

The Good Bidding Guide

A guide to bidding for investment from
the Careers & Enterprise Company

The information contained in this guide aims to provide guidance on successful bidding and is not exhaustive. Following the guide does not guarantee funding from the Careers and Enterprise Company. The paper is designed to be used in conjunction with the Characteristics of Effective Programmes Guide.

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Contents

- 1. Introduction**
- 2. About the guide**
- 3. Planning for success**
- 4. Principles of good bid writing**
- 5. Presentations and interviews**
- 6. Bidding as a small organisation**
- 7. Post-decision planning**
- 8. What are we looking for**

Glossary

1. Introduction

The Careers & Enterprise Company is an employer-led organisation that aims to inspire and prepare young people for the fast-changing world of work. We work in partnership with schools, colleges, employers, youth organisations and others involved in careers and enterprise to create opportunity for young people.

We use our investment to provide initial funding for programmes that help deliver our ambition to deliver well-evidenced careers and enterprise support for young people. To date, we have allocated £13.7M through our Careers and Enterprise and Mentoring Funds with match funding of £11M from approved bids.

There is a high level of competition for our investment: approximately 1 in 5 bids made to our Funds is successful and for our recent Investment Fund of £4M we received applications totalling £40M. We recognise that bidding for investment takes significant time and resource and are keen to support potential bidders to focus their efforts. We want to target our investment at the highest quality programmes that will truly make a difference to the opportunities and outcomes for young people. We also want to use our investment to lever other funding into careers and enterprise provision. We have therefore produced this guide to bidding, and a sister guide on Characteristics of Effective Programmes, to help individuals and organisations who wish to work with us to do so effectively and efficiently.

We hope that you find the guide helpful. Please do visit our website to find other information and resources about our work, research and news of developments in the careers and enterprise sector.

Thomas Graham, Chief Investment and Strategy Officer

2. About the guide

This guide aims to help organisations to produce successful bids and tenders. Whilst it focuses on investment from the Careers & Enterprise Company it is designed to be useful to organisations seeking to win funding and contracts from other sources. Every funding body and bidding organisation is different so the guide is designed to provide general hints and tips rather than a prescriptive set of rules. We hope that it is useful for experienced bidders as well as those new to competitive bidding.

The guide is based on: analysis of the applications submitted for investment to the Careers and Enterprise Company; consultation feedback from the Company's investment team and Lead Assessors; the extensive bidding experience of the Guide's authors; and feedback gathered from a grant recipient workshop.

The guide is structured around five key areas:

Section 3: Planning for success

Section 4: Principles of good bid writing

Section 5: Presentations and interviews

Section 6: Post-decision planning

Section 7: What the Careers and Enterprise Company is looking for

A number of examples are used in the guide for illustrative purposes. These are drawn from a range of real bids but are anonymised appropriately.

3. Planning for success

'Bid or no bid'

Bidding for funding is resource intensive: it takes time, expertise and skills. It is also increasingly competitive so it is vitally important that you have a *strategic* approach to your bidding. This means that there must be a close **strategic fit** between what the funder wants to invest in and your organisation and proposed programme.

Avoid the temptation to try to 'shoehorn' what you want or would like to do into the funding opportunity and don't fall into the trap of 'chasing the money' even if you are under pressure to secure replacement or additional resource. Funders and commissioners can usually spot very easily when this is being done and you will have wasted a lot of time and effort in pursuing the wrong opportunity. To stand a chance of success with your bid, your organisation and proposed activity must align with the aims, priorities and eligibility criteria of the funding body and investment programme. **If this strategic fit is not present and/or you cannot meet all the stated eligibility criteria, don't bid!**

To help with this, make sure you:

- Have a detailed understanding of the funding body: What are their objectives and priorities? What is the difference they want to make? It can also be useful to research the organisations and activities they have previously funded
- Have read and fully understood all the documentation provided by the funding body for the proposed investment including **guidance, application forms, eligibility and appraisal criteria, funding rules and timescales**. If you are unsure on any of this don't be afraid to ask – most funders operate a process for potential bidders to raise clarification questions. You should use this to plug any gaps in your understanding and learn from other queries being raised
- Are clear about the resource implications for your organisation of making a bid and are confident you can produce a high quality bid in the time available
- Have a clear internal process for 'bid/no bid' decisions including who decides, on what basis and when.

If you decide, at this stage, to make a bid you should keep the **'no bid' option** open as you work through the detail of your proposed programme.

Don't start bid writing ...yet

Even if time is tight resist the urge to start completing application forms or drafting bid content. A well-written bid will not make up for a poorly developed proposition that does not fully meet the funder's requirements. Try to take a step back from the application form/s and focus on what you need to do as an organisation to develop a strong proposition.

To help with this, you should have a **bid plan** that identifies:

- What you need to do to develop your proposition, get from first draft bid to final version and submission by the deadline
- Who needs to input or be consulted e.g. operational, finance and managerial staff and external partners/stakeholders: who will do what and by when
- Lead responsibility for the bid plan i.e. who is project managing the process to ensure all actions are delivered in the agreed timescales?
- Clear accountabilities for compliance and quality checks on the bid and who gives final approval or 'signs off' the bid for submission.

