



Easy-to-Use Govt Tendering Template for Micro and Small Businesses

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Easy-to-Use Government Tendering Template for Micro and Small Businesses

Detailed below is a template to assist in the preparation of documents for government tendering processes.

Government Tenders

Understanding the environment for government tenders

Governments tender for goods and services in order to get the best product at the right price.

The process is competitive, and a set application pack with specific selection criteria applies for each process.

Exactly the same information is given and available to every applicant organisation to ensure that no competitive advantage applies. Many tender processes will have some form of information session available to potential applicants in advance of the tender process commencing. It is advisable a potential applicant attend these opportunities.

The assessment process is subject to rigorous scrutiny and probity processes. The decision making may be centralised, or devolved—depending upon the program and the Minister and Department involved.

The process for the applicant is time consuming, and requires a lot of effort, time and organisation. The burden of proof in meeting the selection criteria falls solely on the applicant.

Try to find out who is assessing and who is approving the tenders. If it is local people you may use more local language. The more you know about the people involved the more you can tailor the language to their needs.

The common behaviours and skills of people and organisations who frequently win tenders

The organisations who frequently win tenders are those who are organised, prepared, resourced adequately, and able to demonstrate they have the necessary skills and experience to meet each of the selection criteria.

Successful tenderers are aware of what the government is trying to achieve through this tender..

Successful tenderers understand that in this environment “the government” is the customer.

Successful tenderers know that in actual fact they are not dealing with “the government” but with individual public servants who are involved in the selection process and that those people have their own guidelines to follow.

Successful tenderers communicate and write for the individuals involved in assessment process.

To repeat an important point, successful tenderers treat “the government” and its public servants as customers.

The assessment and approval process—who is approving this and how

The process may vary slightly depending on each tender, but it is most likely that a panel made up of public servants will assess the tender. Strict probity procedures and processes will be in place, and every application will be handled in a confidential manner. Probity procedures are designed to ensure that there is no favouritism shown to any particular tender and that guidelines and procedures are followed.

The assessing panel will be assessing the tender against the selection criteria. They will also ensure that all of the requested information has been provided. For this activity each panel member will have a checklist of their own—that checklist will sometimes be available to tendering organisations from a website. If you can get a copy of the checklist it will help to write a better tender that gets the ticks and positive comments that you need.

If the selection criteria have not been fully met, your tender will not be considered suitable. In the absence of any other suitable applications the public servant may contact you and ask for further information, but in most cases if you get the selection criteria wrong then you will not get the work.

Where your tender has been considered suitable it will receive a rating and will be compared with other tenders.

Recommendations will then be made to a supervisor who will endorse the recommendations and forward to a delegate for approval.

The relevant Minister for the Department is then informed about who the successful and unsuccessful tender applicants have been. All tender applicants are advised of the outcome by letter, and unsuccessful tender applicants offered a feedback on their tender by the Department. If you miss out, then make sure to get feedback, it sometimes hurts to get criticism but it will provide information you need to understand why you missed out and either write a better tender or perhaps not tender for that type of work again as the competition is too high.

Working with public servants

The tender process is developed to get the best value for money for the tax payer and to show that the process has been open and will survive any legal or parliamentary scrutiny.

Public servants are bound by a Code of Conduct, and ethical standards and, believe it or not, most of them follow those rules. The frustration for a tenderer and for a lot of public servants is that the process seems to get in the way of selecting the best tender. A good tenderer will appreciate this and will write a tender that engages the public servant who is assessing and also give them the capacity to tick all the right boxes and recommend your tender. There are plenty of public servants who are frustrated by the process, they may want to award you the tender because of the obvious skills and experience you possess, but if you haven't followed the tender guidelines properly, then they simply cannot award you that tender, or if they do, they may end up hauled across the coals of a Senate estimates committee and grilled on why they failed to follow the rules.

Make sure you give the public servant every opportunity to approve your tender.

Public servants cannot be seen to favour any particular person or organisation, no matter how much they want to. As a result, when working on a tender process they must adhere to strict probity processes, which means they must share the same information with every applicant, and abide by the same rules of process for every tender they receive. They do not have the individual discretion to be able to provide advice, assistance, or extensions of deadlines. Extension of deadlines can only be given in writing and if and when an extension is given it will be given to all parties interested in that tender. But don't ever bank on an extension to a deadline—they are very rare.

