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Tender

Provision of Factored Insurance and Associated Claims Handling

The Wheatley Housing Group Limited

F02: Contract notice

Notice identifier: 2023/S 000-023162

Procurement identifier (OCID): ocds-h6vhtk-03ee20

Published 9 August 2023, 8:43am

The closing date and time has been changed to:

28 September 2023, 5:00pm

See the [change notice](#).

Section I: Contracting authority

I.1) Name and addresses

The Wheatley Housing Group Limited

25 Cochrane Street

Glasgow

G1 1HL

Contact

Lynne Cumming

Email

uk.gallagherhousing.tenders@ajg.com

Telephone

+44 7801966989

Country

United Kingdom

NUTS code

UK - United Kingdom

Internet address(es)

Main address

<https://www.wheatley-group.com>

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA30353

I.2) Information about joint procurement

The contract is awarded by a central purchasing body

I.3) Communication

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

<https://www.publiccontractsscotland.gov.uk>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.publiccontractsscotland.gov.uk>

I.4) Type of the contracting authority

Other type

Housing Association

I.5) Main activity

Housing and community amenities

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Provision of Factored Insurance and Associated Claims Handling

II.1.2) Main CPV code

- 66515200 - Property insurance services

II.1.3) Type of contract

Services

II.1.4) Short description

Wheatley Housing Group (WHG) wishes to place a programme of Insurance in relation to Factored Owners and Factored Commercial Owners for building insurance. Full details are included within the tender documentation.

Wheatley Solutions Limited is the entity that is authorised to conduct insurance intermediary services therefore they are the contracting authority for this purpose.

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 66515200 - Property insurance services
- 66000000 - Financial and insurance services
- 66515000 - Damage or loss insurance services

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

II.2.4) Description of the procurement

Wheatley Solutions Ltd (WSL) wishes to place a programme in relation to Factored Owners Insurance. Arthur J. Gallagher Insurance Brokers are managing this procurement in accordance with the Public Contracts Scotland Regulations 2015 (the "Regulations")

II.2.5) Award criteria

Quality criterion - Name: Quality / Weighting: 35%

Cost criterion - Name: Cost / Weighting: 65%

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

Duration in months

36

This contract is subject to renewal

Yes

Description of renewals

24-month extension - It is WHG's intention to enter into an Agreement with a Provider for a minimum of three years with the option to extend for two years.

II.2.10) Information about variants

Variants will be accepted: No

II.2.11) Information about options

Options: No

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

Economic operations may be excluded from this competition if they are in any of the situations referred to in Regulation 58 of the Public Contracts (Scotland) Regulations 2015

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

Tenderers must confirm if they hold the particular authorisation or memberships:

Financial Conduct Authority (FCA)

It is a mandatory requirement for Tenderers to hold the above membership.

III.1.2) Economic and financial standing

List and brief description of selection criteria

Tenderers who cannot meet the required level of turnover will be excluded from this tender.

Tenderers are expected to be Standard & Poor's (or equivalent agency A M Best or Moodys) rated A- or better. If the information provided or the clarifications are not satisfactory, the tenderer will be excluded from the tender process.

Should the Tenderer not have the specified insurances at the time of tendering then, the Tenderer must certify in their response that the specified insurance will be obtained.

Minimum level(s) of standards possibly required

Tenderers are expected to be Standard & Poor's (or equivalent agency A M Best or Moody's) rated A- or better.

Tenderers must have the following insurances in place:

Employer's (Compulsory) Liability Insurance = 5million GBP in respect of any one event

Public Liability Insurance 5million GBP in respect of any one event

Professional Indemnity Insurance 5million GBP in the aggregate

III.1.3) Technical and professional ability

List and brief description of selection criteria

Tenderers are required to provide 2 examples of services carried out in the past 3 years that demonstrates they have the relevant experience to deliver the services described in the Contract Notice. The services must be of a similar value, size and scope.

Minimum level(s) of standards possibly required

Unsatisfactory experience will result in exclusion from the tender process.

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Open procedure

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

Originally published as:

Date

19 September 2023

Local time

5:00pm

Changed to:

Date

28 September 2023

Local time

5:00pm

See the [change notice](#).

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

Duration in months: 3 (from the date stated for receipt of tender)

IV.2.7) Conditions for opening of tenders

Date

20 September 2023

Local time

9:00am

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: Estimated timing for further notices to be published:

2025 if option to extend is not utilised.

VI.3) Additional information

Quality Management Procedures

The Tenderer must hold a UKAS (or equivalent) accredited independent third-party certificate of compliance in accordance with BS EN ISO 9001 (or equivalent) or a documented policy regarding quality management.

Health and Safety Procedures

The Tenderer must hold a UKAS (or equivalent) accredited independent third-party certificate of compliance in accordance with ISO 45001 (or equivalent) or have, within the last 12 months, successfully met the assessment requirements of a construction-related scheme in registered membership of the Safety Schemes in Procurement (SSIP) forum or the bidder must have a regularly reviewed and documented policy for Health and Safety management.

The Tenderer must hold a UKAS (or equivalent) accredited independent third-party certificate of compliance in accordance with BS EN ISO 14001 (or equivalent) or a documented policy regarding environmental management.

NOTE: To register your interest in this notice and obtain any additional information please visit the Public Contracts Scotland Web Site at

https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=740112.

The Contracting Authority does not intend to include a sub-contract clause as part of community benefits (as per Section 25 of the Procurement Reform (Scotland) Act 2014) in this contract for the following reason:

don't envisage being a requirement

The Contracting Authority does not intend to include any community benefit requirements

in this contract for the following reason:

To ensure premiums secured are competitive

NOTE: To register your interest in this notice and obtain any additional information please visit the Public Contracts Scotland Web Site at

https://www.publiccontractsscotland.gov.uk/Search/Search_Switch.aspx?ID=729932.

The buyer has indicated that it will accept electronic responses to this notice via the Postbox facility. A user guide is available at

https://www.publiccontractsscotland.gov.uk/sitehelp/help_guides.aspx.

Suppliers are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time to avoid any last minute problems.

(SC Ref:729932)

VI.4) Procedures for review

VI.4.1) Review body

Glasgow Sheriff Court and Justice of the Peace Court

11 Carlton Place

Glasgow

G5 9DA

Country

United Kingdom