

Effective Tendering – An Introduction Workshop

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Huw Watkins – Director, BIC
Innovation Ltd

Hilary Centeleghe – Business
Development Manager, BIC
Innovation Ltd

AGENDA

- 09:15 Introduction / Welcome – Sarah Kelley
- 09:20 Overview of UWTSD tendering support & requirements – Ceri Evans
- 09:30 Intro to the 4 Training Modules
- 09:35 Key Building Blocks Training – Huw Watkins & Hilary Centeleghe, BIC

Innovation

Module 1 - Adopting the Right Tendering strategy (20 mins)

Module 2 - Finding opportunities and signing up to portals (30 mins)

Module 3 - Typical Elements & Key Points of a Tender (20 mins)

5 min comfort break (approx. 10:45)

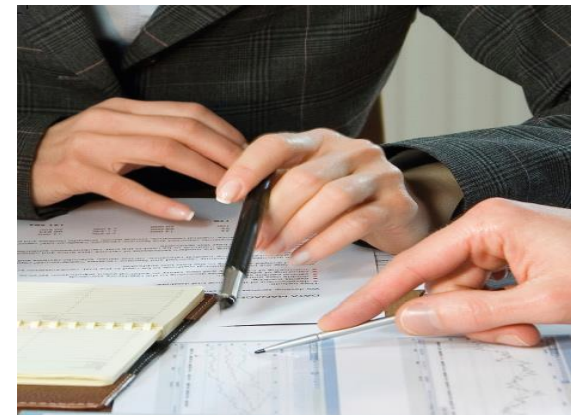
Module 4 - How to avoid tendering mistakes – practical session (60 mins)

- 11:55 Q&A and Close (finish time 12:00)

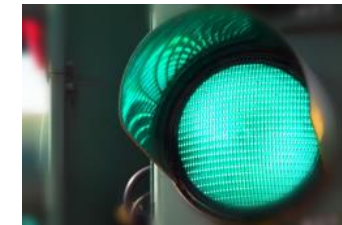
Overview of UWTSD tendering support & requirements – Ceri Evans

Introduction

- Our support – different ways we can help
- Some things we can't do for you!
- What we ask of you



Overview of UWTSD tendering support & requirements – Ceri Evans



Different ways we can support you (1)

- ✓ Bid / no bid decision
- ✓ How to structure your tender
- ✓ Advise as to what should be included within various tender sections / questions
- ✓ Review / quality assure drafts



The Devil's Advocate role!!

Overview of UWTSD tendering support & requirements – Ceri Evans

Different ways we can support you (2)

- ☑ Costing / pricing
- ☑ Corporate requirements / info:
 - Background information about the institution
 - Any questions related more generally to UWTSD
- ☑ Bid submission to tendering portals



Overview of UWTSD tendering support & requirements – Ceri Evans

Other things we can do

- ✓ Help you identify opportunities / sign-up to opportunities portals
- ✓ Go through any procurer feedback to discuss what you can do differently next time
- ✓ Help you develop your library of bidding resources (e.g. case studies of past work)
- ✓ Help you take advantage of our bid framework



Overview of UWTSD tendering support & requirements – Ceri Evans

Some things we can't do!

Write the tender for you – you are the experts in your field!!

Submit tenders that aren't fit for submission!



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David



Overview of UWTSD tendering support & requirements – Ceri Evans

What we ask of you!

- ✓ Contact us in good time and allocate enough time to complete the submission to a high standard
- ✓ Adopt an “all or nothing approach”!!!
- ✓ Get approval to proceed from your line manager / Dean
- ✓ Work as a team with colleagues
- ✓ Remember there's only one winner so don't expect to win them all!



Key Building Blocks of Tendering Training

Huw Watkins & Hilary Centeleghe - BIC Innovation

Module 1 - Adopting the Right Tendering strategy - Huw Watkins

Module 2 - Finding opportunities and signing up to tendering portals – Huw Watkins

Module 3 - Typical Elements & Key Points of a Tender – Hilary Centeleghe

Module 4 - How to avoid tendering mistakes practical interactive session - Hilary Centeleghe

Module 1 - Adopting the Right Tendering strategy

- Huw Watkins

Factors to consider when deciding what opportunities to tender for:

- Less is more
- Is the opportunity right for us, right now
- The competition
- Evaluation criteria and weightings
- Track record
- Providing a platform to bid for progressively larger contracts
- Partnering

Managing the development of your tenders:

- Library of tendering resources.
- Team approach and roles and responsibilities;
- MS teams folders;
- Ensuring bid quality (e.g. does the bid have the necessary ingredients to make it a convincing and competitive bid)

Feedback and post-tender reviews.