Many tender processes will have information sessions available to potential applicants in advance of the tender process commencing. You should attend these if they are offered as it gives the opportunity to meet the public servants involved and judge the likely competitors, it may also give you the opportunity to join other tenderers as a sub contractor or a partner in a bid.

Eight Steps to Tender Writing

1. Know what they want

Know what it is the government is tendering for. This seems simple enough but there are plenty of examples of tenderers getting it wrong or missing important points.

All the information you need will be included in the tender documents and also from any information sessions..

Checkout government websites for further information on the program or services which are being tendered for, and for any recent publications or press releases which refer to the government's intention and why the tender process is being conducted.

A Minister's website is also worth visiting for the latest press release and speeches. Quoting a speech from a minister is often a good way of proving to the assessors that you have done your research and know what they want. .

It is important to understand what the problem or need, looks like in the region or area for which the organisation is seeking to tender. For example, local demographic information and an understanding of what services and infrastructure are already in place, or needed to provide the service. Understand where the gaps in service delivery are in that area, and what the barriers to that service delivery might be.

2. Identify funding limits

Be aware of the funding levels which apply to the tender process. Different rates of funding often apply to different levels of service which are provided, and for different client groups. For example, the delivery of a regional or remote service may attract a different funding level to cover travel costs which would be over and above those of a metropolitan area.

Consider the period of funding. Is it an annually renewable process, or paid on completion of specific tasks or meeting of set targets?

3. Review guidelines and assessment criteria

A number of important issues should be considered:

- Are you eligible to apply?
- Can you satisfy all the criteria?
- Can you meet the deadline for the tender process?
- Realistically, what are your chances of success?

4. Talk to the funding agency

There are generally only two options to discuss any aspects of the application process with the Funding Agency. The first is to do so at the Agency-conducted information sessions which are conducted prior to the tender process, and, the second, by contacting the information contact numbers which are provided in the tender application pack.

Strict protocols apply to public servants during tender processes, and they are not permitted to talk with potential applicants for tendering processes, outside of the prescribed process contained in the information packages.

5. Develop a plan for writing and submitting the proposal

One of the mistakes that can be made is not to have a plan for writing and submitting a tender. It is a project of its own and needs to be treated that way.

Develop a check list based on the information pack and assessment criteria.

Identify the necessary tasks and draw up a timetable which allows for information gathering, writing, and clearance, and sign off by any relevant committees, managers or Board. Tasks may include: Complete first draft, review draft, lodge tender, develop budget, review budget, attend briefing session, debrief manager/management committee, meet subcontractors, proof read, etc

Include reminders to back up copies of the tender. It is almost impossible to rewrite a tender if it is lost. Power surges, clumsy fingers, nosy children and the classic “unknown causes” can lose all that you have written, so backing up and even copying onto a disk or thumb drive is prudent, especially for the very large tenders.

Writing plan will also help determine whether there is sufficient time to write and submit the proposal to meet the close of the tender process.

Tender Submission Plan (example)

Task	Due date	Activity/notes/ who will write this	Completed

6. Write the tender

Key things to remember:

- Address each selection criterion
- Stay within the word limits provided.

In answering the selection criteria, consider each criterion as a separate stand alone submission. Identify what it is that is being sought, and provide details of your experience, or experience with similar projects and the evidence of successful outcomes or services that were delivered.

Use words in your application process which match what is being sought/needed. This can include words in the selection criteria, or words that the Minister has used in press releases, or similar in the tender information package.

Evidence supporting an application may be drawn from such sources as:

- Numbers, outcomes or targets met from previous projects;
- supporting data, such as statistics and other relevant quantitative information;
- information on key personnel and their experience;
- Relevant media releases, personal testimonies, or awards received.

And before you start writing, always remember there is a person or persons assessing what you write. They will have a checklist and their own objectives.

Keep the selection criteria handy, up on a notice board, on a whiteboard, somewhere that is easy to see and always in your face. It is very easy to go off on the wrong tangent and write information that is not necessary or irrelevant and will be deleted by you at a later stage. Don't waste time on, irrelevant information.

Goals and objectives

- Describe what will be done
- Describe measurable outcomes
- Reference back to the tender documents

Methodology or Project Plan

This is basically your project plan. It can be simple or complicated depending upon the tender, but it is necessary. A poor methodology will make it difficult to get the tender. If you are not confident about writing a project plan then buy some books or do a training course or use the expertise of someone who knows how to complete a good plan, or become part of someone else's tender. A good plan will consist of: Who, When, Where, What, How and should be in stages if possible. It will also have a project timeline and key milestones and deadlines. A good project plan will also be linked to a budget and to a payment schedule. It will have obvious outcomes that are exactly the same outcomes from the tender document.