You should also at this stage **focus on your proposition**. Try to produce a brief outline that defines and describes your proposed programme against the following:

- Why? What is the rationale? Highlight the strategic fit
- What? The objectives, activities and outcomes
- Who with? The beneficiaries, main partners and stakeholders
- How? The delivery and management arrangements
- Where? The target areas/delivery locations
- When? The timescale for planning, development and delivery
- At what cost? The set up, management and delivery costs, sources of funding flagging up any issues on value for money, viability and sustainability
- Impact? The difference it will make and how this will be evidenced.

Once you have produced this, check it against the eligibility criteria, priorities and finance of the investment opportunity. If you find there is a mismatch you need to consider whether you make a no-bid decision or modify your proposition so that it fits. If you are faced with having to fundamentally change your proposition to make it fit, you need to carefully consider whether this is the right funding opportunity for you to pursue. Don't apply if the bid risks skewing what you 'are about' as an organisation or necessitates a significant deviation from your core work.

This outline can also be used as the basis to develop a logic chain or theory of change for your proposition. These are sometimes requested by funding bodies and can in any case be valuable tools in developing and refining your offer.

- A **logic chain** identifies the demand/need, inputs, activities, outputs, outcomes and impact (longer-term goals/objectives) of a project or programme
- A **theory of change** uses a backward mapping process starting with the overall difference or impact you want to make, identifies the outcomes related to this and the linkages between them, then defines the activities needed to deliver specific outcomes (with related evidence) and other interventions needed.

Figure out the finance

It may sound obvious but you need to spend time working on the budget for your proposition. Too often bidders do not have a firm grasp on the finance for their proposed programmes, under-estimating costs or artificially inflating income. If your budget does not match your aims and activities, this will be very clear to bid assessors: a well-defined breakdown of expenditure and income gives both you and potential funders confidence that you have a viable and deliverable proposition.

The budget needs to cover both the costs and income for your programme, recognising that many funders are seeking other investment to 'match' their own and are interested in the sustainability of activity on completion of grant support.

To help with this, you should:

- Involve your financial and operational staff in constructing a budget so that it is realistic and based on clear, agreed assumptions
- Identify all the **direct and indirect** costs including for set up, delivery and management
- Identify all the income including the assumed sources and levels and which costs the different income streams are covering
- If the proposal is based on a consortium or partnership you will need to identify and agree the costs, income and contributions for each member
- Have a clear rationale for calculating unit costs, following any requirements or guidance provided by the funding body
- Assess the budget against the funders' criteria ensuring the eligibility of all your expenditure and income. It can also be useful to check the budget against relevant historical financial data for your organisation and any available benchmarking data for the activity/sector to provide a crosscheck on the completeness, cost-effectiveness and value for money of your budget.

Remember to re-visit your bid/no-bid decision: if the proposition does not 'stack-up' financially or fully meet the requirements of the funding body, don't bid!

Resourcing your bid

Producing high quality bids takes time and effort and often takes much longer than you initially think. If you don't have dedicated in-house bid writing resource you need to be aware of competing pressures on staff, including on-going operational delivery or multiple applications, and factor these into your bid plan.

You may decide to bring in external bid writing expertise to support the process. This can be an effective way of balancing the pressures of a bid deadline and 'business as usual' service delivery. However you do need to carefully select, manage and support this input.

To help with this, you should:

