

# Bid Writing Masterclass Part 1 – Housekeeping Rules

Webinar Resource Pack  
6 April 2020



# Agenda:

6:00 – 6:10 Welcome, introductions  
& questions

6:10 – 6:40 How to conduct a high-level  
inventory of your organisation

6:40 – 7:00 How to navigate the current  
funding landscape

7:00 – 7:30 How to track new opportunities

7:30 Close

# 1. How to conduct a high-level inventory of your organisation

“The quicker you become compliant,  
the sooner you can compete!”

# Due Diligence:

“A process, or set of processes,  
that seek to appraise”

- Your eligibility
  - Your financial standing
- Your track record & performance

# Transparency

“The process is open and competitive”

The preliminary rounds are all about answering a range of organisational, operational and financial questions, plus submitting supporting evidence to satisfy your eligibility for funding.

# Pre Qualification Questionnaire

“A set of questions designed so no organisation has an unfair advantage”

- Every question must be answered
- 80% of the questions are scored / weighted response
  - The evaluation criteria is there to help
- The questionnaire is usually made up of 3 parts

Let's take a look...

## 2. How to navigate the current funding landscape

“The pressure of the process will determine  
the pace of your performance”

# To bid or not to bid?

## “The Decision Matrix”

To help you decide whether to bid, you need a framework to guide your decisions. Let's take a look...

### Question

### Things to consider

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**Is the opportunity right for you?**

Look at the key deliverables, duration of the contract, where (location) and when (start and end dates)

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**Is the opportunity financially viable?**

Is the grant amount on offer too small, too large?

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**Can you deliver this yourself?**

Do you need partners, consultants or need to hire staff?

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**Do you have the experience?**

Most funders require you to provide 2-3 references – details of previous clients, grants or contracts held. Is the project something you are familiar with and qualified to actually do?

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**Do you meet the financial standing?**

The golden rule is that you shouldn't bid for a contract that is worth more than 50% of your annual turnover

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**Do you have the time and money to bid?**

Is this opportunity worth investing in?  
Can you afford to commit the time, effort and cost?

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**Would you choose yourself for this?**

If you don't think you could do a good job, don't waste any more time on it.

# The Current Funding Landscape

In 2018/19:

- Local Government awarded contracts worth £3.9bn to SMEs and VCSEs
- Central Government awarded contracts worth £3bn to these organisations

# Service Contract:

- Legally binding between parties for the supply of goods and services
- The specification sets out what exactly is required
  - A contract is delivered when the specific deliverables are completed

# Grant:

- A lump sum, given to an organisation for a specific activity to be delivered
- Funders are usually government departments, charities or trusts
- There are certain conditions i.e. timeframe or type of beneficiary

# Grant Making Trusts & Foundations:

- An organisation empowered to make grants for charitable purposes
  - Whereby a person(s) known as a 'trustee' manages funds for the benefit of others (beneficiaries)
- They do this 'in good faith' or 'in trust'

# In 2018/19:

- The top 300 charitable trusts and foundations distributed £2.7bn in grants
- Many derive their income from an endowment
- Others (e.g. National Lottery, Comic Relief) raise money from the public for good causes.

# Who are they



# What They Fund:

**Start up funding –**

to get a project off the ground

**Revenue funding –**

to cover running costs, including salaries

**Capital funding –**

to pay for building costs or equipment

**Project funding –**

to pay for a mixture of items i.e. overheads,  
management time, external fees

# 3. How to track and register for new opportunities

“Search with speed and security”

Funding portals allow you to:

- Search for opportunities in different sectors
  - Find out what’s coming up in the future
- Look up details of previous tenders and contracts
- Create an account, get updates and save your searches

# Common Abbreviations

<b>EOI</b>	Expression of Interest
<b>ISOP</b>	Invitation to Submit an Outline Proposal
<b>ITT</b>	Invitation to Tender
<b>PQQ</b>	Pre-Qualification Questionnaire
<b>RFI</b>	Request for Information
<b>RFQ</b>	Request for Quotation
<b>SAQ</b>	Suitability Assessment Questionnaire
<b>SSQ</b>	Standard/Supplier Selection Questionnaire

