

The CIPFA Insurance Network

Pragmatic Insurance Procurement

20th February 2014 – Glasgow

A **Special Workshop** which will update and inform insurance, legal and finance practitioners who are responsible for procuring insurance contracts. Procurement can play a valuable role in driving quality and value in public services. However EU procedures for purchasing insurance services can seem a daunting task, in what can often seem like a “seller’s market”.

Not all arrangements sit well with this method of procuring services – and the insurance market is a prime example. This event will explore the latest EU procurement regulations from legal and compliance perspective and will also focus on the challenges and practicalities of purchasing specialist services like insurance. Participants will be better prepared to achieve a balance between compliance, fairness and the best outcome for their organisation’s needs after attending this event.

09.30 – 10.00 Registration and Refreshments

10.00 – 10.05 Introductions and Overview of the Day

10.05– 11.25 Update on Public Procurement Reforms affecting Insurance Arrangements and Liability Clauses

This session will offer delegates a crucial update on recent developments in public procurement in Scotland that will have an impact on insurance contracts

- Proposed changes to Public Procurement Rules in Scotland
- Procurement challenges and Case-Law update
- Letting the insurance contract – implications
- Liability Clauses (drafting) and the legal perspective
- Impact of recent cases on contractor relationships

11.25 – 11.40 Refreshments

11.40- 12.40 The Buyer’s Perspective - Practical issues in procuring insurance services

- The buyer, the seller, the broker, the intermediary...
- Differing models and markets in specialist sectors
- Maximising your Options - Key issues in the insurance tender process
- The role of the Broker

Mark Nicolson, Head of Improvement, Risk & Insurance, LB Lambeth, CIPFA Associate

12.40 – 13.30 Lunch

**13.40 – 15.25 Facilitated Panel-led Discussion - “The Pragmatist’s Approach”
Plenary & Roundtable Insurance Practitioner Forum**

A plenary and roundtable session covering a broad range of content and discussion following on from this morning’s formal presentations. Interactive group sessions and Q&A sessions will provide the opportunity for participants to identify issues and offer examples of best practice, practitioner advice

Topics will include:

- Procurement challenges in the current insurance market
- Framework agreements, alternative risk financing vehicles (captives, pooling & mutuals)
- Financial vetting & the Pre-Qualifying Questionnaire
- Establishing effective and fair evaluation criteria
- Issues particular to business segments: case studies

Mark Nicolson, CIPFA Associate

Mohamed Hans, Procurement & Insurance Advisor, CIPFA

14.45 – 15.00 Refreshment Break

15.25 – 15.30 Summary, looking ahead & Close

Key benefits of attending

Delegates will:

- Receive updates on latest legislative developments in EU procurement procedures
- Gain a better understanding of the compliance issues and potential challenges
- Debate the specific challenges of insurance markets for public services
- Be able to discuss insurance issues specific to particular sectors e.g. local authorities, housing associations, health services and academies
- Gain practical tips on how to balance compliance with getting the best value.

Who Should Attend

This event should be of particular interest to:

Insurance managers and officers, finance officers, procurement managers, auditors and anyone else with responsibility for the specific procurement of insurance in public sector organisations.

Bookings:

These events will be limited to a maximum of 25 delegates. Given the level of demand for previous CIPFA IN events, please book early to avoid disappointment.

Further Information: www.cipfa.org/Services/Networks/Insurance-Network

Enquiries:

If you have any questions about bookings or have any questions regarding the programme, please do not hesitate to contact Mohamed Hans – **E:** mohamed.hans@cipfa.org.uk –

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CIPFA Sustainability Policy

CIPFA Business Ltd. is delivering all of our training courses, workshops and seminars in accordance with our sustainability strategy.

We do not provide hardcopy course materials to delegates and these are now distributed by email. We are striving to reduce our carbon footprint in every way that we can, and we hope that we can count on your support.

We reserve the right to alter the timing or content of sessions where circumstances require