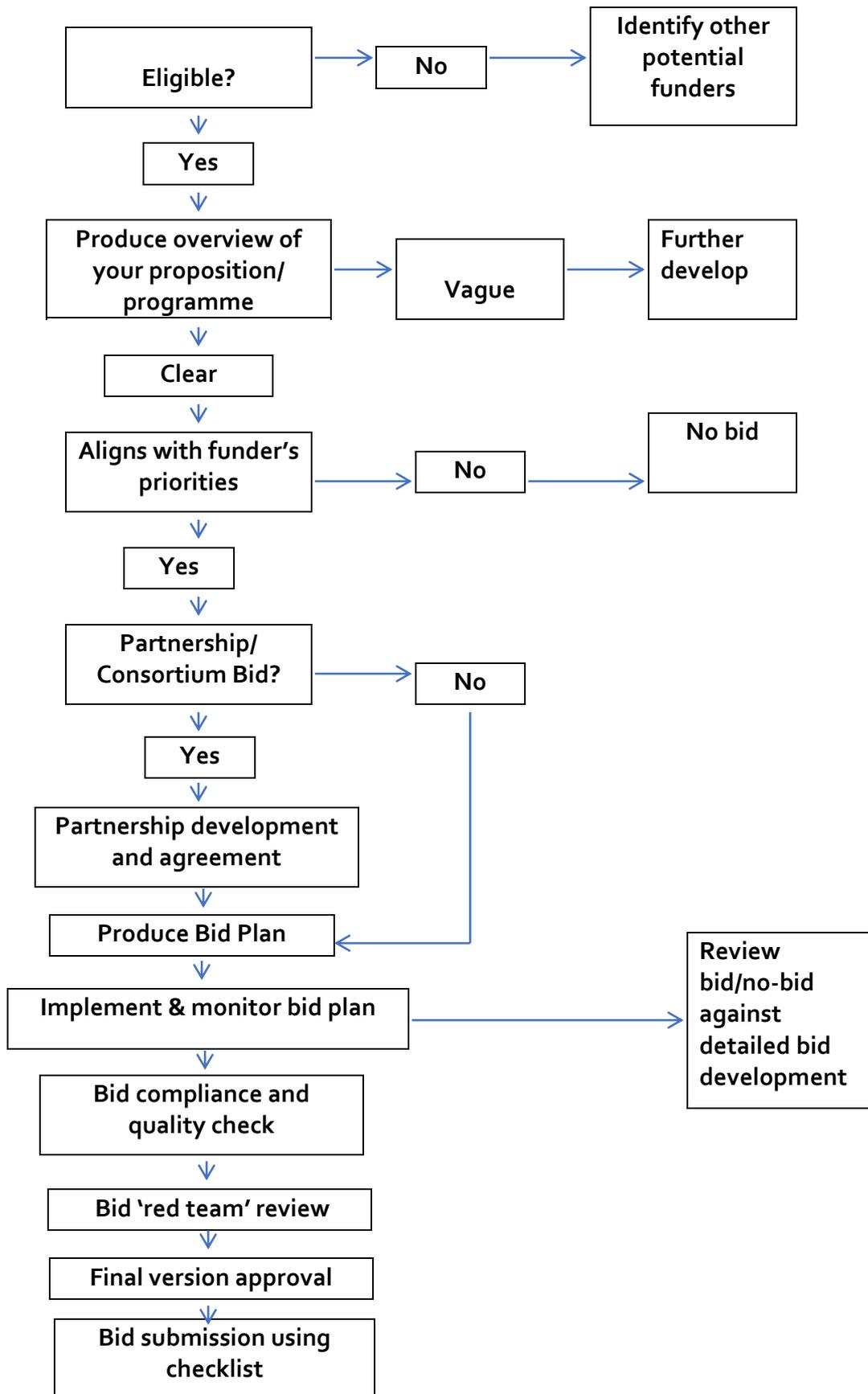
- Choose a bid writer with directly relevant experience and proven track record
- Be clear about how you want to use them e.g. pulling content together from across the organisation/partners, drafting narrative, critically reviewing drafts
- Ensure they understand and work to your bid plan
- Retain ownership throughout the process: **it is your bid** not theirs and you don't want to be in a position of having to present or deliver a bid that you don't understand
- Have a clear procedure for final approval and submission of the bid by your organisation (not by an external consultant).

Submit on time

The bid submission deadline must be met: failure to submit on time will mean that your bid is rejected. Make sure you understand how the bid should be submitted and what documents need to be sent. It is helpful to have a checklist of all the documents that form part of your submission and any supplementary documents that are also required e.g. latest accounts, form of declaration, copies of CVs.

Some funding/commissioning bodies use an online procurement portal: you will need to be familiar with how this works and schedule in sufficient time to upload all your bid documentation always allowing for system crashes/IT problems. If the submission is by email ensure that you request confirmation of receipt and retain hard copies of all emails and bid documents.

Figure 1: Bid planning flowchart



4. Principles of good bid writing

There is no magic formula to writing a successful bid and even high quality bids can fail: resources are finite and you are in a highly competitive environment. There are however some general rules that, if followed, can improve your chances of success.

Understand the funder

Funders are not trying to trick you: they want to invest their finance to achieve their objectives. You need to have a detailed understanding of what they want. Read & re-read the funders documentation, including the specification, prospectus or guidance together with the bid appraisal criteria and process.

Do your homework! Study the funders' strategy documents and any research publications they have produced. If you are bidding with other partners ensure they also have an understanding of the funders' priorities. Use formal clarification processes to post questions to the funder and examine published Q&A logs to track the queries and responses to other potential bidders.

Do as you are told!

You must comply fully with the bidding instructions issued by the funding body. Ensure you adhere strictly to any prescribed format, structure, page/word or character count parameters and complete all the required documentation answering all the questions inserting N/A rather than leaving a blank space.

Do not cut and paste content from previous bids. Whilst you may think this saves time it risks content not being tailored to the specific requirements of the opportunity and will not impress bid assessors.

Some funders have predetermined eligibility flags in their bid documentation. Do not submit a bid that contains any ineligibility indicators: by doing so you are asking to be failed at the first hurdle.

Don't assume

You may have an existing relationship with the funding body, for example as a current or past grant holder, or believe that your organisation has a high profile in your sector. Do not assume that the person or panel that will be assessing your bid knows about you or your work. Describe clearly and positively your organisation and your track record: focus on presenting a credible, experienced and capable organisation that offers a sound investment for the potential funder.

Align

You may consider that your proposition is 'the best thing since sliced bread' but if it doesn't meet the requirements and priorities of the funding body your bid will fail. Show how your programme meets, or exceeds, the funders' priorities: spell out how it aligns with both the specific requirements of the funding opportunity and the

wider objectives of the funding body. Try to put yourself in the funders' shoes and address what you would want to see in a bid.

It can be also helpful to identify your '**win themes**': these are a limited number of high level features of your bid that you believe will deliver the funder's priorities and differentiate you from competitors. Once agreed, your win themes should be threaded through your bid narrative.

