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Tender

## **Provision of Insurance and related services to Joseph Rowntree Foundation**

Joseph Rowntree Foundation

F02: Contract notice

Notice identifier: 2024/S 000-023119

Procurement identifier (OCID): ocds-h6vhtk-04845f

Published 24 July 2024, 7:05pm

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Joseph Rowntree Foundation

The Homestead, 40 Water End

York

YO30 6WP

#### **Contact**

Our Consultant for this Project is Gibbs Laidler Consulting LLP

#### **Email**

[jeremy.flint@gibbslaidler.co.uk](mailto:jeremy.flint@gibbslaidler.co.uk)

#### **Telephone**

+44 1959562242

#### **Country**

United Kingdom

**Region code**

UK - United Kingdom

**Internet address(es)**

Main address

<https://www.jrf.org.uk/>

**I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://www.delta-esourcing.com/tenders/UK-UK-York:-Insurance-services./R2GB84Q7Z8>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.delta-esourcing.com/tenders/UK-UK-York:-Insurance-services./R2GB84Q7Z8>

Tenders or requests to participate must be submitted to the above-mentioned address

**I.4) Type of the contracting authority**

Body governed by public law

**I.5) Main activity**

Housing and community amenities

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## **Section II: Object**

### **II.1) Scope of the procurement**

#### **II.1.1) Title**

Provision of Insurance and related services to Joseph Rowntree Foundation

#### **II.1.2) Main CPV code**

- 66510000 - Insurance services

#### **II.1.3) Type of contract**

Services

#### **II.1.4) Short description**

Insurance and related services for Property, legal liability and other general (non-life) insurable risks, as required by Joseph Rowntree Foundation

#### **II.1.5) Estimated total value**

Value excluding VAT: £2,000,000

#### **II.1.6) Information about lots**

This contract is divided into lots: Yes

Tenders may be submitted for maximum number of lots

6

Maximum number of lots that may be awarded to one tenderer: 5

The contracting authority reserves the right to award contracts combining the following lots or groups of lots:

Lots One to Six will be individually evaluated and multiple awards may result. Where the respondee is an insurance Broker, it may choose to place the insurance(s) required within each Lot with different insurers at its discretion, but full details of the risk carrier(s) will be required.

### **II.2) Description**

#### **II.2.1) Title**

Insurance and related services for Property, legal liability and other general (non-life) insurable risks, as required by Joseph Rowntree Foundation

Lot No

1

### **II.2.2) Additional CPV code(s)**

- 66513100 - Legal expenses insurance services
- 66513200 - Contractor's all-risk insurance services
- 66515000 - Damage or loss insurance services
- 66515100 - Fire insurance services
- 66515200 - Property insurance services
- 66515410 - Financial loss insurance services
- 66515411 - Pecuniary loss insurance services
- 66516000 - Liability insurance services
- 66516400 - General liability insurance services
- 66516500 - Professional liability insurance services
- 66517300 - Risk management insurance services
- 66518000 - Insurance brokerage and agency services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

UNITED KINGDOM

### **II.2.4) Description of the procurement**

A programme of General (non-life) insurance and related services for Joseph Rowntree Foundation. The programme will require Insurance and related services for risks that may include but not be limited to: property damage and business interruption, employers,

public, products and property owners liability, business combined/office, money, all risks, computer, contract works, Cyber, group personal accident, professional indemnity, fidelity guarantee/crime and employment practices liability. This list is to be decided at the sole discretion of Joseph Rowntree Foundation.

This Lot excludes: Motor (See Lot 2), Engineering (See Lot 3), Terrorism (See Lot 4 and 5), Directors & Officers Liability (See Lot 6).

#### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

#### **II.2.6) Estimated value**

Value excluding VAT: £2,000,000

#### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Start date

1 January 2025

End date

31 December 2027

This contract is subject to renewal

Yes

Description of renewals

Joseph Rowntree Foundation will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of insurance), subject to satisfactory service, performance and cost.

#### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 3

Maximum number: 7

Objective criteria for choosing the limited number of candidates:

This will be a two stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards for each Lot at SQ stage will be ranked according to the highest score achieved for the specific Lot and maybe rejected in reverse order to achieve our maximum number of operators for each Lot of the ITT stage. Selection Criteria for the SQ stage are summarised in this Contract Notice but will be more fully stated in the SQ documentation.

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

Joseph Rowntree Foundation will consider entering into Long Term Agreements with the bidder and/or the bidder's proposed Risk carriers for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of insurance), subject to satisfactory service, performance and cost.

#### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

#### **II.2.14) Additional information**

For more information about this opportunity, please visit the Delta eSourcing portal at:  
XXXXXXXXXX

### **II.2) Description**

#### **II.2.1) Title**

Insurance and related services for Motor vehicle risks (possibly including Motor Legal Expenses and Occasional Business Use)

Lot No

2

### **II.2.2) Additional CPV code(s)**

- 66514110 - Motor vehicle insurance services
- 66516100 - Motor vehicle liability insurance services
- 66517300 - Risk management insurance services
- 66518000 - Insurance brokerage and agency services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

UNITED KINGDOM

### **II.2.4) Description of the procurement**

Insurance and related services for motor vehicle risks (possibly including Motor legal expenses and Occasional business use extensions).

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6) Estimated value**

Value excluding VAT: £150,000

### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Start date

1 January 2025

End date

31 December 2027

This contract is subject to renewal

Yes

Description of renewals

Joseph Rowntree Foundation will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of insurance), subject to satisfactory service, performance and cost.

### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 3

Maximum number: 7

Objective criteria for choosing the limited number of candidates:

This will be a two stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards for each Lot at SQ stage will be ranked according to the highest score achieved for the specific Lot and maybe rejected in reverse order to achieve our maximum number of operators for each Lot of the ITT stage. Selection Criteria for the SQ stage are summarised in this Contract Notice but will be more fully stated in the SQ documentation.

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

Joseph Rowntree Foundation will consider entering into Long Term Agreements with the bidder and/or the bidder's proposed Risk carriers for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of

insurance), subject to satisfactory service, performance and cost.

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

### **II.2.14) Additional information**

As stated in the Tender documentation.

For more information about this opportunity, please visit the Delta eSourcing portal at:  
XXXXXXXXXXXXXX

## **II.2) Description**

### **II.2.1) Title**

Insurance and related services associated with items of Engineering plant and a programme of Engineering inspections

Lot No

3

### **II.2.2) Additional CPV code(s)**

- 66000000 - Financial and insurance services
- 66510000 - Insurance services
- 66517300 - Risk management insurance services
- 66519200 - Engineering insurance services
- 71631000 - Technical inspection services
- 71631100 - Machinery-inspection services
- 71632200 - Non-destructive testing services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

UNITED KINGDOM

#### **II.2.4) Description of the procurement**

Engineering Insurance and an associated programme of inspections for statutory and other items of engineering plant and equipment. The Contracting Authority may require that LOLER Certification is planned 5 monthly, which will allow the Authority one month to re-book appointments where access has not been gained. In addition, the Contracting Authority requires that the delivery of LOLER visits is done in line with its 'No access process', this includes evidenced appointments and records of any appointment failures.

#### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

#### **II.2.6) Estimated value**

Value excluding VAT: £50,000

#### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Start date

1 January 2025

End date

31 December 2027

This contract is subject to renewal

Yes

Description of renewals

Joseph Rowntree Foundation will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of insurance), subject to satisfactory service, performance and cost.

#### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 3

Maximum number: 7

Objective criteria for choosing the limited number of candidates:

This will be a two stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards for each Lot at SQ stage will be ranked according to the highest score achieved for the specific Lot and maybe rejected in reverse order to achieve our maximum number of operators for each Lot of the ITT stage. Selection Criteria for the SQ stage are summarised in this Contract notice but will be more fully stated in the SQ documentation.

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

Joseph Rowntree Foundation will consider entering into Long Term Agreements with the bidder and/or the bidder's proposed Risk carriers for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of insurance), subject to satisfactory service, performance and cost.

#### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

#### **II.2.14) Additional information**

For more information about this opportunity, please visit the Delta eSourcing portal at:  
XXXXXXXXXX

## **II.2) Description**

### **II.2.1) Title**

Insurance and related services associated with Terrorism Risks (Pool Re Basis) for Joseph Rowntree Foundation

Lot No

4

### **II.2.2) Additional CPV code(s)**

- 66000000 - Financial and insurance services
- 66510000 - Insurance services
- 66516000 - Liability insurance services
- 66517300 - Risk management insurance services
- 66518000 - Insurance brokerage and agency services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

UNITED KINGDOM

### **II.2.4) Description of the procurement**

Insurance and related services associated with Terrorism risks (Pool Re Basis) for Joseph Rowntree Foundation.

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6) Estimated value**

Value excluding VAT: £50,000

### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Start date

1 January 2025

End date

31 December 2027

This contract is subject to renewal

Yes

Description of renewals

Joseph Rowntree Foundation will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of insurance), subject to satisfactory service, performance and cost.

#### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 3

Maximum number: 7

Objective criteria for choosing the limited number of candidates:

This will be a two stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards for each Lot at SQ stage will be ranked according to the highest score achieved for the specific Lot and maybe rejected in reverse order to achieve our maximum number of operators for each Lot of the ITT stage. Selection Criteria for the SQ stage are summarised in this Contract notice but will be more fully stated in the SQ documentation.

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

Joseph Rowntree Foundation will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of insurance), subject to satisfactory service, performance and cost.

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

### **II.2.14) Additional information**

For more information about this opportunity, please visit the Delta eSourcing portal at:  
XXXXXXXXXXXXXX

## **II.2) Description**

### **II.2.1) Title**

Insurance and related services associated with Terrorism (Non Pool Re Basis) Risks for Joseph Rowntree Foundation

Lot No

5

### **II.2.2) Additional CPV code(s)**

- 66000000 - Financial and insurance services
- 66516000 - Liability insurance services
- 66517300 - Risk management insurance services
- 66518000 - Insurance brokerage and agency services
- 66518300 - Insurance claims adjustment services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

UNITED KINGDOM

#### **II.2.4) Description of the procurement**

Insurance and related services associated with Terrorism (Non Pool Re Basis) Risks for Joseph Rowntree Foundation.

#### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

#### **II.2.6) Estimated value**

Value excluding VAT: £50,000

#### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Start date

1 January 2025

End date

31 December 2027

This contract is subject to renewal

Yes

Description of renewals

Joseph Rowntree Foundation will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of insurance), subject to satisfactory service, performance and cost.

#### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 3

Maximum number: 7

Objective criteria for choosing the limited number of candidates:

This will be a two stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards for each Lot at SQ stage will be ranked according to the highest score achieved for the specific Lot and maybe rejected in reverse order to achieve our maximum number of operators for each Lot of the ITT stage. Selection Criteria for the SQ stage are summarised in this Contract Notice but will be more fully stated in the SQ documentation.

#### **II.2.10) Information about variants**

Variants will be accepted: No

#### **II.2.11) Information about options**

Options: Yes

Description of options

Joseph Rowntree Foundation will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of insurance), subject to satisfactory service, performance and cost.

#### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

#### **II.2.14) Additional information**

For more information about this opportunity, please visit the Delta eSourcing portal at:  
XXXXXXXXXX

### **II.2) Description**

#### **II.2.1) Title**

Insurance and related services associated with Directors and Officers' Liability

Lot No

6

### **II.2.2) Additional CPV code(s)**

- 66000000 - Financial and insurance services
- 66515410 - Financial loss insurance services
- 66516000 - Liability insurance services
- 66517300 - Risk management insurance services
- 66518000 - Insurance brokerage and agency services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

UNITED KINGDOM

### **II.2.4) Description of the procurement**

Insurance and related services associated with Directors and Officers' Liability risks for Joseph Rowntree Foundation.

### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6) Estimated value**

Value excluding VAT: £50,000

### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Start date

1 January 2025

End date

31 December 2027

This contract is subject to renewal

Yes

Description of renewals

Joseph Rowntree Foundation will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2 periods of insurance), subject to satisfactory service, performance and cost.

### **II.2.9) Information about the limits on the number of candidates to be invited**

Envisaged minimum number: 3

Maximum number: 7

Objective criteria for choosing the limited number of candidates:

This will be a two stage process, including a SQ (Selection Questionnaire) stage. Bidders failing to meet certain required minimum standards at selection (SQ) stage will be rejected. Bidders meeting the required standards for each Lot at SQ stage will be ranked according to the highest score achieved for the specific Lot and maybe rejected in reverse order to achieve our maximum number of operators for each Lot of the ITT stage. Selection Criteria for the SQ stage are summarised in this Contract notice but will be more fully stated in the SQ documentation.

### **II.2.10) Information about variants**

Variants will be accepted: No

### **II.2.11) Information about options**

Options: Yes

Description of options

Joseph Rowntree Foundation will consider entering into Long term agreements with the bidder and/or the risk carriers proposed by the bidder, for 3 years (or 3 periods of insurance), with the option to extend the award period by up to 2 further years (or 2

periods of insurance), subject to satisfactory service, performance and cost.

### **II.2.13) Information about European Union Funds**

The procurement is related to a project and/or programme financed by European Union funds: No

### **II.2.14) Additional information**

To respond to this opportunity please click here: XXXXXXXXXXXXX

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## **Section III. Legal, economic, financial and technical information**

### **III.1) Conditions for participation**

#### **III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers**

List and brief description of conditions

Potential suppliers will be required to provide an overview of relevant services provided to property owners, property developers, public sector organisations, social landlords or other similar organisations over the past 5 years, plus details of three clients currently receiving similar services. Potential suppliers will be asked to evidence permissions by the FCA, PRA or other appropriate regulatory authority indicating the types of insurance/service the bidder is authorised to arrange or provide.

