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RESOURCING

Tendering Policy



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Tendering Policy



1. Purpose and scope

This policy governs the way we bid for new work opportunities. The policy applies to all employees responsible for submitting tenders for new work.

2. Policy objectives

- The way we manage our tendering makes a huge difference to our profitability, our reputation and our success.
- Tender opportunities need to be carefully assessed and match our ability to deliver.
- It is a waste of time tendering for contracts that we are not going to win.
- The most common reason for lack of success is poor choice of tender opportunity.

The objectives of this policy are to:

- Ensure the Bid / No Bid decision is a carefully considered process balancing the opportunity, against a realistic evaluation of the likelihood of success
- Our approach should be systematic, incorporating a scoring matrix or key bid / no bid questions which will help evaluate the decision and remove any emotion that may be associated with the opportunity
- Use of the Key bid / no bid form is mandatory for all tenders over £25k

Bid / No Bid Questions

- What are the mandatory requirements (for example financial stability, quality accreditations) and can we meet them?
- Can we show relevant experience?
- Have we done this type of work before?
- Do we need to partner?
- Who is the competition?
- Is the contract the right size for the business?
- Will this clash with any existing or upcoming work?
- What is the profit potential?
- What impact will there be on the business cashflow?
- Do we have sufficient resource to respond professionally within the deadline?

3. Preparing a Bid Plan

A successful bid team should include a mixture of individuals who can bring different perspectives and expertise to the formulation of the best solution and proposal documentation. There are a number of key roles within a successful bid team which create the blend and expertise required for a successful proposal. An individual may fulfil one or multiple roles.

Bid team roles:

Bid Manager – someone who is going to manage the tender. The individual should have the expertise to manage the entire process and have authority to make key decisions.

Technical Experts – the best technical people should be involved in the design and presentation of the solution, particularly those who can bring expertise as well as new ideas.

The Writers – those who are skilled at presenting clear technical and sales documentation. A number of writers may be involved, each of which should know which pieces they are responsible for and when they need to have completed the work. When each has completed their area of responsibility, their draft document should be sent to a central administrator to be added to the main proposal for review.

Contributors – these may be internal or external specialist contributors who can supply additional specialist information and knowledge to the proposal, in areas such as quality, financials etc.

Administrators – responsible for formatting and collating of the proposal documentation.

Proofreader – usually best if a single person takes this role to ensure continuity. The proofreader should be responsible for checking the tone, flow and formatting of the overall proposal and for ensuring that key themes and business strengths are included throughout the documentation. The proofreader ideally should not have a detailed technical knowledge of the solution, so that they can read the document as if an 'outsider' was reading it, ensuring that technical content is easily understood.

Fault Finder – someone who can pessimistically judge the bid and find areas of improvement.

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4. Bid Start Meeting

Holding a bid kick-off meeting is an important initial step in the bid planning process to ensure the best bid is presented, and that the proposal is consistent and most importantly prepared on time.

Before the meeting, all relevant tender documents should be distributed to the team by the Bid Manager who should indicate which key documents each member should specifically read. The Bid Manager and at least one other nominated member of the bid team should read all the ITT documentation, including the contract.

The purpose of the bid team meeting is to:

- Brainstorm the solution and approach, the delivery team and evidence that can be provided of previous experience and expertise
- Identify all the documents and information likely to be needed when writing the proposal
- Allocate different roles and responsibilities to each member of the proposal team and identify who will be responsible for contributing to each part of the document
- Create a proposal schedule including deliverables and milestones
- Review, expand on, and brainstorm the key questions and assessment criteria used during the bid/no bid stage to formulate a number of winning bid strategies.

The team should imagine themselves as the Buyer during this process and identify all the issues and requirements in order of importance, brainstorm all the ways that the business can offer a solution and then compare these to what your competitors can provide. Can we offer greater quality, reliability, efficiency, cost-effectiveness?

Make sure we:

- Document all the strategy points for inclusion in the Bid Plan document
- Find out if there are questions about the proposal

that can only be answered by the Buyer, agree who will be the key contact and how they will manage this and communicate the answers to the team

- Review the business's 'Why Us?' statements and update with relevant tender detail

Keep it Simple, & Professional

- Address exactly what the Buyer asks for, and ONLY what the Buyer asks for
- Use a consistent writing style
- Be professional in the format and presentation of the response

Review & sign Off

It is vital to review our proposal at regular intervals during its preparation for content, sense, readability and flow.

The nominated proofreader should be someone who has not been directly involved in the tender preparation and can review it as if they were the Buyer.

Allow enough time in the tender timetable for review points and follow-on actions to be incorporated.

The Director should sign off the tender and should be regularly informed of progress, the costs estimates and any identified risks.

S. Smith

Director

September 2024