Evidence, don't assert

You should avoid generic statements and assertions: it is not enough, for example, to claim to do good work or be a 'leading provider', you have to be able to show it. You need to demonstrate the strength and uniqueness of your experience, capability and proposition without exaggerating.

You should use a range of relevant evidence that could include: your own quantitative and qualitative data; evaluation reports; published research; quotes; consultation feedback and testimonials from past beneficiaries, partners and stakeholders.

Remember it is not sufficient to just cite research and evidence: you need to show how you have used it to inform the design of your proposition.

Example

Our programme design has been informed by:

- *Consultation with local schools, young people and employers including: a bespoke survey with 10 schools, 50 employers and 200 young people with 4 focus groups to identify their work experience needs, wants and barriers*
- *Evaluation of our previous programmes including the Independent Evaluation Study (MBC, 2016) of our Job Insights provision*
- *Analysis of relevant published research on quality work experience including from the CEC, Gatsby Foundation, CIPD and NFER (links to online reports)*

In response to this data our programme design prioritises:

- *Pupil, teacher and employer planning, preparation and review via tailored workshops, integrated curriculum content and online resources*
- *Application of an outcomes-based framework for work experience placements*
- *Employer engagement in key local sectors including business, finance and professional services, digital/creative and media, tourism and hospitality with employer training and support bespoke to company sector and size*
- *Support to pupils who are clearly identified, against criteria agreed with participating schools, as at risk/disadvantaged including Pupil Premium cohorts.*

'The 3 Cs'

Remember that your bid may be one of many, sometimes many hundreds, to be assessed by the funding body. You need to make it as easy as possible for assessors to read and understand your bid and at the same time 'sell' your proposition.

Try to use **clear, concise and compelling language** and be positive and confident in your drafting. For example: avoid jargon and unnecessary repetition, details or generalisations; use action-oriented words such as 'increase', 'improve', 'develop', 'deliver' and avoid words like 'could', 'may', 'should'; and mirror the language of the funding body.

Don't copy sections from the funding specification or guidance into your bid: this is a waste of space and effort. Rather reference specific parts of the specification or other relevant publications and describe how your programme meets these.

Make the content interesting and accessible

It can often be easier to understand numbers and processes when they are presented graphically rather than in dense narrative or long lists of data. Info-graphics and illustrations are an effective way of visualising and emphasising bid content.

Use charts, diagrams and tables to bring your bid to life and to illustrate your key messages. For example, tables can be a useful and concise way of showing how your proposition matches to and supports the funder's objectives and other priorities and standards e.g. Gatsby Benchmarks, key outcome measures. Be aware of the need to avoid 'graphic clutter' and carefully place and reference graphics in relation to text content, ensuring that they are labelled and clearly visible both in print and on-screen versions of your bid.

Also bear in mind that if your bid is about supporting people (rather than for example capital works or infrastructure) you need to weave in some *human interest* to your bid content. Using pen profiles, case studies, direct quotes and testimonials can help demonstrate that you understand and are able to successfully engage and support your target population groups.

Examples

- *"I would like to take this time to thank you for this wonderful opportunity. I've enjoyed myself way too much and learnt so much about the business. I hope to get a job working for the company at some point as they really did like there"* (work experience student)
- *"The future scares me. I don't know what the world has in store for me but now I feel confident going into the future and the unknown"* (15 year old student)

- *"I had absolutely no idea there were jobs like this locally. It really opened my eyes"*
- *"I now understand how difficult it is to turn an idea into a business" (enterprise education student)*

Dot the 'I's`and cross the 'T's'

Remember that your bids give potential investors an impression of you as an organisation. A poorly structured, difficult to read bid that contains spelling or grammatical errors or incomplete responses will not instil funder confidence. Make sure that you rigorously proofread and sense check drafts of your bid including checking the accuracy of all figures (data, finance and targets), the cohesiveness of text, figures and illustrations and the overall structure and presentation.

Fine-tune your finance and figures

Many well-written bids are let down by the numbers. Numerical errors, omissions and inadequate supporting rationale for bid finance and targets will significantly reduce your chances of success.

You must check and re-check the accuracy, eligibility and cohesiveness of all your bid finance. Ensure you provide a convincing rationale for your costs and income and spell out how this provides the funder with value for money. If your costs, including unit costs, are higher than sector averages explain why e.g. high staffing ratios for clients with additional or complex needs, initial set up costs for a new delivery model or entry into a new area. If you don't provide an explanation the funder will take your figures at face value and score this part of your bid accordingly.

Example

The Careers and Enterprise Company require bidders to complete a financial template form. This is designed to provide applicants with progress summaries and cues when something doesn't look right. In the example below, the applicant has errors in multiple parts of the form and so needs to do further work on the content. The application should not be submitted if the form is flagging "incomplete or ineligible" content.

