
3.6.3 24 Month Indemnity Period: £1m Aggregate	Quote for the above		No	Price	0			
3.6.4 24 Month Indemnity Period: Aggregate: Bidders	Price for bidders aggregate for 24 month period		No	Price	0			
3.6.5 36 Month Indemnity Period: £1m Deductible	Quote for the above		No	Price	0			
3.6.6 36 Month Indemnity Period: Deductible: Bidders	Price for bidders deductible for 36 month period		No	Price	0			
3.6.7 36 Month Indemnity Period: £1m Aggregate	Quote for the above		No	Price	0			
3.6.8 36 Month Indemnity Period: Aggregate: Bidders	Price for bidders aggregate for 24 month period		No	Price	0			

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.7 Q1C: Works in Progress: All Risks

	Reference	Description	Item Remarks		Unit of Measurement	Quantity	Minimum Unit Price	Maximum Unit Price
3.7.1	Cover	Quote for Works in Progress – All Risks based on information provided in Appendix 2.		No	Price	0		
		Bidders option for the provision of cover for Works inProgress – All Risks		No	Price	0		

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.8 Q1D: Money

	Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Minimum Unit Price	Maximum Unit Price
		Quote based on existing risk as detailed in appendices		No	Price	0		
3.8.2		Bidders option for the provision of service.		No	Price	0		

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.9 Q1E: All Risks

	Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Reference Price	Minimum Unit Price	Maximum Unit Price
3.9	0.1 Existing Cover	Quote based on existing provision.		No	Price	0			
3.9	0.2 Bidders Option	Bidders alternative		No	Price	0			

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.10 Q1F: Industrial and Commercial Leased Properties

	Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Minimum Unit Price	Maximum Unit Price
3.10.1	Expiring Deductible	Quote based on expiring deductible as detailed in appendices.		No	Price	0		
3.10.2	Deductible excluding	Quote based on expiring deductible but excluding Storm £5,000 at as detailed in appendices.		No	Price	0		
3.10.3	£5,000 All Perils	Quote based on £5,000 All Perils as detailed in appendices.		No	Price	0		
3.10.4	Bidders Option	Bidders own option		No	Price	0		

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.11 Q2A: Employers Liability

	Reference		Show remarks	Unit of Measurement	Quantity	Reference Price	Maximum Unit Price
3.11.1	·	Quote for Employers Liability with £25,000,000 indemnity limit and excess of £5,000	No	Price	0		
3.11.2	·	Quote for Employers Liability with £25,000,000 indemnity limit and excess of £50,000	No	Price	0		
3.11.3	·	Quote for Employers Liability with £40,000,000 indemnity limit with excess of £5,000	No	Price	0		
3.11.4	·	Quote for Employers Liability with £40,000,000 indemnity limit with excess of £50,000	No	Price	0		
3.11.5	Option E	Bidders option	No	Price	0		
3.11.6	Option F	Bidders option	No	Price	0		

Sum Insured/Base	Excess	Indemnity Limit
(View & Edit)	5,000 (View & Edit)	(View & Edit)

Commercial Questionnaire: 3.12 Q2B: Public Liability

	Reference	Description	Show remarks	Unit of Measurement	Quantity		Maximum Unit Price
3.12.1		Quote for Public Liability with indemnity limit of £20,000,000 and excess of £1,000	No	Price	0		
3.12.2		Quote for Public Liability with indemnity limit of £20,000,000 and excess of £50,000	No	Price	0		
3.12.3		Quote for Public Liability with indemnity limit of £40,000,000 and excess of £1,000	No	Price	0		
3.12.4	Option D	Quote for Public Liability with indemnity limit of £40,000,000 and excess of £50,000	No	Price	0		
		Bidders own option	No	Price	0		
3.12.6	Option F	Bidders own option	No	Price	0		

9	Sum Insured/Base	Excess	Indemnity Limit
	(View & Edit)	1,000 (View & Edit)	(View & Edit)

Commercial Questionnaire: 3.13 Q2C: Libel and Slander

	Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity		Maximum Unit Price
3.13	1 Existing Cover	Quote based on existing terms.		No	Price	0		
3.13	2 Bidders Option	Bidders option for the provision of cover for libel and slander.		No	Price	0		

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.14 Q2D: Officials Indemnity

	Reference	Description		Unit of Measurement	Quantity	Minimum Unit Price	Maximum Unit Price
3.14.1		Quote for Officials Indemnity with indemnity limit of £1,000,000 and excess of £5,000	No	Price	0		
3.14.2	Option B	Quote for Officials Indemnity with indemnity limit of £1,000,000 and excess of £25,000	No	Price	0		
3.14.3	Option C	Quote for Officials Indemnity with indemnity limit of £5,000,000 and excess of £5,000.	No	Price	0		
3.14.4	Option D	Quote for Officials Indemnity with indemnity limit of £5,000,000 and excess of £25,000.	No	Price	0		
3.14.5	Option E	Bidders option	No	Price	0		
3.14.6	Option F	Bidders option	No	Price	0		

Sum Insured/Base	Excess	Indemnity Limit
(View & Edit)	(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.15 Q3: Motor

	Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Reference Price	Maximum Unit Price
3.15.		Quote for Motor insurance		No	Price	0		
3.15.	Option B	Quote for Motor insurance		No	Price	0		
3.15.	Option C	Bidders own option		No	Price	0		