**Our Top Tips document will be sent following the workshop*

Module 2 - Finding opportunities and signing up to tendering portals – Huw Watkins

- Sell2Wales
- Contracts Finder
- Demonstration of Sell2Wales

Setting up accounts –
please ensure you
send the details of
accounts you've set up
to INSPIRE

- All Tenders to be submitted by the INSPIRE team and not individual departments

Module 3 - Typical Elements & Key Points of a Tender – Hilary Centeleghe

All tenders must be done in collaboration with INSPIRE

Typical tender structure

Technical Response

- Our understanding of the requirement and project context (Overview / Introduction)
- Experience and track record (often including Case Study illustration)
- Expertise (and links to Project Roles)
- Proposed approach / method statement / methodology with delivery timeline
- Project and Risk Management
- Social Value / Community Benefits

Commercial Response

- Pricing schedule / costing
- Can also be required to include a Risk Register & Timetable here

5 minute Comfort Break



Module 4

How to avoid tendering mistakes

practical interactive session

Hilary Centeleghe

Interactive Exercise - Overview

Critique a tender submission – TourCON Ltd

Session aims

1. Understand and avoid common tendering pitfalls
2. How to overcome typical challenges in public tendering
3. Awareness as to procurers' expectations and the evaluator perspective

3 groups each addressing different sections of the tender document (in 3 breakout groups)

30 minutes exercise in your group, then all return to main session and a spokesperson from each group will then present their feedback to all (5 min max each feedback)

Final feedback & critique presented (trainers)

Interactive Exercise - Groups

Group	TourCON response to review (by Q No.)	Detail of Question
A	2 & 3	Experience & Expertise
B	4	Methodology / Proposed Approach
C	5 & 6	Quality & Project Management

Interactive Exercise - Tasks

Task No	Exercise – Group A (Tender sections 2 & 3) Task Detail - Experience & Expertise
A.1	Critique TourCON's section on "Experience of Delivering Similar Contracts" – how could they have improved their response to this section? <i>*Give TourCON a score out of 10 for this section</i>
A.2	What weaknesses were evident in TourCON's section on "team expertise for delivering the service"? <i>*Give TourCON a score out of 10 for this section</i>
A.3	What else could TourCON have done to optimise their submission in this section (Experience & Expertise)?

Task No	Exercise – Group B (Tender section 4) Task Detail - Methodology / Proposed Response
B.1	What are the key weaknesses in the TourCON response for Methodology? <i>*Give TourCON a score out of 10 for this section</i>
B.2	What else could TourCON have done to optimise their submission in this section (Methodology)? What do you feel is missing?

Task No	Exercise – Group C (Tender section 5 & 6) Task Detail - Quality & Project Management
C.1	Analyse TourCON's section on "procedures and processes adopted to assure quality" to identify: a. Strengths, and. b. Weaknesses of this element of their submission. <i>*Give TourCON a score out of 10 for this section</i>
C.2	What could TourCON have done better in relation to the <u>Project Management</u> section? <i>*Give TourCON a score out of 10 for this section</i>
C.3	What else could TourCON have done overall to optimise their submission in this section (Quality & Project Management)?

TourCON Tender Submission:

Group Feedback

TourCON Tender Submission:

Final feedback & critique

Feedback & Critique - Experience & Expertise

Key Weaknesses - Experience:

- TourCON did not provide enough detail & evidence. It wasn't clear whether:
 - Examples of previous work were relevant
 - Contracts were delivered successfully
 - The client would benefit from their experience
- Problem compounded because TourCON were **assuming** TourismWales knew all about them, for example –
 - “Island Tourism Strategy”
 - “Our high profile work in this area”
 - “Tourism Advice workshops”

Feedback & Critique - Experience & Expertise

Key Weaknesses - Experience:

- Difficult for TourismWales to establish relevance of TourCON's experience:
 - No **Contract Size** information
 - No contract **Start & End Dates**
 - No detail of **where contracts were undertaken**
 - No **Client/Customer details**
 - No real detail as to **what the contracts involved**:
 - ✓ Better to have included more detail on a smaller number of contracts?
 - ✓ Most relevant contracts were @ end
 - ✓ Descriptions had not been contextualised to the TourismWales specification
- Some of the contracts were **not very relevant...copy & paste job?!!**

Feedback & Critique - Experience & Expertise

Key Weaknesses - Experience:

Difficult for TourismWales to establish whether they would benefit from TourCON's experience:

- No detail provided as to:
 - How the work was carried out/how client's problems were solved
 - How challenges & difficulties were overcome
 - Lessons Learned
 - Client Expectations
- No evidence provided as to whether the contracts were delivered successfully?!!
- Could TourismWales benefit from the experience of TourCON's partner, JourneyTourism???

Feedback & Critique - Experience & Expertise

Key Weaknesses - Expertise:

- Lack of consistency in structure of each profile
- Project Roles generally unclear
- Project Team Chart (with lines of responsibility) would have been a useful addition
- Profiles not contextualised to TourismWales specification...copy & paste job?!!
- Use of Acronyms...assuming knowledge!
- “Detailed Project Experience” – wasn’t detailed!
- Can’t say “further information available upon request”!
- Not clear which individuals are from TourCON & whom are from JourneyTourism
- No explicit mention that this expertise would be available for the TourismWales contract
- John Norman = Part-Time Lecturer!

Feedback & Critique - Experience & Expertise

Key Weaknesses - Expertise:

- Required information missing:
 - Key skills/competencies
 - Qualifications & Associated Dates
- Training & Associated Dates, CPD Details & Time in Job Position could have been included (or attach CV's as appendix)
- No summary table of key skills/competencies (& experience) cross-checked against TourismWales specification
- Additional reference to TourCON (& JourneyTourism) Staff Training & CPD Policies could also have helped

Feedback & Critique - Methodology & Proposed Approach

Key Weaknesses – Methodology & Proposed Approach

Lack of Detail & Evidence

Lack of Conviction, Professionalism & Credibility

Too many assumptions

Missing Core Methodology Content

Feedback & Critique - Methodology & Proposed Approach

Examples of lack of Detail & Evidence:

- Paragraph 1: “This needs no further explanatory comment as the methodology and purpose is relatively clear”: **SOLUTION:** TourCON should have given examples of these existing reports
- Paragraph 3: “Our preferred method of undertaking the research with business support providers would be by using focus groups”: **SOLUTION:** Provide a logical explanatory comment as to why, perhaps anchored in lessons learnt from (named) past contracts
- Paragraph 3: “We would aim to bring in an adequate sample for these focus groups”: **SOLUTION:** Define what is meant by an adequate sample!
- Paragraph 3: “Two of our experienced practitioners will carry out the Focus groups”: **SOLUTION:** Name them, summarise why they are the right people to do this work and then clearly reference across to the Expertise section.

Feedback & Critique - Methodology & Proposed Approach

Examples of lack of Detail & Evidence:

- Paragraph 3 should have included some example topics of what the focus group would cover & Paragraph 4 some examples of questions that the interviews with tourism businesses should address
- Paragraph 4 reference to databases highlights the importance of being prescriptive:

SOLUTION: State where the databases have come from; how you know they are accurate; what data they hold, etc?

- Paragraph 4: “Our pilot study will iron out any problems/issues”:

This is the first time ‘pilot study’ is mentioned – with how many businesses will this pilot be conducted with?