Checklist

Application Overview	Incomplete	
Eligibility - Part A	Criteria incomplete	
Eligibility - Part B strand I	Criteria incomplete	<i>This checklist provides a summary of your progress. You can refer back to this checklist at any point.</i>
Eligibility - Part B strand II	Not Eligible	
Your Organisation	Incomplete	
Your Programme	Incomplete	<i>Make sure your application is complete before you submit.</i>
Delivery and costs	Incomplete	
Rate Card	Not required	
Ready to submit?	Application is incomplete or ineligible	

If you don't understand something in the funder's application documents or think there may be error in their financial templates, make direct contact with them or post a query through their clarification process.

Explain the basis for your proposed bid targets and outcomes. This can include reference to your historical performance data, market penetration and service delivery assumptions and/or evidence of demand for your proposed programme. Even if you are not directly asked, provide brief details of the processes and systems you will operate to monitor, report and manage your performance against targets.

Don't over-promise: remember if your bid is approved you will be expected to deliver against a contract/grant agreement that contains your targets. You do not want to start your relationship with a funder by having to backtrack on your bid.

Check compliance and quality

Even if you are happy with your bid you need to check it back against the funders' guidance and appraisal criteria. Having a fresh pair of eyes, for example a colleague or someone external to your organisation, critically review a full draft of the bid is a really useful exercise. They will often spot things that have been missed in the drafting process and offer valuable suggestions for strengthening the bid.

At a minimum you should carry out a bid compliance and quality check at final draft stage. Using the funding body's published appraisal criteria to self-appraise your draft will help ensure that it complies fully with all their requirements and will highlight aspects of the content that can be improved to gain maximum scores. Be aware of any minimum thresholds and weightings in bid scoring frameworks.

Shine!

Take the time to polish your bid. In the face of increasing competition for investment you need to elevate your bid above others. So refine your bid content, focus on highlighting your **Unique Selling Points (USPs)** such as your achievements, awards, innovation or partnership approach and what differentiates you from your competitors.

Examples

- *The TR has developed a reputation for effective innovation in the development of digital skills for both public and private sector clients (examples cited)*
- *Our work is regularly showcased at the highest levels of Government (examples cited) We have increased our secondary school reach from 29% to 55% since 2012 and are on target to achieve our target of 75% by 2019.*
- *We are supported by an Advisory Council of sector experts (members cited) bringing skills and influence across education, business and social mobility: this helps to identify, drive and support learning and positive change across the sector.*
- *Our team is multi-disciplinary bringing together youth educators, teachers, artists, chefs, gardeners, carpenters, action researchers and organisational change practitioners. This enables us to flex our services to the needs and wants of young people so that we can directly improve their engagement and achievement.*
- *We are involved in the development of a new quality kite mark for social action projects and are currently piloting a programme backed by national Foundations (cited) the results from which we will proactively share*
- *The youth panel plays a key role in our operation. This brings together young people passionate about our work. We consult them on new programmes and soundboard ideas on them. Most significantly we develop their confidence, skills and capacity to directly influence the services that are designed to support them.*

You should also consider the added value you can provide to the funding body if they invest in you. **Added value** is about delivering extra benefits to the funder at no extra cost. It can take a variety of forms, such as:

- Financial including providing economies of scale, efficiency gains or additional investment;
- Strategic including delivering a substantial contribution to the funders objectives e.g. driving system change, innovation and sustainability; and
- Capacity including collaborative partnerships, adding skills, new service delivery routes, research or market intelligence.

Example

In addition to delivering target outcomes, we offer significant added value including:

- *Complementary public and private investment of over £1M*
- *Developing new digital delivery routes for information and advice for young people and employers that will enable increased service reach and provide improved service efficiency and sustainability*
- *Access to our research expertise and intelligence including our longitudinal work and externally commissioned impact evaluation.*

A useful input at this stage, particularly for high value bids, can be a '**red team review**' of your almost final draft bid. A red team comprises people who can undertake a critical review of the bid as if they were the funder's assessment panel. Their role is to identify weaknesses and any inconsistencies in the bid and make suggestions on how these can best be addressed. Members of a red team can be drawn from within your organisation or externally but should not include the main bid writer (their job is to respond to the feedback). Do make sure that if you are planning to use a red team review you schedule this into your bid plan.

5. Presentations and interviews

If your bid is shortlisted you may be asked to deliver a presentation or attend an interview. This is your opportunity to convince the funder that they should invest in your organisation and proposition. Do make the most of it!

Administration, information and materials

Make sure you attend to the administrative aspects of this part of the bidding process. Remember you want to maintain an impression of a professional and capable organisation. For example: confirm your attendance, time and venue; try to ascertain who will be present on the panel; and if you are asked to provide additional materials before or at the interview fully comply with such requests. Avoid information overload with materials distributed at the interview as panel members will not have unlimited time to read through piles of paperwork, promotional documents or folders full of detailed procedures.

Who attends?

Consider carefully who will represent your organisation, or partnership, at this stage. It may not always be appropriate for the bid writer to be on 'your team': though you are still 'selling' the focus is starting to move towards implementation. You should have a clearly designated lead person, responsible for planning, preparing and leading the presentation/interview and for covering strategic content. Also consider including an operations/service delivery 'expert' and if local links/relationships are important, a locally based staff member. Do ensure that the whole team are properly briefed and have agreed roles and lead topic areas.

