



**Crown
Commercial
Service**

INVITATION TO TENDER

FOR

RM4622 L0750 – INSURANCE ADVISOR FOR PFI ARRANGEMENTS

Version 1.0

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Author: **REDACTED**

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Invitation to Tender**

1. INTRODUCTION

- 1.1 This Invitation to Tender relates to the Procurement to award a provision of an Insurance Advisor for PFI Arrangements Contract to a sole Supplier.
- 1.2 This ITT contains the information and instructions the Potential Provider needs to submit a Tender.
- 1.3 The contract will be for a duration of 2 months.
- 1.4 This Contract is being offered under CROWN COMMERCIAL SERVICE Framework RM958 Insurance Services Lot 2. The Framework terms and conditions will govern any resultant contract.
- 1.5 Crown Commercial Service is using an e-Sourcing Portal to manage this Procurement, therefore your Tender must be submitted via this means.
- 1.6 Crown Commercial Service reserves the right to run a reverse auction on this requirement.

2. OVERVIEW OF INVITATION TO TENDER

- 2.1 The following appendices accompany this ITT:

- 2.1.1 **Appendix A – Terms of the Procurement**

- Sets out rights and obligations which apply to the Potential Provider and the Crown Commercial Service during this Procurement.

- 2.1.2 **Appendix B – Service Description**

- A detailed description of the services that the Supplier will be required to supply to the Authority.

- 2.1.3 **Appendix C – Terms and Conditions of Contract**

- Sets out the RM958 framework terms and conditions of Contract that will exist between the Authority and the Supplier.

- 2.1.4 **Appendix D – Response Guidance**

- A template containing questions which the Potential Provider is required to respond to.

3. TENDER RESPONSES

- 3.1 Potential Providers **must** submit their proposals/answer all questions via the e-sourcing portal as outlined in Appendix D – Response Guidance.
- 3.2 Potential Providers **must not** submit any additional information with their Tender other than that specifically requested in Appendix B – Service Description or Appendix D – Response Guidance.
- 3.3 Potential Providers must ensure they select the ‘Submit all draft bids’ icon in order for their response to be submitted. Failure to select this option will mean that the bid remains in a ‘draft’ status and will therefore not be considered.

4. PROCUREMENT TIMETABLE

- 4.1 The timetable for this Procurement is set out in the table below.
- 4.2 This timetable may be changed by the Crown Commercial Service at any time. The Potential Provider will be informed through the e-Sourcing Portal if changes to this timetable are necessary.

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DATE	ACTIVITY
11/03/2015	Publication of the ITT
11/03/2015	Clarification period starts
18/03/2015 17:00 hrs	Clarification period closes (“ Tender Clarifications Deadline ”)
20/03/2015 17:00 hrs	Deadline for a response to the clarification questions
24/03/2015 16:00 hrs	Deadline for submission of a Tender to the Crown Commercial Service (“ Tender Submission Deadline ”)
30/03/2015	Supplier interviews/clarification meetings (if required)
02/04/2015	Expected award date of contract
07/04/2015	Anticipated contract commencement date

4.3 The Authority reserves the right to interview / invite to presentations up to the top three Potential Providers based on overall score. These will be held on 30th March 2015 at 1 Horseguards Road, London, SW1 2HQ.

5. QUESTIONS AND CLARIFICATIONS

5.1 Potential Providers may raise questions or seek clarification regarding any aspect of this Procurement at any time prior to the Tender Clarification Deadline. Questions must be submitted via the e-sourcing suite.

5.2 Crown Commercial Service will not enter into exclusive discussions regarding the requirements of this Procurement with Potential Providers.

5.3 To ensure that all Potential Providers have equal access to information regarding this Procurement, the Crown Commercial Service will publish all its responses to questions raised by Potential Providers on an anonymous basis.

5.4 Responses will be published in a Questions and Answers document to all companies invited to tender.

5.5 At times the Crown Commercial Service may issue communications to the email address for the tender contact provided in Appendix D (Response Guidance), therefore please ensure that this mailbox is reviewed on a regular basis.

6. PRICE

6.1 Prices should be submitted in pounds sterling inclusive of any expenses but should exclude VAT.

6.2 Potential Providers are required to complete the bid fields within the e-sourcing suite which provides a total fixed price for the delivery of the requirement as well as providing a transparent breakdown within the price questionnaire.