#### **III.1.2) Economic and financial standing**

List and brief description of selection criteria

The tender documents will require providers to produce financial information in relation to the type of services offered, including but not limited to 3 years reports and accounts.

Minimum level(s) of standards possibly required

The financial ability to deliver the programme, including Insurers with a minimum rating of 'BBB' from standard and poor, 'B++' from A M best, or an equivalent rating by an independent and reputable credit rating agency and approved by the bidder's market security committee. In the case of any rating less than A-, the contracting authority will evaluate and accept the nominated insurer(s) at its sole discretion, subject to disclosure and acceptance prior to the ITT bid deadline of the bidder's market security committee's latest report, including written recommendation from the bidder's market security committee.

### **III.1.3) Technical and professional ability**

List and brief description of selection criteria

The tender documents will require providers to detail their relevant professional experience, resource, skills, qualifications and quality control practices.

## **III.2) Conditions related to the contract**

### **III.2.1) Information about a particular profession**

Execution of the service is reserved to a particular profession

Reference to the relevant law, regulation or administrative provision

For Insurance services, Insurers authorised under the Financial services and Markets Act 2000, Insurance Companies Act 1982 (and any other statutory modifications there of) and regulated by the Prudential regulation authority, UK Financial conduct authority, or equivalent in another member state of the European economic area. Insurance brokers registered with and regulated by the Financial conduct authority.

### **III.2.3) Information about staff responsible for the performance of the contract**

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract

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## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Competitive procedure with negotiation

Accelerated procedure

Justification:

In order to cater for the complex needs of the Insurance market at this time and to allow due time to consult with leaseholders in line with Section 20 of the Landlord and Tenant Act, we have opted to use the Accelerated procedure. The effect of the accelerated procedure is that time allowed for the Selection stage has been reduced below thirty days.

#### **IV.1.4) Information about reduction of the number of solutions or tenders during**

## **negotiation or dialogue**

Recourse to staged procedure to gradually reduce the number of solutions to be discussed or tenders to be negotiated

### **IV.1.5) Information about negotiation**

The contracting authority reserves the right to award the contract on the basis of the initial tenders without conducting negotiations

### **IV.1.8) Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: No

## **IV.2) Administrative information**

### **IV.2.2) Time limit for receipt of tenders or requests to participate**

Date

14 August 2024

Local time

5:00pm

### **IV.2.3) Estimated date of dispatch of invitations to tender or to participate to selected candidates**

23 August 2024

### **IV.2.4) Languages in which tenders or requests to participate may be submitted**

English

### **IV.2.6) Minimum time frame during which the tenderer must maintain the tender**

Tender must be valid until: 1 January 2025

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: Between 3 or 5 years from the date of this Notice

### **VI.2) Information about electronic workflows**

Electronic invoicing will be accepted

Electronic payment will be used

### **VI.3) Additional information**

The contracting authority considers that this contract may be suitable for economic operators that are small or medium enterprises (SMEs). However, any selection of tenderers will be based solely on the criteria set out for the procurement.

Bidders should note that for reasons of confidentiality, full Tender information will be made available only to those bidders that are selected to proceed to the ITT Stage. Sufficient detail is provided within this Notice, the SQ and via the Authority's e-procurement portal to enable the Bidder to decide whether or not to participate in this process.

At the ITT stage, all respondents will be required to detail your proposed insurance wordings and provide details of relevant experience of all account servicing, claims handling and risk management staff.

For more information about this opportunity, please visit the Delta eSourcing portal at:

<https://www.delta-esourcing.com/tenders/UK-UK-York:-Insurance-services./R2GB84Q7Z8>

To respond to this opportunity, please click here:

<https://www.delta-esourcing.com/respond/R2GB84Q7Z8>

GO Reference: GO-2024724-PRO-26984249

### **VI.4) Procedures for review**

#### **VI.4.1) Review body**

The High Court of England and Wales

London

Telephone

+44 1959562242

Country

United Kingdom

### **VI.4.3) Review procedure**

Precise information on deadline(s) for review procedures

The Contracting Authority will enter into this contract following a 10 calendar day standstill period starting on the day after the notification of the result. The Public Contracts Regulations 2015 provide for aggrieved parties who have been harmed or who are at risk of harm by a breach of the Regulations to bring proceedings in the High Court. Any such proceedings must be brought within the limitation period specified by the Regulations according to the remedy sought.

### **VI.4.4) Service from which information about the review procedure may be obtained**

The Cabinet Office

London

Telephone

+44 1959562242

Country

United Kingdom