Examples

- **Organisation A** attended the interview with the Chief Executive (CEX), Head of Operations, Business Development Manager and Employer Engagement Officer. This enabled the bidder to effectively span the strategic and operational delivery aspects of the bid, provide a cohesive rationale on how the investment aligned to the funder's and their own priorities and describe how the programme would be delivered and the measures they had planned to address the challenges of engaging employers in a new delivery area
- **Organisation B** attended the interview with the two founding directors of the company together with a core member of their service delivery team. This enabled the bidder to communicate their passion and commitment and to provide a clear explanation of the 'hands on' approach that they would take, as a small business, to developing, managing and delivering their project
- **Organisation C** had a member of their regional delivery team at the interview who was able to give specific details of the bidder's links with key sectors in the target area, their relationships with schools and how their proposed programme would be co-ordinated with other local programmes and resources.

Prepare ...and practise

Prepare well ensuring that you know the content of your bid in detail, refresh your understanding of the strategic and investment priorities of the funder and are clear on the key messages you wish to communicate to the funder. As with your bid preparation, focus on what the funder wants and imagine what you would be looking for and the questions you would ask if you were their side of the table.

You should be prepared for questions about the figures in your bid: so make sure that at least one of your team knows the details of your budget, both the costs and income assumptions as well as the target volumes, outputs and outcomes.

If you are doing a presentation either using slides or hand-outs, make sure the content is concise e.g. each slide containing no more than six carefully chosen bullet points and use graphics to make it more engaging and interesting. Think about how

you bring the experience of your service delivery alive such as using client journeys, film/video clips and case studies. Try doing a 'dry run' with colleagues.

Be authoritative, confident and enthusiastic

The funder wants to know that if they invest in your organisation you will deliver so you need to show them you are a credible and capable organisation. Treat each question with respect and answer it clearly: if you do not have the level of detail required, don't 'waffle', rather request that you be allowed to follow up and provide the required details after the interview; evidence your understanding of the wider policy context and key developments for the work; and highlight any examples of innovation and 'thought leadership' from your organisation and/or your partners.

Be flexible...but don't bend too far!

Be open to ideas and suggestions for improvements to your proposal, new thinking and collaboration. For example, engage in a dialogue about how you can improve the targeting and impact of your programme or share your learning and best practice with the funder and other grant recipients. However, do guard against giving the impression that you would be willing to make major changes to your bid unless there is a robust rationale for this. This can be interpreted as a lack of confidence in your own proposition and construed as you 'chasing the money'.

Show commitment

Communicate your commitment both to the delivery of your bid and to a positive relationship with the funding body and other stakeholders. Demonstrate that you: have planned the mobilisation and implementation of your programme; have, or can quickly establish, the systems and processes needed for monitoring and reporting; and that you will work collaboratively if your bid is approved.

Ask your own questions

As you would do in a job interview have a note of the questions that you wish to ask the funding body. This further evidences your commitment and capability and gives the panel a sense of the strength of your engagement with the process. Confirm your understanding of the funder's next steps, decision-making process and timescales.

Be polite

There can be occasions where applicants can feel irritated by the level of scrutiny or particular questions being posed in an interview. Be assertive but remain polite, in good humour and calm. Remember you are likely to encounter similar, and potentially bigger, challenges in your programme delivery if your bid is successful. Demonstrating that you can handle differences in views and frustrations will give the panel confidence in you as a responsive organisation with the attitude needed to manage conflicts effectively.

6. Bidding as a small organisation

Most funders and commissioners recognise that small organisations can bring distinctive strengths to programme delivery including for example, local links, community engagement, niche expertise, flexibility and innovation, and consequently are keen to have smaller providers in their supplier partnerships and investment portfolio.

As a resource intensive process, bidding can present particular issues for small organisations and in using this guide smaller organisations will need to interpret and apply the content taking account of their capacity and expertise.

To help with this, you should:

- Make the most of available advice and support. For example, if you are a voluntary, community or 'third sector' organisation use the often free resources, training, skills sharing and mentoring support offered from infrastructure bodies such as the National Council for Voluntary Organisations (NCVO), School for Social Entrepreneurs (SSE), local Councils for Voluntary Services and the Small Charities Coalition, to develop or enhance your in-house bidding capacity and capability. If you are a private business, tap into support from your local Chamber of Commerce, Enterprise Agency or Business Growth Hub
- Be ambitious but realistic in your bidding. With limited resource you can't make lots of bids so make sure you target your efforts to those opportunities against which you have an identified close fit (i.e. eligibility, priorities, funding levels, outcomes)
- Be clear about the specific strengths (your USPs) that you offer to a potential funder
- Recognise and address any real or perceived risks that a potential funder may have in making an investment in an organisation of your size/scale. You should do this both at bid and interview stages to demonstrate that you understand where the risks lie and that you have been proactive in thinking about how to mitigate them
- Be creative in using the resources and expertise that you have access to. For example, if you have a Board of Trustees/Non-Executive Management Group use them to support your bidding process even if that is just to do the critical friend or 'red review' of your draft bid
- Appreciate that bidding to win takes time and effort. For small, multi-functional teams this can often require 'over and above' effort (i.e. bid writing on top of 'day jobs') to produce high quality bids within tight timescales. Try to re-allocate and prioritise work tasks to take account of this as part of your bid planning and recognise it within your post-submission activities
- Consider forming or using appropriate partnerships or alliances with other organisations to increase your access to larger funding/contract opportunities, expand your reach and scale and mitigate risks for potential funders.