Evaluation

How will YOU know that you have achieved what you aimed for? Too often we wait for the public sector to tell us if we have failed or been successful, or to develop an evaluation process and criteria for us to follow. If possible, be in control of the evaluation so that you do not have unreasonable demands placed upon the tender.

Also include criteria for success of the activity—what do you need to have in place to make sure all will be good, for example mobilisation payment from the tenderer.

Budget

Most tenders from smaller businesses have a tendency to underestimate the costs involved. Big businesses have a tendency to overestimate (as well as screw down their smaller contractors—but that is another issue).

Spend time developing your own budget before you attempt to meet the requirements of the tender. Make sure you can make a profit before proceeding. There are many examples of businesses rejecting a tender offer after they redo their budget and work out they would have made a loss. Worse again are the businesses who discover half way

through a project that they made mistakes in their budgeting and planning and they either make a loss or spend a lot of time pleading with the tenderer to increase the budget.

Develop your own checklist.

Don't miss anything—get assistance in developing the budget and have someone check calculations and assumptions.

Make sure you know what are the allowable costs. Some tenders will allow for time spent in developing tenders, most don't. Some will pay a certain rate for travel that is lower than yours or will demand you use certain equipment and software which may create an extra expense that you need to consider.

Are there any indirect costs you may have missed? Believe it or not, some people still forget to include superannuation in wages calculations and travel costs where necessary. Checking and rechecking of a budget is essential risk management.

Addressing the Assessment Criteria

This is essential. The greatest single reason why people miss out is that they fail to address all the selection criteria. They either miss a heading altogether or they just fail to address the actual issues in the criteria.

If a pro forma is not provided, then use the main criteria as headings and address each one—very similar to a job application

This is the opportunity to sell you, your organisation, your skills and experience and your people.

Information on key personnel

If possible, spell out the role of each person involved in the process—eg project manager, focus group facilitator, OH&S officer, report writing for the final report, financial expert etc. If you are the only person involved, still make sure that the assessors know exactly what YOU will do.

Tenders will often ask for CVs of the people involved. Try and keep this to two pages and ensure that relevant qualifications and experience are included.

Proving your ability and knowledge

In the actual response, use as many examples as you can to show your experience and knowledge. Examples of problems that you solved, difficulties you overcame or exceptional results you achieved should all be mentioned—don't be shy!

You will be asked for referees and previous clients for similar activity. Make sure that these people are aware that you have named them and what the project is about.

Examples are the best way to show your skills and experience and for most people they are also the easiest part of a tender to write.

Writing style

Make it easy for the assessor—try to imagine you are at the other end assessing what you write or imagine a friend or someone you know in the public service and write it for them.

Keep it simple—wherever possible have no long paragraphs. The exception to this is often for technical information where a paragraph may need to be long due to the nature of what is being explained.

Don't be too worried about repetition—if you use the same example several times, that is fine, just make sure that the point you are trying to make is highlighted in each criterion.

Keep the formatting uncomplicated. Don't make the page too messy. Include Page numbers at all times and where possible use headers and footers, and dot points. Make it easy on the eyes of the assessor.

More and more tenders use templates with word limits and no capacity for fancy formatting. This is good, as you know the limit to what you can do and everybody else has the same limitation.

Being prepared

The best way to manage the stress and worry associated with tenders is to be prepared.

Have old tender documents ready for cutting and pasting.

Have CVs and resumes ready and try to update them regularly.

Have prior approval from management and boards if necessary.

If you use sub-contractors, or have other staff involved, make sure they keep their information up to date and use their skills and time as best they can during the actual tender writing process.

If you miss out—find out why and you will be better prepared for the next tender.

7. Review the proposal

Allow time for the proposal to be edited, proof read and critiqued by a third party. Don't miss out on a tender because you left out some simple but essential information.

8. Submit the proposal

This seems easy enough but plenty of people get it wrong—whatever you do, get the tender in on time, if it is late it will not be considered unless you are very lucky or have an amazing excuse.

Check the information package on when, where and how to submit. Make sure this information is written in your plan for the tender.

Check on how many copies are to be provided, and keep a copy of the application for yourself. It is best to keep a hard copy as well as electronic copies. Save a copy to a disk somewhere.

If sending by post, allow time for delivery, and organise a receipt.

If submitting by email, ensure a receipt of application is received.