

Partnership *working*



Bid Writing & Tendering Work-book

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ACTION PLANS

Name:	Company:
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Commitment to public sector tendering

1=High; 5=Low

TASK	Key questions	Priority
1. Are you committed to doing business with public sector? Why?	What are your objectives from the public sector?	
	Have you set any goals/targets?	
	Have they communicated to your staff?	
2. What areas are you particularly strong in?	What are your Unique Selling Points? [U.S.P.s]	
	Where do you have some competitive advantage	
	Do you need to find partners to increase this?	

Finding Opportunities

1=High; 5=Low

TASK	Key questions	Priority
3. Are you registered on the right portals	Draw a list of portals (see Useful web sites section) that appear relevant and register on them	
4. Are you getting Alerts?	Check profile on CompeteFor (and other portals)	
5. Are you dealing with your Alerts?	Do you have a process for handling them? Who looks for them? Who responds? How? Who gets feedback? etc.	
6. Which opportunities are you going to go for?	Have you a system to assess which tenders to go for?	

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Name:	Company:
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Policies; Insurances; References; Financials

TASK	Key questions	Priority
7. Do I have all 4 Policies?	Health & Safety	
	Equal Opportunities	
	Quality Management	
	Environmental	
	Any Others Policies?	
	Accreditations?	
8. Do I have enough insurance cover?	Professional Indemnity?	
	Public liability?	
	Employers Liability?	
	Any other insurances?	
9. Do I have references & written testimonials?	At least three recent ones. Relevant to the tenders you will be bidding for.	
10. Do I have verification of financial robustness?	Accounts. How many years?	
	Cash flow forecast	
	Accountant letter	
	Bank letter	

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Name:	Company:
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Pre-Qualification Questionnaire – Bid Pack

11. Do I have a Bid Pack?	Prepare a single document with ALL your information from which to “cut & paste”	
12. Does the Bid Pack do justice to the company?	Are your Unique Selling Points very clear?	
13. Can the Bid Pack be improved to increase competitive advantage?		

Bid Writing processes and expertise

14. Who will head this?		
15. What training have they had? Do they need?		
16. What is the conversion ratio to short-list?		

Closing the deal

17. Who presents?	How good are your presentations?	
18. How do you prepare?		
19. What is the conversion ration to WINS?	Is there room for improvement here? Does your presentation team need training support?	
20. What could be improved?		

Collaboration with other SMEs

21. Have you tried to work with other companies on a tender?	What worked well? Even Better If?	
22. Is this a long term opportunity for your company?	How big is the opportunity from Public Sector? What are you prepared to “invest” (time and money) What ROI are you expecting?	
23. How can you maximise the opportunities by collaborating?		

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USEFUL WEB-SITES

www.competefor.com	The main Olympics tendering site. Includes low value contracts and sub-contract opportunities from Prime contractors. Generates email alerts to warn of relevant new opportunities. Also helps you to pre-qualify for tenders.
https://etenders.london2012.com	The Olympics eTendering site for larger contracts.
www.london2012.com	General site on the progress of the Olympics. Look at the “Get Involved” section for: business opportunities; Cultural Olympiad opportunities, volunteering etc.
www.sell2wales.co.uk	This is a national portal of opportunities. FREE to subscribe nationally. Mainly higher value tenders but some useful leads.
www.businessportal.southeastiep.gov.uk	South East Business Portal. A portal where many of the local authorities in the South East are advertising their low value contracts. Worth signing up for their email Alerts. FREE.
www.businesslink.gov.uk/	Business Link website
www.ogc.gov.uk	Office of Government Commerce – the central government department responsible for Procurement Policy in the UK. A useful resource however it does require some time to become familiar with the layout.
www.tagish.co.uk/links/	A site of links to all public sector organisations.
www.direct.gov.uk	A-Z of Central and Local government. Guide on how government works
www.londonremade.com	Advice and guidance on environmental matters

