

**INVITATION TO TENDER**

**TENDER INSTRUCTIONS RELATING TO THE PROVISION OF INSURANCE**

**BROKER SERVICES FOR THE LEASEHOLD ADVISORY SERVICE &**

**LEASE CONFERENCES LTD**

## 1. **ABOUT THE LEASEHOLD ADVISORY SERVICE (LEASE)**

- 1.1 The Leasehold Advisory Service (LEASE) was set up in 1994 to provide free information, initial advice and guidance to members of the public about residential leasehold and park homes law. We have been providing this valuable service for more than 20 years. As the first point of contact for leaseholders, we are independent and impartial and all of our advisers are legally qualified. Since 2005, LEASE has provided this service as a public body.
- 1.2 The service LEASE provides to leaseholders gives us a unique insight into their current concerns and issues; insight that is of value to lawyers, managing agents and other professionals working in the sector. Any revenue from the advice line for these professionals, and from our training services, goes to support our free service for leaseholders.

## 2. **INVITATION TO TENDER (ITT)**

- 2.1 LEASE now invites Tenders for the provision of Insurance Broker Services for the insurances listed below:
- 2.2 Directors and Officers – including:
- Management Liability
  - Corporate Liability
  - Employment Practices
  - Entity Defence
  - Fidelity of Employees
- 2.3 Professional Indemnity
- 2.4 Office Package – including:
- Buildings decoration
  - Contents
  - Business Records
  - Computer Equipment
  - Money - in safe
  - Any other money
  - Business interruption
  - Book debts
  - Employers Liability
  - Public & Products Liability
  - Commercial Legal Protection

### **3. EXPRESSIONS OF INTEREST**

- 1.1 **Suppliers wishing to tender are requested to register their expression of interest by emailing [admin@lease-advice.org](mailto:admin@lease-advice.org) by 17:00 Friday 16 June 2017.**

### **4. DISCLAIMER COSTS AND EXPENSES AND DISCONTINUANCE OF TENDER**

- 4.1 Nothing in this ITT binds LEASE to accept a Tender and award a contract. LEASE reserves the right to discontinue this Tender at any time during the ITT process and not to accept a Tender or award a contract.
- 4.2 LEASE shall not be liable to the Tenderer in any way whatsoever for the Tenderer's costs and expenses incurred during the tender process from its discontinuance or in relation to which a contract is not awarded.
- 4.3 The Tenderer is responsible for preparing all information necessary for the preparation of its Tender and all costs, expenses and liabilities incurred by the Tenderer in connection with the preparation and submission of its Tender shall be borne by the Tenderer.
- 4.4 Tenderers shall ensure that they are familiar with the nature and extent of the obligations they will incur if their Tender is accepted.

### **5. FREEDOM OF INFORMATION AND TRANSPARENCY**

- 5.1 Under the Freedom of Information (FOI) Act 2000 and the Environmental Information Regulations 2004 the public have a general right of access to information held by LEASE. This right of access to information not only includes information about LEASE contracts but also procurement arrangements with potential Tenderers. This right does not extend to information which is confidential and/or commercially sensitive or otherwise exempt from disclosure under FOI. As a consequence, only information that is genuinely confidential or commercially sensitive or is otherwise exempt FOI information may not be disclosed under FOI.
- 5.2 Tenderers are therefore required to identify those areas in their Tender that they consider are confidential and/or commercially sensitive, giving reasons and evidence (where relevant) including proposed dates for lifting confidentiality in respect of those areas. The extent to which this information shall be held in confidence by LEASE and for how long may be subject to discussion as part of the Tender process and during post-tender negotiations (if any). Unsuccessful Tenders will be disposed of in accordance with LEASE's document retention and disposal policy.
- 5.3 LEASE reserves the right to hold all or any information contained in a Tenderers' Tender in confidence, or to disclose it whether or not it is

identified as commercially sensitive by the Tenderer where confidentiality or disclosure is necessary to comply with LEASE's legal duties and lawful discretion generally or in relation to the tender process.

## 6. TENDER EVALUATION

6.1 LEASE reserves the right not to accept the lowest or any Tender.

6.2 LEASE will carry out a Tender evaluation after the closing date for receipt of Tenders. Tenders will be evaluated on the basis of the most economically advantageous offer to LEASE having given due consideration to quality and price.

### Price and overall cost of the contract to LEASE (40 %)

Price Criteria	Score (Max 5)
Price	
Added Value Services	
<b>Total</b>	

### Quality of service provision (60 %)

Quality Criteria	Score (Max 5)
Demonstrable understanding and knowledge of the insurance market	
Corporate Chartered Insurance Brokers status by the Chartered Insurance Institute (CII).	
Experience of working with not-for-profit and governmental sector organisations	
Experience and qualifications of staff assigned to deliver this contract	
Proposals to provide services over and above the requirements	
<b>Total</b>	

6.3 LEASE will invite the top 3 tenderers to present their tenders at LEASE offices in w/c 26 July 2017. Further details on presentation times and venue will be provided nearer the time. The purpose of the presentations is to verify the contents of the tender.

6.4 The winner will be Tenderer with the highest score against the above criteria.

**7. DEADLINE**

The deadline for responses to this tender is **17:00 Friday 16 June 2017** and should be sent marked 'Private and Confidential' to:

<b>By Post</b>	<b>Or Electronically</b>
The Leasehold Advisory Service FAO Tim Courtenay Fleetbank House 2-6 Salisbury Square LONDON, EC4Y 8JX	<a href="mailto:bids@lease-advice.org">bids@lease-advice.org</a>

# Appendix

## Supplier Questionnaire - To be completed by supplier

### Background Information

Name of organisation	
Address for all correspondence	
Contact name and position	
Telephone number	
Email address	
Website address	
Address of registered office:	
Number of employees that the organisation has who can be involved with this project at a technical level.	
If the supplier is a member of a group of companies, please give the name and address of the parent company	
Provide details of the Annual Turnover (in £ Sterling)	
Latest year	
One year previous	
Please attach one copy of your organisation's audited accounts (or equivalent) and the accounts of your group (if applicable) for the last years £ Sterling together with details of any significant changes since the last year end.	