

TOP TENDERING TIPS – BIC Innovation Ltd

Does your tender meet the needs of the Funder?

ie Value for Money; innovation; added value; meets the clients priorities and view of the contract; social value / Well-being of Future Generations Act etc

When you first get the ITT (Invitation to Tender)

1. Where has the tender come from? Is it through your own alerts on a contracts finder portal? If so, you must immediately inform INSPIRE
2. Do not put it to one side as the “*deadline is a month away*” - Tender responses always take longer that you think, so make sure you review it straight away and plan the timescales!
3. Read the full Invitation to Tender (ITT) document and any other documents within the Tender pack
4. Read it again
5. Highlight any key points or items of note (you can then use these to check your response has addressed each of these)
6. Complete the Tender Evaluation Plan (TEP) - either small or large version of the Tender Evaluation Plan – NB we’ve included an example of both but feel free to tailor, and discuss with any other relevant/key internal team members – *Please note this will be superseded by the UWTSD Portal being created by INSPIRE*
7. Make a decision on whether you are going to respond with a bid & update the TEP
8. Remember creating a tender response is a team effort! Who will be involved in this bid? And then make sure you collaborate with INSPIRE
9. Go back to the ITT and review how you are going to respond – this is good planning and will help you construct a good response – key top tips here are
 - Is it free form or online form response!
 - Does it have specific sections outlined to structure your response (this helps if there is, but often in free form there is little direction)
 - If online – please be aware sometimes tables etc will not insert properly
 - Take note of any word count or font instructions & do not deviate from this
 - If there is a word count you need to carefully plan your response as to what you want to say (2 potential problems – tight word count means you have to

be very factual and precis, but context can be lost if not explained adequately; large word counts eg 5000 per question can seem huge but invariably these are on large bids so you will need them, but there is the need to be structured and not overload the text)

10. What are the deadlines? Here's some key tips re deadlines

- Never plan to submit on the deadline date! The latest you should plan to submit is the day before! Why? – because a problem/issue will always present itself when submitting, no matter how well you plan
- Make you give yourselves other deadlines (1st draft, 2nd draft, review, proofread, final check etc)

11. With your team/individuals involved in the bid, discuss what you feel should be included –

- Examine each question in the ITT (if there are specific responses requested) and discuss what the key aspects of your service need to be included
- If it's an open freeform response, discuss your sections highlighted from point 6 as to what the key aspects of your service need to be included
- If you need to create a programme or piece of work specifically for the bid, what does this consist of, what USP's can you bring, what will make your bid special?
- If it's a multi-team response, who is doing what (add to TEP) – make sure you include deadlines

12. Do you have any questions for the funder? If so, submit these to the portal Q&A or by the given email asap. Make sure your question – makes sense, is worded positively, asks for precise feedback (may be a mix of open and closed questions)

13. Go onto the submission part of the portal and check out exactly how the response is set out and any particular questions or requests for certificates etc. This will help our bid preparation but also save time and stress at submission time

14. If the funder is requesting a document only response, make sure you have all appendices (certificates, CV's etc) saved as an appropriately named pdf and attach to your email (can also send all docs together in a zip file)

Constructing the tender response

1. Try to agree a house style if there is more than 1 bid writer
2. Get all policies and certificates required copied into your bid submission folder for easy access and uploading

3. Bid Writing – although you’re likely to have a word count restriction, still make sure that –

- there is no ambiguity
- clear plain English/Welsh is used
- acronyms are ok but only after the full term is used and the acronym in brackets, this must be repeated on each separate response document or online question, ideally like so
Eg Welsh Government (WG), University of Wales Trinity St David (UWTSD) etc
- ideally your proof-reader/checker should not be someone who’s written the bid
- if you can, break up from being text heavy, with tables, charts etc but be warned these often do not transpose into online applications well and are much better if submitting as a document/pdf. Also do not use these unless they add to your response (and remember tables, pictures, charts etc need to be accounted for in your overall word count)
- check against your inclusion list that you’ve answered everything requested
- do not add in unnecessarily to bump up the word count
- Do the “Teenager Check” or the “Child check” – this is a fool proof way to ensure your bid is explained and to the point
“Teenager Check” – at each stage or point ask “So?”? (or “So What?”)
The “Child Check” can also be applied – “Why?”
Both are straight talking and want the information fully and justified!
- if you can submit by document, always ensure it’s the pdf version as this looks neater

4. Top tips for the Technical Response!

- Make sure the Proposed approach / method statement / methodology / delivery plan section focuses on what you are going to do (whilst its useful to back this up with previous experience, keep that to a minimum, particularly if you have a tight word limit)
- Sometimes staff management is key, particularly in relation to deadlines – here a Gantt chart / Timetable is always useful. But be prepared to do a written summary if it’s in the ITT. This may be a key aspect particularly if you are using outside resources or are proposing a collaborative bid with other organisations
- It’s always useful to have a standard organisational Social Value / Community Benefits overview/outline document, this can be pre-prepared and then adapted by department/applicator – when you’re responding to this consider all aspects both from an organisational point of view but more importantly what will your project contribute from a social values and community benefit point of view
- Ensure you have addressed every point in the funders ITT

5. Before submitting, check –

- Do a final document read through
- Is everything named clearly, appropriately, and consistently? Make it easy for the funder to know who the tender response is from, to which part of the ITT it responds to and what the response is!
e.g. 1 – **Q 1.2 Skills & Experience Name of project – Your Organisation name**
e.g. 2 – **Commercial Response Project Name - Your Organisation name**
- That you have included everything requested in the ITT – Commercial Response, Technical Response questions, requests for CV's or pen profiles, certificates & policies, Timetable Gantt chart etc

After you've submitted your proposal

1. Relax and take a breather as the submission process can be quite stressful
2. Remember to add all the information to your bid library to make your next bid response that little bit easier (hopefully)
 - Create a bid library index (either on your CRM if it can do this or a simple spreadsheet will do fine)
 - In your Index you'll want to record the date you submitted, the name of the project, the funder, the contract award date, the project value, the project duration, the project delivery duration, any mobilisation period, a link to your bid folder & documents and any notes
 - It's always good to have a way of identifying won/lost bids – either colour coded and/or a won/lost column
 - The link from your bid library to each individual bid folder is particularly key as you won't always be able to easily find a bid from a year ago for instance
 - If there are any key documents that you think you'll likely use again, it's prudent to store in a folder in your bid library for easy access – again make sure you create an index for these with a full explanation of what's in the document and why you think it's a useful bid item (saves you having to search and open lots of documents)

Once you've heard the bid outcome

1. Congratulations if you've won – now book a project team kick off meeting asap. You may be in a 10-day standstill but there's lots you can be doing in preparation internally during this period



2. If it's not to be this time, don't despair – use the feedback to learn and grow