Examples

- **Organisation A**, a small social enterprise with core team of five staff, trained up two staff in bidding through attendance at local and sector workshops and by using online guides and resources in their approach to responding to live bid opportunities. Each of these staff took on bid lead responsibilities for target opportunities using the other as a sounding board for bid content
- **Organisation B**, a small charity, providing niche mentoring services to disadvantaged young people, had a designated bid lead from their Board of Trustees. The Trustee, who had a background in accountancy acted as a member of the bid team, joining meetings via Skype/phone, advising on the budget and costs and provided 'critical friend' input to the bid writer
- **Organisation C**, a small specialist provider of digital delivery solutions joined a local 'Greater Together' consortium to enable it to be part of several large-scale bids for national contracts that required digital expertise. As a result they secured new business across a number of regions which they had prioritised for expansion and benefitted from a higher profile with other potential funders and commissioners
- **Organisation D**, had three core staff all Directors of the company who were also 'hands on' with service delivery. All three staff formed a 'bid team' with one member having designated lead responsibility for bid development. The team agreed a reallocation of scheduled business meetings and drew on service delivery support from its network of Associates to provide the time and space needed for effective bidding.

7. Post-decision planning

If your bid is successful

Congratulations! Some say now the hard work starts: you have to manage and deliver your approved programme in line with the requirements of the funder. Your next steps should be focused on mobilising the contract and programme delivery.

To help with this, you should:

- Work with the funding body to progress the contract agreement and clarify the payment regime, monitoring and reporting requirements
- Test the readiness of and/or adapt your processes and systems to ensure that you can comply with all contractual requirements including monitoring returns and claims
- Have a written operational plan for your bid that clearly describes the services that you will provide and how

- Brief your programme delivery team and any partners involved in delivery, revisiting and revising your delivery plan as required e.g. to take account of the contracting timetable and any changes in delivery arrangements/staffing or the operating environment since your bid submission
- Keep in close contact with the funding body and other stakeholders so that all remain up-to-date with progress and any new or emerging issues or difficulties are identified early and addressed swiftly
- Use the resources available to you to help with programme implementation e.g. The Careers and Enterprise Company's Guide Characteristics of Effective Programmes.

If your bid is unsuccessful

You will have failures: not every bid you make will be approved so it is important to have a process for dealing with unsuccessful applications. This will enable your organisation to capture and use the learning from rejected submissions and inform your future bidding strategy.

To help with this, you should:

- Get feedback from the funding body on your application. If the funder says there were simply too many good applications try to find out more about why others were successful
- Communicate this feedback to all those who were involved in developing your bid. Consider having a bid team 'post-mortem' session to discuss the feedback, identify the main lessons for future bids and make sure learning is formally captured in your organisation's bidding intelligence
- Be persistent: Being rejected feels bad but it's important to keep going so look for other funding opportunities that your work aligns with. Do keep an eye on developments and other planned investment opportunities from the funding body that rejected your bid – you may want to try again.

8. What we are looking for

The Careers and Enterprise Company wants to invest in high quality programmes delivered by credible and capable organisations that can make a real and sustainable difference to the careers and enterprise opportunities and outcomes for young people. In progressing our ambition for young people we will continue to work to four key principles:

- Test, learn and adapt;
- Build on what works;
- Work nationally, tailor locally; and
- Enable and convene the best programmes.

We will continue to make our funding available through investment funds each of which will have specific priorities, objectives and requirements and organisations seeking our funding will need to respond directly to these. There are some common features that we would wish to see in all bids for our investment.

Additionality

Our priority is to expand and improve the impact of careers and enterprise opportunities for young people and we work to the principle of additionality in our investment. We will not provide funding for programmes that would take place anyway or can be funded from national or local government expenditure, commercial income or other available sources.

Evidence-based approach

We want to understand and build on what works in careers and enterprise provision for young people. We have an on-going programme of research with published research reports e.g. "What works in careers and enterprise?", "Effective employer mentoring" and "Mapping Disengagement". Our investment will be informed by, and support the development of, this evidence base.

Collaboration

Partnership working is integral to our purpose and operation and we want to see this reflected in the organisations and activities we fund. Collaborative relationships with employers, schools and stakeholders, including Local Enterprise Partnerships, are therefore critical. We also recognise the value that provider partnerships, formalised consortiums and multi-agency models offer. We welcome such arrangements where there are demonstrable benefits and added value from the partnership i.e. the whole is greater than the sum of its parts, and clear roles, responsibilities and processes have been agreed with all partners.

Value for money

Value for money does not mean the lowest cost: nor does it mean the highest quality service. Rather it can be defined as the optimal use of resources to achieve intended outcomes. We are committed to securing value for money in all our investment and this is reflected in our bid assessment criteria. We consider cost, quality, delivery, performance and risk and undertake comparative analyses including across bids and different types of programmes and with relevant sector benchmarks, in our appraisal of value for money.