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7. SUBMITTING A TENDER

- 7.1 Potential Providers should submit their Tender via the e-Sourcing portal that Crown Commercial Service has used during the Procurement unless otherwise stated.
- 7.2 If Potential Providers experience any technical difficulties uploading their Tender, the e-Enablement Team at Crown Commercial Service must be contacted immediately via eEnablement@ccs.gsi.gov.uk or 0345 410 2222.
- 7.3 Potential Providers are responsible for all costs incurred in submitting a tender for this requirement irrespective of a contract award.

8. TENDER EVALUATION

- 8.1 Tenders will be evaluated in line with the Marking Scheme set out in Appendix D (Response Guidance).
- 8.2 For reference an Evaluation Guidance document has been provided to Potential Providers to ensure full understanding of how Tenders are to be evaluated by the evaluation teams.
- 8.3 Upon completion of the evaluation, the marks obtained by the Potential Provider for each question will be converted into a “**Question Score**”, this is a percentage of the Total Score Available as indicated in the Marking Scheme for the specific question.
- 8.4 The Question Scores will be added together to determine an overall “**Total Score**” for the Potential Provider.
- 8.5 The Total Score Available for each question set out in Appendix D (Response Guidance) is as follows:

QUESTION NUMBER	QUESTION	TOTAL SCORE AVAILABLE	WEIGHTINGS %
1	Company Information	Information Only	N/A
2	Tender Contact	Information Only	N/A
3	Mandatory Requirements	Pass / Fail	N/A
4	Capability and Experience	300	40%
5	Methodology and Service Delivery	400	30%
6	Price	100	30%
Total		800	100%

9. CONTRACT AWARD

- 9.1 The Potential Provider that achieves the highest total score will be awarded the Contract.
- 9.2 If two or more Potential Providers obtain the highest total score, the Potential Provider with the highest score for the ‘Capability and Experience’ element will be deemed the winner and awarded the Contract.

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9.3 If the Authority receives only one Tender in relation to this Procurement, the Potential Provider will be awarded the Contract provided that they meet the Minimum Total Score of 60.

10. PROCUREMENT CONTACT

10.1 The procurement lead for this requirement is:

10.1.1 Name: **REDACTED**

10.1.2 Telephone Number: **REDACTED**

10.1.3 Email: **REDACTED**

11. GLOSSARY

11.1 In this ITT the following words and phrases have the following meanings:

“Authority” means HM Treasury;

“Contract” has the meaning set out in Appendix C (Terms and Conditions of Contract);

“e-Sourcing Portal” means the online tender management system which is being used by the Crown Commercial Service for this Procurement which can be found at: <https://gpsesourcing.cabinetoffice.gov.uk/sso/jsp/login.jsp>;

“Crown Commercial Service” means a trading fund of the Cabinet Office whose offices are located at 3rd Floor, 1 Horse Guards Road, London, SW1A 2HQ;

“Invitation to Tender” or **“ITT”** means this invitation to tender document and all related documents published by the Crown Commercial Service in relation to this Procurement;

“Marking Scheme” means the range of marks that may be given to a Potential Provider depending on the quality of its response to a question which is located in the boxes below the applicable question;

“Minimum Total Score” means the minimum score that the Potential Provider must obtain in order to be awarded the Contract;

“Total Score Available” means the maximum potential score that can be awarded for a response to a question;

“Potential Provider” means a company that submits a Tender in response to the Invitation to Tender;

“Procurement” means the process used to establish a Contract that facilitates the provision of Insurance Advisor for PFI Arrangements;

“Supplier” means the Potential Provider with whom the Authority has concluded the Contract;

“SME” means an organisation or entity:

- (a) having less than 250 employees; and
- (b) having an annual turnover of less than forty million pounds (£40,000,000); or
- (c) having a balance sheet of less than thirty five million pounds (£35,000,000); and
- (d) is totally independent of other enterprises; or

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- (e) holds less than 25% of the capital or voting rights in one or more other enterprises and other enterprises do not each own more than 25% of its capital or voting rights;

“Tender Clarifications Deadline” means the time and date set out in paragraph 4 for the latest submission of clarification questions;

“Tender Submission Deadline” means the time and date set out in paragraph 4 for the latest uploading of Tenders; and

“Tender” means the Potential Provider’s formal offer in response to the Invitation to Tender.