# Glossary of Terms

<b>Bid</b>	A proposal to deliver services to meet the requirements of a published tender
<b>Bidder</b>	An organisation submitting a proposal in response to a published tender
<b>Consortium</b>	A group of organisations, legally constituted, where all partners are jointly accountable for the delivery of a project
<b>Contract of Award</b>	Any organisation that is not a Bidder, a member of a Consortium or subcontractor, but is involved in supporting the delivery of the project. Delivery Partners are not always PAID and they do not always hold a formal CONTRACT or AGREEMENT
<b>Grant</b>	A cash award given directly to an organisation to deliver a service. It is non-repayable, by must be accounted for
<b>Organisation</b>	The term organisation is used to include companies, charities, colleges, universities, sole traders and other types of entity
<b>Output</b>	Outputs are measurable deliverables which attract a payment on achievement
<b>Participant</b>	An individual who is a direct beneficiary of the services delivered
<b>Procurement</b>	The process of purchasing goods and/or services resulting in payment for delivering said goods and/or services
<b>Sole Deliverer</b>	An individual organisation without subcontracting arrangements
<b>Sole Lead Bidder</b>	An individual organisation which is solely responsible for the successful delivery of the services but will deliver (in full or in part) via subcontracting or subgrantee arrangements
<b>Subcontractor</b>	Organisations that are separate legal entities from the Sole Lead Bidder or Consortium, contractually obligated to assist in delivering the Project. Subcontractors are PAID and will hold a formal SUBCONTRACT with the Sole Lead Bidder or Consortium
<b>Sub Grantee</b>	Any person which is funded in whole or in part from the Grant, whether as a supplier, subcontractor or consultant via payment
<b>Tender</b>	A written or formal offer to supply goods or services at an agreed or published price
<b>Unit Rate</b>	The amount payable to the Bidder and/or subcontractor/subgrantee for each output delivered.

# Tender Portals

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<b>The London Tenders</b> The main public sector procurement portal for the London Boroughs	<a href="https://www.londontenders.org/">https://www.londontenders.org/</a>
<b>Capital E-Sourcing</b> The main portal used by Local Authorities in Greater London and the UK	<a href="https://www.capitalesourcing.com/web/login.shtml">https://www.capitalesourcing.com/web/login.shtml</a>
<b>Contracts Finder</b> National website for all government listed contracts – It lets you search for information about contracts worth over £10,000 with the government and its agencies.	<a href="https://www.gov.uk/contracts-finder">https://www.gov.uk/contracts-finder</a>
<b>Pro Contract / Due North / Proactis</b> The main procurement portal used by central government departments (i.e. cabinet Office, DFID, DCMS)	<a href="https://procontract.due-north.com/Login">https://procontract.due-north.com/Login</a>
<b>Bravo Solutions</b> The main portal focused on education, employment and training (ESFA, DWP, NHS, TfL, Defra etc.)	<a href="https://education.bravosolution.co.uk/web/login.shtml">https://education.bravosolution.co.uk/web/login.shtml</a>
<b>Ministry Of Justice</b> The main government portal for offender management contracts	<a href="https://ministryofjusticecommercial.bravosolution.co.uk/web/login.html">https://ministryofjusticecommercial.bravosolution.co.uk/web/login.html</a>

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# Grant Portals

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<b>Grants Online</b>	<a href="https://www.grantsonline.org.uk/search/grants?f=1">https://www.grantsonline.org.uk/search/grants?f=1</a>
<b>Grants Finder</b>	<a href="https://www.grantfinder.co.uk/">https://www.grantfinder.co.uk/</a>
<b>Funds Online</b> The most comprehensive listing, with over 8,00 funders with grants worth £8B+ (formally Directory of Social Change (DSC) Trust & Grant Funding)	<a href="https://fundsonline.org.uk/">https://fundsonline.org.uk/</a>
<b>National Lottery Community Fund</b>	<a href="https://www.lotterygoodcauses.org.uk/funding">https://www.lotterygoodcauses.org.uk/funding</a>
<b>People's Postcode Trust</b>	<a href="https://www.postcodetrust.org.uk/apply-for-a-grant/">https://www.postcodetrust.org.uk/apply-for-a-grant/</a>
<b>London Councils</b>	<a href="https://www.londoncouncils.gov.uk/services/grants">https://www.londoncouncils.gov.uk/services/grants</a>

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# Funding for Small Businesses:

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<b>Government Funded Schemes</b>	<a href="https://www.gov.uk/business-finance-support">https://www.gov.uk/business-finance-support</a>
<b>COVID-19 Support for small businesses</b>	<a href="https://www.gov.uk/government/publications/guidance-to-employers-and-businesses-about-covid-19/covid-19-support-for-businesses">https://www.gov.uk/government/publications/guidance-to-employers-and-businesses-about-covid-19/covid-19-support-for-businesses</a>
<b>List of small business grants/loans</b>	<a href="https://fundsonline.org.uk/">https://fundsonline.org.uk/</a>

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# Differences between a grant and a contract

<b>Grant</b>	<b>Contract</b>
A grant is a gift, usually with conditions attached	A contract is an agreement between two parties
A grant is not legally binding, (but Compact is recommended for governing them)	A contract is a legally binding relationship between two parties
If you fail to meet the conditions of a grant only the amount of the grant needs to be repaid	Failure to meet the contract can result in a claim for damages worth more than the contract
Usually you have to outline how a grant will be spent on the project	You don't have to outline how you will spend the money to achieve the specification
If you don't spend all of the grant you have to return what's left over	If you don't spend all of the money on delivering the service you can keep what's left over.
The price of the grant is based on delivering the project	The price of the contract is based on what is outlined in the tender or what can be negotiated.
Usually grants are for one off time limited projects	Contracts can be for ongoing continuous services



Thank you.



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[uchechi.eke@meetingofmindsuk.uk](mailto:uchechi.eke@meetingofmindsuk.uk)