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GLOSSARY OF USEFUL TERMS

Best Value	Public sector clients are using public funds and have a duty to secure best value in terms of price, quality and so forth. They are measured on the degree to which they have achieved this through External Audits.
Bona Fide	A legally binding document stating that the bid is submitted in good faith and that there has been no collusion.
Business Portal	Tender opportunities portal set up by SECE (qv). Similar to Supply2.gov (gv) Free for businesses to register and get information on tenders across the region. www.businessportal.southeastiep.gov.uk
Buying Groups	Many local authorities belong to Buying Groups to get bulk discounts. E.g. Kent Buying Consortium
CHAS	Contractors Health & Safety scheme. Created for the construction industry although sometimes used in other sectors.
Closed procedure/tender	This is when the client uses a two-stage approach: only bidders who successfully complete the PQQ (see below) are invited to tender.
Competitive dialogue	Complex and/or large new tenders may require additional preparation and the client will use this procedure to invite a small group of established providers to help finalise the specification. Only this group will then be invited to bid. Please note that this approach is rarely used.
Consortium Tendering	The Public Contracts Regulations 2006 defines a consortium as two or more organisations tendering together. In the regulations Purchasing authorities cannot exclude a tender for the sole reason that it has been submitted by a consortium.
CPV	Common Procurement Vocabulary. This is the numerical system used to identify goods and services in the tendering process.
Decline to bid	If you decide (at whatever stage) not to submit a bid it makes good sense to formally write (email is fine) confirming this fact. You may wish to give reasons (think carefully about what you say!) and express the desire to be considered for future work.
Expression of Interest (Eoi)	The formal request to bid for a contract. Increasingly this can be done electronically.
Feedback	Public sector organisations are obliged to provide feedback to unsuccessful bidders. To get the most out of this you should consider what would be useful to you and don't hesitate to follow up the feedback: the quality of information can vary! Be persistent and escalate to higher level if you are not satisfied by the feedback received. This should NOT jeopardise you from winning other contracts in the future!
Form of Tender	A legally binding document confirming acceptance of the terms and conditions of the contract
Framework Agreement	An increasingly popular tool in the public sector to create a list of potential providers. The Open or Closed Procedure is used to create the List. There is no guarantee of work nor volumes although only those on the list will be invited to provide goods/services.
Invitation to Tender (ITT)	This pack includes: Instructions to tenderers

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	<p>The specification Draft contract terms (to be read!) Form of tender (see below) Bona Fides (see below) Pricing schedule</p>
Instructions to tenderers	<p>Theoretically a document clearly outlining how the bidder (tenderer) should submit their bid. The quality of this document varies greatly and it is essential that you familiarise yourself with it and comply! Increasingly a summary Checklist of documents to be returned is provided – use it!</p>
ISO accreditation	<p>One of the tools used by the public sector to assess quality is ISO accreditation. This is often totally inappropriate for small & micro businesses. That said, a clear and written approach to quality is essential.</p>
Joint bids	<p>Smaller businesses are being encouraged to work together when submitting a bid. Careful consideration is needed around how the contract would be managed.</p>
Lead organisation	<p>In a joint bid, one provider will need to manage the contract. The client does not wish to deal with several organisations.</p>
Lots	<p>Smaller contracts are sometimes bundled together and advertised as one large contract. It may be possible to bid for one or more of these contracts (so-called Lots).</p>
Low Value	<p>Below OJEU (qv) advertising levels: typically less than €137,000 (£95,000) for Services or Supplies over the life of the contract, which could be up to 3 years.</p>
MEAT	<p>Most Economically Advantageous Tender. Price is rarely the sole evaluation criteria: quality & availability will be key considerations. (See Weighting below)</p>
Negotiated procedure/tender	<p>In exceptional cases where there is likely to be only one tenderer, the client will adopt this approach.</p>
OJEU – Official Journal of the EU	<p>OJEU is published Monday to Saturday every week (except public holidays in Brussels) containing calls to tenders that are above the EU Thresholds, in all 27 member states. These can be viewed online at Tenders Electronic Daily http://ted.europa.eu/</p>
Open Book Accounting	<p>This tool is used to encourage transparency and better partnership working between the public sector client and their suppliers. The exact model adopted may vary however it will be agreed at the outset and is likely to include the client confirming the financial resources available and the supplier confirming costs and profits. OGC guide on partnering: http://www.ogc.gov.uk/documents/cp0078_Effective_partnering.pdf</p>
Open procedure/tender	<p>Some clients will merge the PQQ and ITT stages and issue a combined document. It is essential that you consider both before submitting a bid.</p>
Provider	<p>A successful bidder or tenderer!</p>
Pre Qualification Questionnaire (PQQ)	<p>A document used to ensure that a bidder meets the minimum legal, financial, quality and environmental requirements of the client. It generally is not accompanied by specific details of the goods/services to be provided. If successfully completed the bidder will be issued with an Invitation to Tender.</p>

