



action 
planning
let's start from here

STRATEGY & FUNDRAISING

Winning statutory bids & contracts

Presented by Ray Jenkins

Presentation outline

Session 1 - Environmental Scanning

Commissioning Frameworks
Understanding market forces
Developing unique selling points

Session 2 - The Bidding Process

Pre-qualification questionnaires
Gateway questions
Tender preparation

Session 3 - Retaining Contracts

Relationship management
Impact analysis
Capacity building
Workforce development



Session 1

Environmental Scanning



The changing Government agenda

'Today's Local Government' White Paper and 2007 Treasury Review:

A new duty to ensure community participation, involvement and choice.

Sustainable community strategies will deliver social inclusion and partnership.

Mixed use of grants and contracts available for 3 years+ (by 2008).

Principles of commissioning to be established with a 'level playing field'.



The Government agenda Cont...

Audit commission - Hearts & minds: commissioning the voluntary sector

Diverse supply base is more competitive

Councils currently spend £3 billion with voluntaries

Smaller voluntaries unwilling or unable to compete

Capacity building should complement good commissioning.

Councils re-aligning grants to meet strategic priorities

Application of 'intelligent commissioning'



Intelligent commissioning

Understand
service needs

Redesign
services

(Where appropriate)

Commission
user-focused
outcome-based
services

Understand
the market

Develop the
market

(Where appropriate)

Consider
long-term impact
& contestability

Understand
procurement

Improve
processes

(Where appropriate)

Ensure most
appropriate
service provider
chosen

Value for money services

Commissioning frameworks

Efficiency savings of 3% p.a. required and are driving service procurement.

Capacity building programme starting with commissioners in 2008 through IDeA.

Increased competition from foundation trusts, private & statutory sector (partnership opportunities).

Efficiency gains continue to drive funding, integration will grow in importance.



Understanding market forces

Fundraising; more streamlined, bids completed quicker and to a higher standard.

Local knowledge, partnership and flexibility is becoming more important.

This must be underpinned by systems and support that can deliver consistency, quality and innovation.

Demands for an evidence based approach will grow.

Direct competitor analysis



Developing unique selling point

Statements such as; established track record, high quality staff & service delivery and service user led are not unique.

Such statements need to be evidenced based.

You will find your USPs in:

Accreditation & awards

Service outcomes & local impact

Ethos & approach

Innovation & creativity

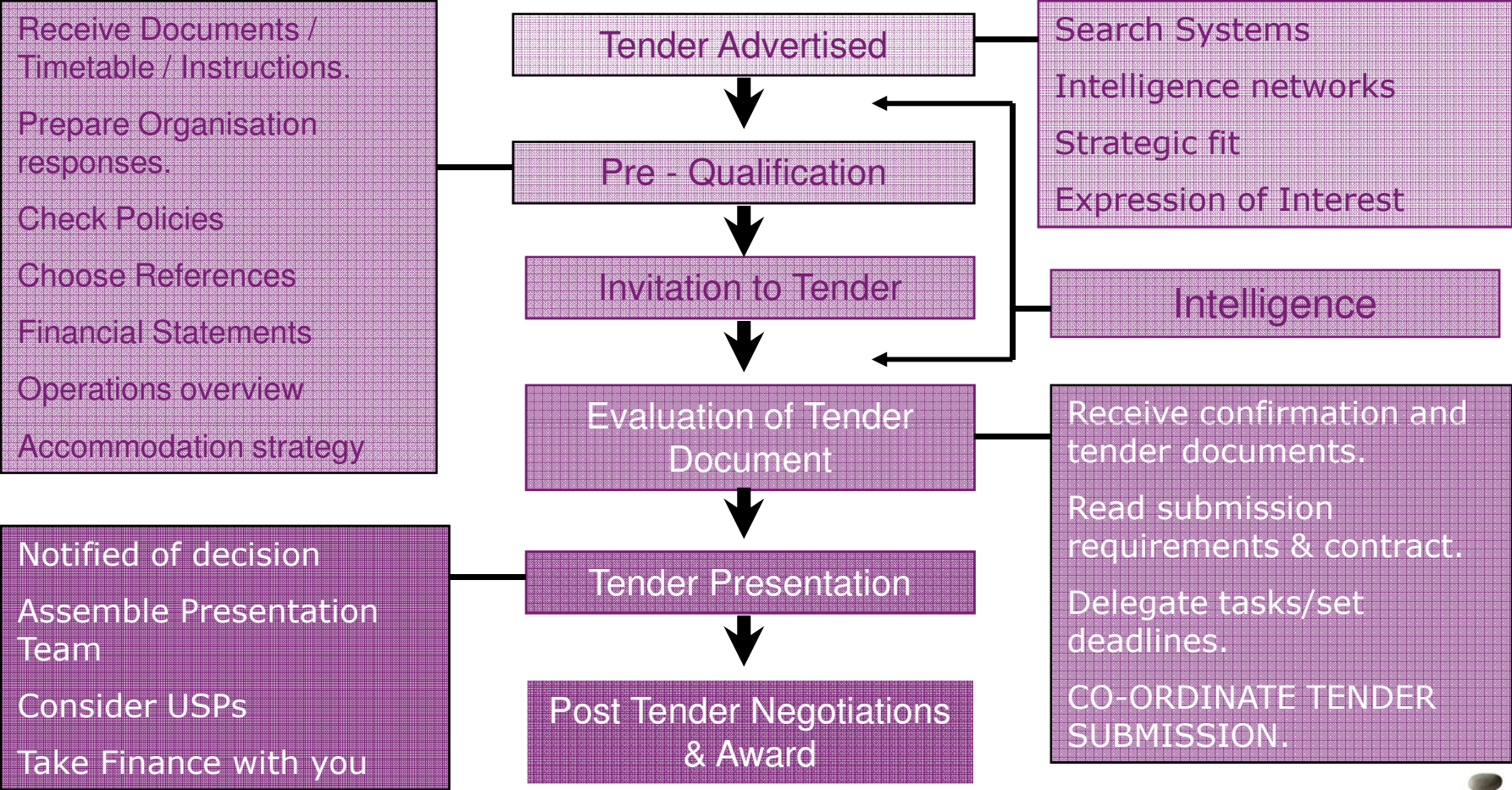


Session 2

The Bidding Process



The Bidding Process



Scoring frameworks

Weightings for each section

Scores for each section

Consider weighting index

Explanations of what will provide a high score.

Be aware! bids may only be considered on a met or exceeded basis.

Check for critical or 'gateway' questions



Justification for scoring

Provides a fair and transparent system

Offers confidence that an organisation is capable of delivering for the period of the contract.

Benchmarks against best practice

Separates winners and losers

Sets an acceptable / justifiable standard

Ensures that the contract meets the funders' aims



Pre Qualification Questionnaires

The first screening process

The quality standard 'bar' has been raised

Don't assume the assessor knows your business

Track record needs to be evidenced

Policies & financial accounts - up to date

Increasingly becoming part of overall score

Develop 'bank' statements (HR)



Submitting a tender - Basic tips

Pre-research criteria, they tend to be similar across funding bodies.

Attend meetings to seek additional information (Ask Qs)

Consider what are your organisation's unique selling points

Provide answers that reflect partnership.

What is it that you will be doing on their behalf?

Demonstrate an understanding of good practice & benchmark.

Get your bid checked by someone with the knowledge to comment.



The seven golden rules

- 1.** Convince the commissioner that your bid demonstrates that you understand and can meet their aims, outputs & concerns.
- 2.** Developing a project to fit a bid will make it much more likely to be funded than trying to fit a project into the funding.
- 3.** Use an evidence based approach when answering questions; rely on your track record and evidence framework.
- 4.** Technical answers must be underpinned by good practice.
- 5.** Follow instructions exactly; provide what is asked for.
- 6.** Lead with the need; beneficiary, community & commissioner.
- 7.** Statutory Fundraising is about margins not turnover.