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.16 Q4A: Engineering

	Reference	Description	Item Remarks		Unit of Measurement	Quantity	Reference Price	Minimum Unit Price	Maximum Unit Price
	Cover	Quote based on existing terms of cover		No	Price	0			
3.16.2	Bidders Option	Bidders own option		No	Price	0			

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.17 Q4B: Contractors Plant

	Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Reference Price	Minimum Unit Price	Maximum Unit Price
3.17.1		Quote based on existing terms of cover		No	Price	0			
3.17.2	Bidders Option	Bidders own option		No	Price	0			

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.18 Q4C: Engineering Inspection Service

	Reference	Description		Unit of Measurement	Quantity	Reference Price	 Maximum Unit Price
3.18.1		* Details of fees	No	Price	0		

Commercial Questionnaire: 3.19 Q5A: Fidelity Guarantee

	Reference		ltem Remarks	Show remarks	Unit of Measurement	Quantity		Maximum Unit Price
3.19.1		Quote base on existing cover		No	Price	0		
3.19.2	Bidders Option	Bidders own option		No	Price	0		

Sum Insured/Base	Excess
500,000 (View & Edit)	(View & Edit)

Commercial Questionnaire: 3.20 Q5B: Computer

	Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Minimum Unit Price	Maximum Unit Price
3.20.1		Quote based on existing cover		No	Price	0		
3.20.2	Bidder Option	Bidders own option		No	Price	0		

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.21 Q5C: Personal Accident

	Reference	Description							
3.21.1	Category of personnel	For definitions of perso Programme	nnel categ	ories, plea	ase see entry for			in Appendix	2: Insurance
	Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Reference Price	Minimum Unit Price	Maximum Unit Price
3.21.2	Category A: Existing cover	Quote based on existing cover for Category A personnel		No	Price	0			
3.21.3	Category A: Bidder Option	Bidders own option for Category A personnel.		No	Price	0			
3.21.4	Category B: Existing cover	Quote based on existing cover for Category B personnel		No	Price	0			
3.21.5	Category B: Bidder Option	Bidders own option for Category B personnel.		No	Price	0			
3.21.6	Category C:	Quote based on existing cover for Category C personnel		No	Price	0			
3.21.7	Category C: Bidder Option	Bidders own option for Category C personnel.		No	Price	0			
3.21.8	Category D: Existing cover	Quote based on existing cover for Category D personnel		No	Price	0			
3.21.9	Category D: Bidder Option	Bidders own option for Category D personnel.		No	Price	0			
3.21.10	Category E: Existing cover	Quote based on existing cover for Category E personnel		No	Price	0			
3.21.11	Category E: Bidder Option	Bidders own option for Category E personnel.		No	Price	0			
		Quote based on existing cover for Category F personnel		No	Price	0			
3.21.13	Category F: Bidder Option	Bidders own option for Category F personnel.		No	Price	0			

Sum Insu	red/Base	Excess
(View & E	dit)	(View & Edit)

Commercial Questionnaire: 3.22 Q5D: Travel

	Reference	Description	Item Remarks	Show remarks	Unit of Measurement		Minimum Unit Price	Maximum Unit Price
		Quote based on existing cover		No	Price	0		
3.22.2	Bidder Option	Bidders own option		No	Price	0		

Sum Insured/Base	Excess
(View & Edit)	(View & Edit)

Commercial Questionnaire: 3.23 Q5E: School Journeys

	Reference	Description	Item Remarks	Show remarks	Unit of Measurement	Quantity	Minimum Unit Price	Maximum Unit Price
3.23	.1 Existing	Quote based on		No	Price	0		
	Cover	existing cover						

Comp. Incomp. of / Dogg	
Sum Insured/Base	
(View & Edit)	

Commercial Questionnaire: 3.24 Q6: Marine

Reference	Description								
Marine Insurance	Marine insurance is an optional provision and bidders are requested to advise whether they can provide it or not and if Yes, what rates will apply. This section will not be included in the scoring of the Commercial envelope.								
Reference	Description			Unit of Measurement				Maximum Unit Price	
	Bidders are invited to propose their own option.		No	Price	0				

* Can provide marine insurance	Sum Insured/Base	Excess	
(View & Edit)	(View & Edit)	(View & Edit)	

Commercial Questionnaire: 3.25 Q7: Claims Handling

Reference	Description							
Claims Handling	Bidders are asked to clearly state their proposals for claims handling and identify the associated costs indicating whether the full cost of such services is contained within the premium quoted. Description Item Show Unit of Quantity Reference Minimum Maximum Measurement Quantity Reference Unit Price Uni							
Reference	Description			Unit of Measurement	Quantity	Reference Price	Minimum Unit Price	Maximum Unit Price
Handling	Quote for claims handling fee where claims handling is not included in preceding quotes.		No	Price	0			

* Is claims handling included in above quotes?	Claims Handling Proposals
(View & Edit)	Bidders to detail their proposals for claims handling. (View & Edit)

Contract - Overview

Contract Code	Contract Type	Organisation Name	Total Value of Contract	Currency	Start / Signature Date	End / Delivery Date
ecm_3965	Category C	Zurich Municipal	5,518,610	GBP	01/04/2014	31/03/2017