

ESF Co-financed Tender writing Workshop

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Renaissance London Gatwick Hotel

Welcome

Tender writing



Leading learning and skills

01

Workshop purpose



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- To improve the quality of tenders being developed in the South East region

Workshop coverage



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- The OCT context
- Understanding the selection stages
- Maximising your project
- Key pitfalls

OCT tenders rather than bids



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BID

A proposal aimed at securing funding for a project idea within a broad ESF category

TENDER

A response to a detailed specification defining tightly the need, desired activity and required outputs and outcomes

Key selection stages



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Eligibility



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- Did the tender arrive before the deadline?
- Was the proposal submitted anonymously?
- Are they a legally constituted organisation?
- Is the proposal complete (every question answered)?
- Are requested documents included (partnership declarations, audited accounts, health and safety forms)?
- Is the proposal signed (original) and dated?
- Is the proposal an original plus required number of copies?

Assessment



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- To establish whether or not the applicant has responded to the specification and eliminate speculative bids. Also to establish whether there is sufficient relevant information provided to enable fair and objective comparison at appraisal

Assessment panel

– key issues



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- Not delivering all specified outcomes
- Inconsistency between text and summaries/delivery plan
- Too brief (not enough info) or too wordy (too much padding)
- Information not relevant to specification Do the costs match the described activity?
- Alternative/additional outcomes – are all min requirements met first?
- Are the beneficiaries eligible/meet minimum requirements?
- State Aid – are employer contributions included and correctly calculated?

State Aid



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- Treatment of State Aid will be stated as part of the specification – two types...
- **De Minimis** – requires calculation of the amount of public funded support a beneficiary company has received over a rolling 3 year period (comes with paperwork and a long list!)
- **Training Block Exemption** – requires a percentage contribution (in cash) from the employer towards the **training costs element** of the budget. Percentage specified, probably about 30%

Assessment – killer ratings



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- Fit to specification – project objectives
- Fit to specification – target group
- Fit to specification – budget
- Management (especially partnership management)
- Delivery plan (who's doing what? Recruitment vs achievement)

Appraisal stage



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Appraisal



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- To select the project(s) that will be taken forward to post tender negotiation (PTN) and that will enable best delivery of the tender specification.

Appraisal/selection - key minefields



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- **Fit to specification** (including beneficiaries & delivery plan)
- **Delivery arrangements/management** (incl partners)
- Sustainability/sustainable development
- Track record (relevance and breadth)
- Equality of access (proactive)
- Quality of provision (relevance, partners & breadth)
- Health & safety (proactive approach)
- **Value for money** (relevance, detail, proportion of funding reaching the learners, State Aid, match to delivery plan/spec)

Delivery plan



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- Allow for lead-in time
- Allow for reasonable drop out rate (starts vs achievement and be aware of which the specification requires)
- Who is delivering what (make sure this matches the text in delivery arrangements)
- Realistic timescales –do you need all the allocated time?
- Evidence –how will you prove the activities have taken place
- Keep it manageable – not hundreds of outcomes

Budgets



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- All costs must be attributable to the specification (are we paying for what we want)
- Genuine, additional costs only
- Costs proportional to outcomes (where more than one project requested)
- Categorise costs – management/training, beneficiary, other and other training
- Eligibility – premises, capital, release/secondment time
- Use of match funding and clarity of costs
- Employer contributions

Good budgets...



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- Reflect good projects: *well planned*
- No obvious omissions
- Nothing over the top
- Value for money: maximum focus on project activity and impact
- Project expenditure itemised and clear
- Figures add up
- Figures add up ***correctly*** and match the text!

And remember...



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- Once the contract price is agreed, you get paid **on outputs**, ie
- If you deliver what you contract to deliver, you get paid
- *But if you don't, you don't!*
- Beware over-estimating – you may price yourself too high
- Be careful of under-estimating – there may be doubt on your ability to deliver at this rate

More tips & feedback



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Equal Opportunities



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- Mainstreaming of Equality & Diversity
- NOT bolt-on/tokenism
 - Strategic commitment
 - Relevant to the project
 - Integrated
 - Actively developed
 - Monitored and corrected
- Active recruitment and meeting the needs of people from BME communities and with disabilities, not just where required by the specification

Target groups



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- Describe the target group
 - In demographic terms
 - As a proportion of the local population
 - In terms of the barriers they face
 - Their learning needs
- **Show** that your organisation/partnership can provide sustainable support
- **Show** that you know how to reach, recruit and retain the target group

Partnership

– some basics



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- Make sure you know why you need to work with others
- Identify the right partners and agree roles
- Partners must know why they are there and what the added value is
- Partners must be moving in (roughly!) the same direction
- BUILD strong partnership working – don't leave it to chance
- Get partners involved at an early stage
- No surprises
- Share the glory, accept the blame
- Be clear on partnership management

Get the fundamentals right

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- Read ALL the guidance
 - www.lsc.gov.uk/hampshire-iow
- Read the proposal form
- *Again*
- *and*
- *Again*
- Say how you will deliver what the specification asks for, not what you want to deliver

Good tenders are...



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- Clear
- Straightforward to read (and well laid out)
- Convincing
 - How the project will work
 - Why it will be successful
- Complete
- Competitive
- Interesting
- Provide what is asked for - directly

Re-cap on common mistakes



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- Bidding for what's not there or tinkering with a specification
- Not responding to the specification or offering something different
- Not answering the question (at all/parts/a different question)
- Leaving blanks or not using paragraphs
- Incomplete or unclear information or statements, or too much padding/irrelevant information
- Budgets that don't add up (or don't deliver the specification)
- Writing, not typing (or typing the wrong size), or exceeding the limit
- Missing the deadline for submission

Tools



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- Tender writing handbook
- Guidance notes
- Tender proposal form
- **THE SPECIFICATION**

Any questions?



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