Evaluation & final decision

Evaluation processes

Scoring panel

Internal / external moderation

Appraisal against specification

Executive decision making

Final Decisions

Panel may rely on short project description

Only bids exceeding scoring criteria considered

Political and other factors may be critical

All bids will be subject to a reality check



Session 3

Retaining Service Contracts



Relationship management

Establish & maintain commissioner relationships

Commissioners are donors

Recognise the authority in the relationship

No statutory right to deliver services

Let services deliver the reputation/relationship

Staff & outcomes are your best advocates



Relationship rules

1. **Develop a mutual regard, each of the other**

Learn contract detail, culture, drivers, politics & values

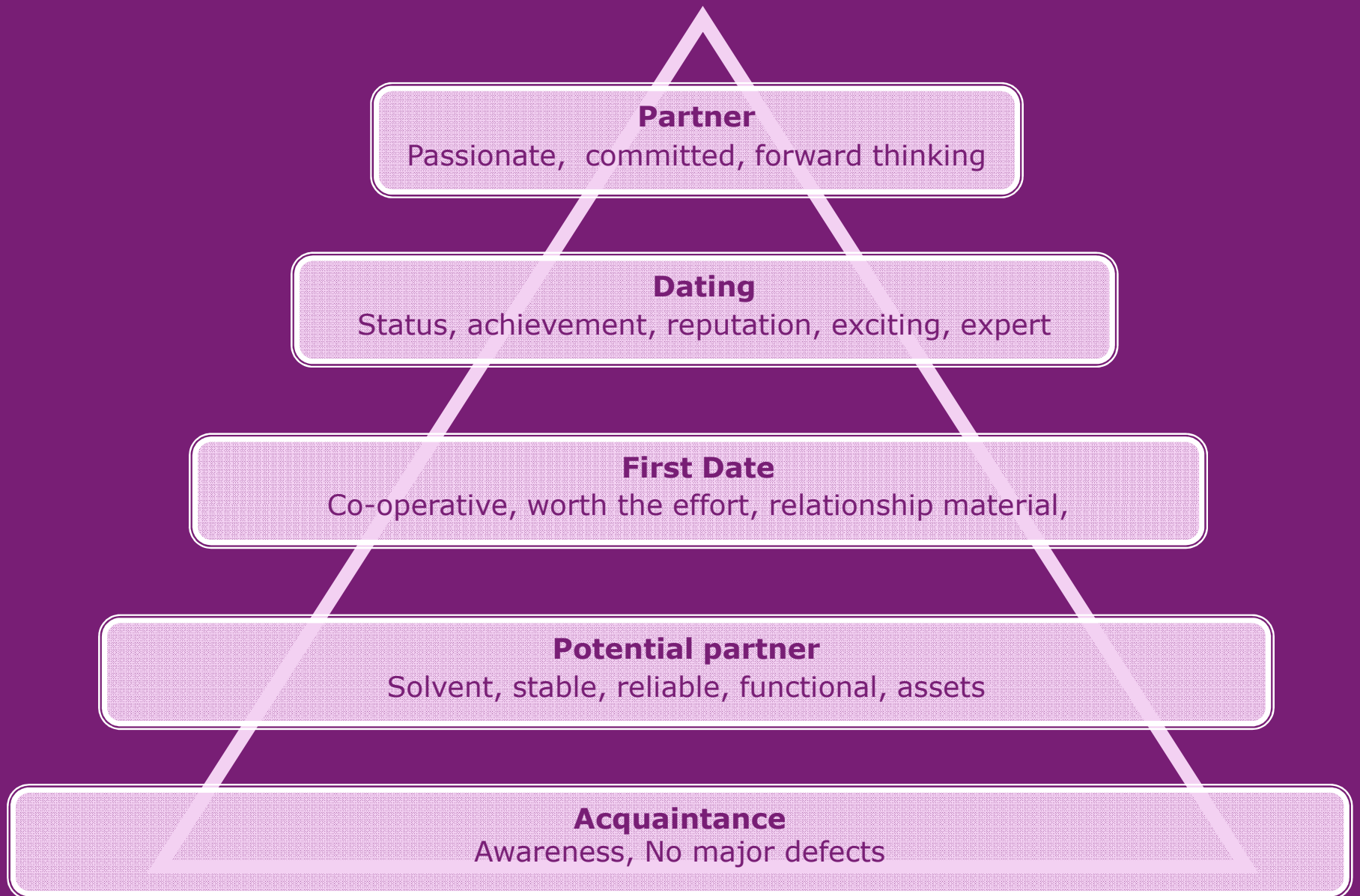
2. **Take the initiative and develop a dialogue**

Listen, be mindful of above; we have no monopoly on ideas, morality or ethical stance, or necessarily have the big picture.

3. **When challenged, hold your nerve & respond.**

Negotiate, don't let your managers react; remain open to suggestion under pressure.





Marketing – core concepts

Commissioner - Needs, wants and demands

Provider - Products and services

Together - Value, satisfaction and quality

Brand value - Reputation & relationship

Brand Loyalty - Knowledge of changing market



Impact Analysis

Client > Community > Commissioners

Innovation matters

Influence policy development

Quality management frameworks

Outcomes > Aims > Outputs

Monitor the 'soft' outcomes

External evaluation & research



Capacity building

Management infra structures

Finances (FCR)

Third sector marketing

Staff autonomy (delegated authority)

Professional development frameworks

Succession planning

TUPE process and culture



Workforce development

Vocational workforce

Opportunity to make a difference

Competitive T & Cs

Delegated authority/autonomy

Business related skills (finance & people)

Realistic targets based on need

Client need remains at the centre of service delivery





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Thank You
Any Questions?

strategy and fundraising consultants