Using the SFA's tendering portal & ESF
bid writing tips

17 December 2015

LSECT
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Inclusion

NIACE The National Voice
for Lifelong Learning

Welcome to this Lsect webinar
More than 700 registrations for this webinar

Agenda

13:00 Registration

13:05 Introduction from Nick Linford

13:10 The ESF tender application process
Susan Collins, Head of Procurement Services at the Skills Funding Agency

13:50 How to improve your chances of tender writing success
Mike Cox, Operations Director, AELP

14:30 Q&A

14:45 End

Lsect is working in partnership with NIACE and Inclusion to deliver a range of support materials, webinars and events
for colleges and training providers interested in tendering for ESF funded provision. Register here to be sure to receive
further information and please share this web page with colleagues.

Sign up for email updates about resources and training here: http://lsect.co.uk/events/esf-funding-membership/

Introduction

Of the planned 170 ESF 2014 – 2020 tenders, so far 9 have been published

Area	Contracts	Amount	Deadline
Cornwall and Isles of Scilly	One	£1.1m	25/01/2016
Greater Manchester	One	£12m	25/01/2016
Swindon and Wiltshire	One	£1.35m	25/01/2016
West of England	One	£1.7m	25/01/2016
Leeds City Region Enterprise Partnership	Six (one for each area)	£4m	18/01/2016
Leicester and Leicestershire Enterprise Partnership	One	£2.4m	18/01/2016
Leicester and Leicestershire Enterprise Partnership (for ex-offenders)	One	£900k	18/01/2016
Northamptonshire Enterprise Partnership	One	£300k	18/01/2016
Solent Local Enterprise Partnership	One	£693k	18/01/2016

Wave 1 links http://feweek.co.uk/2015/12/07/esf-launch/

Wave 2 links http://feweek.co.uk/2015/12/14/second-wave-of-invitations-to-tender-published-for-delayed-esf-contracts/

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Susan Collins

Head of Procurement Services

Overview

- **Public Contract Regulations 2015: Transparency and equal treatment**

- **The Register of Training Organisations**

- **Candidate requirements**

- **Tender evaluation**

- **Award of Contract**

- **Next Steps**

Public Contracts Regulations

Public Contracts Regulations 2015 introduced in February 2015.

All procurement must be carried out with the key principles of transparency and equal treatment of economic operators.

All information about the procurement must be published up front.

Ensure that no potential candidate has an unfair advantage over another.

The Register of Training Organisations

Register application-pass: what this means.

2 elements:

- **Due Diligence**
- **Capacity and Capability**

LEP delivery areas.

Publication of the Register.

What candidates are expected to do

- **Read the 'Attention Read Me First document' FIRST.**
- **Ensure you submit a compliant bid.**
- **Review the online questions and downloadable questions.**
- **We recommend you do not leave submitting your response to the last minute**
- **If you have the slightest concern, use the message board and ask us, if it is a technical problem in the first instance access the online help documents or email the helpdesk at helpdesk@bravosolution.co.uk**

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What makes a compliant bid?

Meets the requirements in the Read me First.

The following uploaded:
- **Completed questionnaire template.**
- **Deliverables toolkit**
- **Subcontracting declaration.**

All need to be uploaded in the correct space in Bravo within the Technical Envelope.

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What candidates must not do

- **Canvas help, assistance or opinion on the Invitation to Tender (ITT) or the procurement process in general from any Skills Funding Agency employee, XX LEP, other Government Departments, Agency or NDPB other than through the e-Tendering portal message board.**

- **At the end of the timeline submit a partially completed ITT as this will not be evaluated.**

- **Submit a response after the closing date and time.**

- **Any ITT submitted after the deadline will not be considered.**

Do's and Don'ts

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- **Make sure you understand the Register**
- **Answer the question in the relevant space**
- **Don't cross reference**
- **Read all the information**
- **Use the message board facility**
- **Use all the available character space**
- **Check and recheck your submission**
- **Make assumptions we "know you"**
- **If you use a bid writer ensure they understand the ethos of your organisation and you submit the bid not them.**
- **Do substantiate statements with examples**

How tenders will be evaluated

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- **All questions will be evaluated by appropriately experienced and skilled SFA and Local Enterprise Partnership employees.**
- **All evaluation will be subject to moderation.**
- **We will moderate nationally to ensure consistency, please ensure your tender response is tailored to the area in the ITT.**
- **The basis on which a contract will be awarded.**
- **Candidates should note that there is no separate appeals process**.