Feedback & Critique - Methodology & Proposed Approach

Examples of lack of conviction, professionalism & credibility:

- Paragraph 3: “We will attempt to get the views of business support agencies...”:
SOLUTION: “TourCON are in a very strong position to obtain the views of business support agencies given XYZ”!
- Paragraph 4 – Use of **slang language**: “kick-off” + “lion’s share” + “Iron out”!!
- Paragraph 5 – “Impossible to know the appropriate number of likely Case Studies that will be produced”
SOLUTION: Give a minimum (or at least expected) number!
- Paragraph 6 – “Applying our experience and knowledge to advise the client appropriately and influence critical decision making” – **too generic a comment!**

Feedback & Critique - Methodology & Proposed Approach

Examples of too many assumptions:

- Paragraph 4: “We have developed methodologies for this purpose”:
SOLUTION: Spell out what these methodologies are!
- Paragraph 4: Reference to Perge Ltd.:
This is the first time they have been mentioned – who are they?!
- Paragraph 4: “The conventional stratification of tourism businesses will be used”:
Conventional to whom?
- Paragraph 4: “Any difficulties in obtaining a high enough response rate would be addressed appropriately”
SOLUTION: TourCON should have explained what they have done in the past to mitigate this risk and provided examples of how they have remedied it, when the risk has materialised in practice

Feedback & Critique - Methodology & Proposed Approach

Examples of missing Core Methodology Content:

- TourCON should have made it clear in all cases who by job title they would aim to speak to when carrying out the interviews with the tourism businesses
- TourCON should have stated what barriers/risks they could face when carrying out the work and how these risks would be minimised/barriers would be overcome
- Details of who would take responsibility for the various tasks (and why) was missing (JourneyTourism were not mentioned at all!)

No mention of protocols/procedures to be followed in carrying out the research

No mention of equipment/tools/additional resources that would help TourCON undertake the work successfully

No mention of interim report or indicative structure for final report

Feedback & Critique - Quality & Project Management

Strengths: Quality

- Individual identified as being responsible for quality
- Inception meeting
- Pilot Studies

Feedback & Critique - Quality & Project Management

Weaknesses: Quality

- **Vague Terminology/Sentences that could lead to doubt:**

“We would probably ask John Norman to act as...”

“John Norman would train the interviewers”

“We would establish our own Steering Group...”

- **No real emphasis and lacking on quality being built-in from the beginning:**

Appropriately qualified & experienced staff

Training & CPD

Perhaps ISO9001 accreditation

Compliant with Market Research Society code of conduct

Partner company carefully selected as evidenced by...

Project Quality Plan

Feedback & Critique - Quality & Project Management

Weaknesses: Quality

- Too much generic content, e.g. “reviews of the rigour with which we carry out our research”
- Need for more prescriptive detail as to how TourCON would undertake quality control:
- TourCON could have concluded by making reference to their track record of delivering other contracts successfully

Focus Group approach, interview questions for tourism businesses & Reports will require sign-off by quality manager

A Quality log will be maintained that will check...

25% of data gathered checked for accuracy by undertaking XYZ

Any report conclusions will be backed-up with relevant stipulated evidence

Quality of the work of partners/sub-contractors will be carefully managed by undertaking XYZ

Feedback & Critique - Methodology & Proposed Approach

Improvements: Project Management

- John Lewis' background in Project Management
- Narrative that “approach will be largely based on PRINCE 2 principles” too loose & needed tightening up
- Reference should have been made as to how they would manage their partner, JourneyTourism
- Further “key details” of proposed project management approach should not be included in an Appendix!
- Examples should have been provided as to what the Checklists would be used for
- Remove the reference to employing 2 NEETs from here and place in relevant section
- A number of additional elements could also have been referenced:

Need for significant up-front communication & regular subsequent communication

Monthly Highlight reports forming basis of monthly progress meetings

Project Timeline/GANTT Chart & Specific Milestones, as well as resource implications and inter-dependencies for stages

Set-up and Maintenance of Project Risk Log to be shared with TourismWales

Some other features TourCON could have included to optimise their submission (not exhaustive):

- Inclusion of Contents Page
- Inclusion of Executive Summary
- Highlighted key points/use of more sub-titles/tables & diagrams
- Devoted their effort in accordance with the Evaluation Criteria weightings
- Complied with the Procurer's Instructions!

Conclusions

- TourismWales would:

Not have awarded this contract to TourCON

Have probably concluded from TourCON's responses that this contract was not particularly attractive to them

- TourCON could have probably have won this tender if their approach to tendering had been different!
- Remember that tendering is -

a real opportunity to present a convincing Business Case

your chance to provide evaluators with the information and evidence they need to make the decision to work with you!

Any Questions ?



+44 (0) 1248 671 101



info@bic-innovation.com



www.bicinnovation.com