Match funding

We want our investment to leverage other funding into careers and enterprise provision for young people. Match funding or added value investment can come from a range of sources including: cash or in-kind contributions from employers and partners e.g. donations, sponsorships, staff, premises, equipment, materials; other public finance and contracts; and funding from Charitable Trusts/Foundations or philanthropic sources. We expect organisations bidding for our investment to be clear about their other funding including: the assumed funding levels, sources and

status (secured, committed or planned); the basis of and systems for calculating and recording in-kind contributions; and risk management and contingency arrangements for addressing any shortfalls in assumed match funding.

Sustainability

Our investment will not provide on-going revenue funding to organisations. Equally we don't want to invest in programmes that will cease or substantially reduce on the ending of our funding. We therefore expect bidders to have considered and be able to describe their sustainability plans. For pilot projects this will focus on how the results and learning will be captured, disseminated and used.

Our future investment

These features give you a general overview of what we are looking for from organisations bidding for our investment. Our specific priorities and requirements will be detailed in a fund prospectus that will be issued for future Investment Fund opportunities.

Glossary

Added value: additional services/inputs over and above the specification and tender requirements that are provided at no extra cost to the funder

Additionality: the extent to which a new activity adds to existing activity, inputs and outcomes as a result of investment (after making allowances for *what would happen anyway* without the investment)

Appraisal: the method by which bids are assessed and judged

Benchmarking: the process of measuring and comparing an organisation's processes, products, services or prices against others of a similar nature

Best value: achieving the best value in procurement taking account of quality, price and the needs of communities

Call off contract: a contract made following a tendering process with one or more suppliers for a defined range of work which the buyer 'calls down' to meet their requirements

Clarification process: the process established and operated by a buyer that enables suppliers to submit queries on tender documentation

Commissioning: the process by which buyers decide how to spend their money in order to get the best possible services

Competitive dialogue: a process where the buyer will hold discussions with shortlisted bidders before a particular solution/offer is selected

Compliance: that information has been provided in the level of detail and in the format as specified or that the organisation demonstrates that it meets the conditions of the tender

Consortium: an unincorporated group of organisations that have come together to bid for contracts/funding that they would be unlikely to win in their own right

Debriefs: provide feedback to bidders on their performance in the procurement/bidding process (in the public sector this is a legal requirement of procurement)

Deliverables: the tangible goods/services or outcomes that the supplier will provide under the terms of the contract/grant agreement

e-procurement: online or electronic methods used for procurement/grant applications

Expression of Interest (EOI): a formal submission by an organisation that is used by buyers to select organisations to be invited to bid/tender

Full Economic Costing (FEC): involves identifying the full costs of a proposed activity i.e. all the actual costs to be incurred both direct (e.g. staffing) and indirect (e.g. overhead)

Framework agreement: an agreement with selected suppliers that sets the terms and conditions under which specific purchases (call-offs) can be made

Intervention rate: the proportion of the total cost that a funding body will cover e.g. with a 50% intervention rate the funder will cover a maximum of 50% of total project/service cost

Invitation to Tender (ITT): the paper or electronic documentation issued by the buyer that sets out background, rules of tender, contract/service specification, information required and possibly a draft contract

Joint Venture (JV): a formal partnership created to achieve a specific aim such as bidding for and delivery of a large/complex service, contract or project

Letter of intent: a letter informing the successful bidder of the buyer's intention to enter into a contract

Match funding: a requirement from a funding body that bidders identify and secure a proportion of the total cost of a programme/project from other sources

Most Economically Advantageous Tender (MEAT): the optimum combination of whole life costs and benefits assessed against award criteria

Payment by results (PBR): the commissioner/funder pays the supplier on the basis of achievement of agreed outcomes (as opposed to paying for service delivery)

Pre-qualification Questionnaire (PQQ): a set of questions designed to help buyers to select the most suitable organisations to be invited to bid

Preferred supplier list (PSL): listing of organisations that have been placed on a buyer's approved provider register having met specified standards and requirements

Service Level Agreement (SLA): a mechanism for setting out the expectations, clarify responsibilities and provide an objective basis for assessing service delivery of a supplier

Specification: the document that sets out the buyers' requirements and standards

Standstill period: once the buyer has announced who it intends to award the contract to a standstill period will follow (often 10 working days) during which time bidders can request feedback on the award decision and may challenge the decision

Sub-contracting: the process where an organisation assigns part of the contract to another organisation (the sub-contractor)

Theory of change: a model used to map how an organisation or programme achieves its desired impact (the difference it wants to make), the needs it is addressing, the assumed outcomes and pathways and activities to be delivered

Transfer of Undertakings Protection of Employment (TUPE): regulations designed to protect the rights of employees in a transfer situation i.e. when there is a change of supplier. TUPE enables affected employees to have continuity of employment keeping the same terms and conditions after they have been transferred to a new supplier/contractor.

Value for money (VFM): an assessment based on the cost of goods or services and the quality of provision

Viability: the extent to which an activity/project has a clear rationale, robust financial plan and is deliverable as proposed

Win themes: high-level features or benefits that differentiate the bidder from competitors

The Careers & Enterprise Company
2-7 Clerkenwell Green
London EC1R 0DE

@CareerEnt
www.careersandenterprise.co.uk