

# Top Tips for Tendering

Meet the Buyer 2008

# Agenda

- What and how the Council buys
- The process – questions, scoring model & documentation
- Top Tips for tendering
- What should you do next?
- Question & Answers

# Why is public sector procurement different?

- £billions spent annually by the public sector
- Subject to EU legislation – aimed to remove barriers across the EU
- Subject to UK legislation – competition law, Best Value etc
- Subject to audit
- Accountable to government and the electorate
- Many services are sensitive or high profile

# What does Wakefield Council buy?

- Office supplies
- Schools materials
- Plant
- Vehicles
- Training / educational services
- Advice and consultancy
- Research
- Food
- Professional services
- Social care
- Construction
- Decorating
- Renovation
- Maintenance
- Footpaths and highways
- Landscaping
- Etc... etc... etc...

# How We Buy

- Contracts less than £15k (quotations where appropriate/must be competition)
- Contract Value £15k - £75k = Competitive Quotation
- Contract Value more than £75k = Advertised Tender
- Quotations over £10k are placed on Supplier and Contract Management System (SCMS)
- Standard template documents for all processes

# Procurement Documentation

- Pre-Qualification Questionnaire (PQQ) – used to shortlist suppliers to be invited to tender
- Invitation to Tender (ITT) – formal tender documentation
- Invitation to Quote (ITQ) – used for obtaining competitive quotations
- Conditions of Contract – WMDC conditions issued with the ITQ or ITT document

# Questions we ask

- Company information
- Financial
- Insurance
- References / experience
- Equal Opportunities
- Business activities / capacity
- Environmental
- Health & Safety
- Quality assurance
- Tender-Specific Questions

# Scoring Model

## Most areas assessed against:

0	Fails to provide any information / information totally inadequate
1	Information incomplete - significant indications that company lacks ability / experience / expertise / resources / structures etc to deliver service required
2	Information complete - concerns that company may lack certain essential requirements in this area to achieve the required standard of service delivery
3	Information complete - Indicating potential suitability for invitation to tender
4	Information sufficient to indicate company capable of delivering service to required standards

## Some based on pass/fail – e.g. financial, insurance, completeness of document:

PASS	Information provided as required and sufficient to indicate that there would be no risk or an acceptable level of risk if the Council were to award a contract
FAIL	Information not provided or demonstrates that the level of risk associated with awarding a contract is unacceptably high

# Ten Tips for Successful Tendering

# Read the documents

- Read everything carefully.
- Make sure you understand what is required.
- If there isn't a checklist for returns, make your own.
- Treat it like an exam – answer the question.
- Don't assume anything

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# Provide all information requested

- Provide all of the information requested.
- If you cannot provide some of the information, for whatever reason, ask for advice.
- Don't add unnecessary information.
- Be clear and concise – use plain English.
- Avoid jargon and acronyms.
- Identify what differentiates your company, products or services from the competition and emphasise it.
- Check costs for discrepancies

# Don't include publicity material

- Don't include publicity material in your submission unless you have specifically been asked to.
- Don't answer questions by referring to publicity material or brochures.
- Make your submission specific to the contract; don't rely on standard documents.

# Don't be put off by the documents

- Take your time and make notes.
- If unsure how to complete the tender, ask for help from business support organisations.
- If you unsure what is being asked, or the documents are confusing, don't be afraid to ask for clarification.

# Complete and return the documents on time

- You must complete and return the documents by the given time and date – or face being disqualified.
- Make sure to sign anything that should be signed if tendering on paper.
- Don't leave it to the last minute!

# Make it easy to evaluate

- Where relevant, cross-reference the answers or responses in your tender to the questions in the invitation to tender. This will make it easier to evaluate.
- Always explain and cross reference any appendices.
- Print rather than complete by hand.

# Be specific

- Be clear on your pricing model.
- State any assumptions you have made when pricing (for example, resources required by you and / or the Council, timetables, etc.).
- Be consistent throughout your tender.
- Be realistic. If you don't have the necessary qualifications, capacity, experience, withdraw or seek a partner organisation.

# Understand your client

- Research their website.
  - Read their procurement strategy.
  - Check for any Council / Cabinet reports relating to the tender.
- Don't assume knowledge of your company, products or services by the buyer; you will only be scored on the contents of your submission.

# Ask for a debrief

- If you are unsuccessful, make sure you ask for a debrief; you are entitled to one and it will help you to understand where you went wrong.
- If you are successful, still ask for a debrief to find out why you were successful or where you could improve.

# Register with Supplier and Tender Systems

- For example – The Yorkshire and Humber region operates a Supplier & Contract Management System (SCMS).
- It provides any organisation with the opportunity to register an interest in supplying goods, services or works to Wakefield and the other twenty-one authorities in the region.
- The SCMS also enables organisations to tender electronically with Councils across the region and seek out new business opportunities.
- Completely free of charge
- No special software / hardware
- Register at: <http://scms.alito.co.uk>

# What can you do now?

- Register at <http://scms.alito.co.uk>
- Visit [www.wakefield.gov.uk/procurement](http://www.wakefield.gov.uk/procurement)
- Familiarise yourself with the standard documentation used
- Monitor the local press and European Journal (OJEU) for adverts
- Ensure 'standard' information is easily accessible and up to date, e.g. insurance details, equal opportunities... etc...

# Contact Details

- SCMS Helpdesk  
Tel: 0113 2474001
- Wakefield Council Procurement Team  
[procurement@wakefield.gov.uk](mailto:procurement@wakefield.gov.uk) tel: 01924 306781
- Business Link Yorkshire  
<http://www.businesslink.gov.uk/yorkshire>  
Tel: 08456 048 048
- Federation of Small Businesses  
[secretary.westyorkshire@fsb.org.uk](mailto:secretary.westyorkshire@fsb.org.uk) tel: 01924 283548

# Questions & Answers