How candidates will be advised of the outcome

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- **Successful candidates will receive an Award Decision Notice advising them the SFA intends to award a contract for the delivery of the service in xx area for which they have submitted a tender and has been successfully evaluated.**

- **Unsuccessful candidates will receive an Award Decision Notice advising them of all relevant information required under the Public Contracts Regulations 2015.**

- **These letters will be sent via the BRAVO e-Tendering portal message board as an attachment to a message against the relevant ITT number.**

Useful Links

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SFA Funding Rules:

https://www.gov.uk/government/collections/sfa-funding-rates

Information about the Register:

https://www.gov.uk/government/collections/sfa-register-of-training-organisations

e-tendering portal

https://skillsfundingagency.bravosolution.co.uk/web/login.shtml

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Questions?

www.skillsfundingagency.bis.gov.uk

aelp
association of employment
and learning providers

How to improve your chances of success when responding to invitations to tender

Mike Cox, AELP
@mikecoxone
mcox@aelp.org.uk

What we will cover

- Simple things that you can do to help prepare for tenders as and when they appear
- Processes that will help you plan what to put into and what to leave out of a tender
- Systems for reviewing content against a specification to maximise your chance of success

Before you start

- Generic text
  – Policies, accounts, pen portrait, track record
- Regular updates - evidence
  – Who is doing them?
  – Monitoring policy
  – Skills strategies
- Partnership planning
  – Complementary skills
  – Regional coverage
  – Additional capacity

To bid or not to bid

- Money Money Money
- Risk of failure
- Risk of success
- Decision Tree
- Time is of the essence

To bid or not to bid

| Essential Points |
| --- |
| Have we been tracking this opportunity prior to publication? |
| Do we have regular meetings with the potential client? |
| Is there a positioning / strategic reason to pursue this? |
| **Communicate** |
| Is this one of our sectors/accounts? |
| Are we currently engaged? |
| If we contact the client will we be known to them? |
| Have we spoken to the client about the opportunity? |
| Do we know the buyer? |
| **Research and Prepare** |
| Do we understand why the requirement has arisen? |
| Do we have a differentiated win theme which will align with the clients thinking? |
| Do we consider ourselves as the incumbent? |
| Do we know how many other companies are bidding? |
| **Internal** |
| Do we think we can complete the bid on time with the resources available? |
| **Commercials** |
| Do we know the client's budget for this piece of work? |
| Do we know the standard rates that the client would be comfortable with? |

Systems

Stick to the system

- Whole organisation approach
- Who decides what?
- 3 stages – Plan, Write, Review
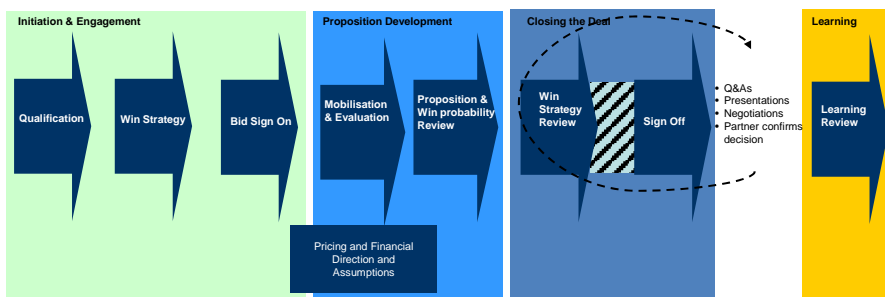
Planning - Whole Organisation Approach

- Who is delivering what and to whom?
- Outcomes and outputs - numbers
- Impact
- Real costs – including partners
- Time to write – who?
- Time to review – who?
- Sign off – text and budget – who?

Planning - content

- Time table – put it in their diary
- **Learner journey** – everyone understands
- Writing for marks
- Cut out the waffle
- The deadline rules

Writing

- What do the funders want to see?
- What will get you the most marks?
- Link everything to the impact
- Have evidence to support your plans
- Be specific
- Appropriate use of innovation
- Add value
- Don't waffle! Word limits

Review

- Most important part!
- Build in time to review
- Build in time to improve – plan for rewrites
- Unforgivable random spelling – trained in editing and proofreading?
- Sort out the layout
  - Diagrams matching text – adding value
  - Consistent style
  - Page numbers

Review

- Review to check understanding by someone not involved
- Review against the scoring matrix
- Review against budget
- Review against outcomes, outputs and numbers
- Review against original plan
- Sign off?

Review

- Ask for feedback – even if successful
- Review process – what worked, what didn't
- Review the skills of staff involved

Roles and Responsibilities

- Who is in charge? – Bid manager
- Who looks for opportunities and how?
- Who signs off what and when?
  – Budget
  – Text
  – Partnerships
  – Contract

Summary

- Prepare all the time
- Plan, write, review
- Review

Q&A

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