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Public Contracts Regulations 2006	The regulations set out the rules governing all aspects of public procurement in England and Wales.
Restricted procedure/tender	A tendering process which uses the selection stage (ie PQQ) to set up a select list or framework of providers. The list may be used for up to 8 years (though 3-5 is more normal) to invite tenders or requests to quote
Specification	A detailed summary of the client's requirements. It is essential that, as a minimum, you clearly show how you meet these requirements. You may be confident that you can offer more – which is fine – but do remember the budget is unlikely to be increased and you must ensure you are making the necessary margins for your business.
Suppliers List	Another name for a Framework Agreement. Both are usually set up for a specific period: usually 3 years. Some lists remain 'open' and organisations can apply to join.
Sustainability	Equalities, economic and environmental sustainability are key drivers for the public sector. How this is interpreted will be shown on the clients' website.
Terms & conditions	A set of draft terms and conditions (contract terms) will be issued with the ITT. It is essential that you read and accept this legally binding document. Seek clarification as necessary BEFORE you sign!
Tenderer	Another name for you: the bidder
Thresholds	The value of a contract over which it has to be advertised in OJEU (see above). They are reviewed every 2 years. The current levels for local authorities are:- Supplies of goods and services - £139,893 Works - £3,497,313
Very low value	£25,000 or less. <i>This is our working definition.</i> Typically this is the size of the FIRST project that a micro business would hope to win from the public sector to start establishing a track record.
Weighting	The importance of price, quality, etc will vary depending on the contract. The ratio being used will be included in the ITT. This should be used to prioritise the bid.

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GLOSSARY OF ACRONYMS

BAME or BME	Black, (Asian) and Minority Ethnic
BERR	Department for Business, Enterprise and Regulatory Reform.
BRTF	Better Regulation Task Force. Independent body set up in 1997. Sponsored by the Cabinet Office.
BSSP	Business Support Simplification Programme
CIPS	Chartered Institute of Purchasing and Supply
CPA	Comprehensive Performance Assessment. Being replaced by the Comprehensive Area Assessment (CAA)
DCLG	Department for Communities and Local Government
DCSF	Department of Children, Schools and Families (previously DfES)
DEFRA	Department for Environment, Food and Rural Affairs
DIUS	Department of Innovation, Universities and Skills
DTI	Department of Trade & Industry (now called BERR (qv))
IDeA	Improvement & Development Agency. Owned by the LGA (qv).
KPI	Key Performance Indicator
LGA	Local Government Association
LOCOG	The London Organising Committee of the Olympic Games
MDO	Managing Director Owner
MSE	Micro and small enterprise. Micro business employs less than 10 staff. Small business employs 11-49 staff.
NECE	North East Centre of Excellence (Procurement) www.nece.gov.uk
ODA	Olympics Development Authority www.london2012.com
ODPM	Office of the Deputy Prime Minister (Now DCLOG (qv))
OGC	Office of Government Commerce. Created OGC Buying Solutions which provides local authorities access to centralised purchasing contracts
RDA	Regional Development Agencies such as SEEDA (qv)
SBS	Small Business Service. Now renamed the "Enterprise Directorate". Part of BERR.
SEEDA	South East England Development Agency www.seeda.gov.uk
SOPO	Society of Procurement Managers