



Hints and tips for the tender process

- The tender document with supplier's responses will provide the centrepiece of the resulting contract – so make sure you construct a comprehensive set of requirements covering every element of the contract.
- Remember that you've also got to be able to evaluate (and score) bids – you need to elicit responses that can be assessed in a demonstrably objective and transparent fashion.
- You should think carefully about how your requirements drive suppliers to construct their responses – because you'll have to be able to use the information to put the contract together. Be precise - woolly wording in requirements may result in vague responses which are difficult to evaluate and unsuitable as the basis for contractual commitments
- Look at the draft contract schedules within the Framework Agreement as an aid to help you produce a comprehensive statement of requirement
- Remember that a contract isn't a necessary evil – it's your guarantee that you get what you expect to the standard you expect. If it's not documented in the contract then at best you're at risk of not getting it, so have an eye on what you will need for a comprehensive contract while putting your requirements together.
- You could issue a draft order form with your ITT – maybe use that as a discipline to make sure you think ahead to constructing your contract. Make sure the draft order shows how the ITT and winning tender will be used to construct the contract. In fact, it may be beneficial to issue a draft contract with the ITT, with both documents clearly cross-referenced as appropriate, the draft contract completed as fully as possible and showing how the ITT responses will fit into the schedules
- A clear format for the statement of requirements counts for a lot:
 - Take time to carefully plan your tender document
 - Divide your complete requirement set into logical subdivisions
 - Split each subdivision into clear, succinct, and (as far as possible) precise requirements
 - Reference the content logically and clearly
- The provision of the necessary functionality to the required levels of performance and in a reliable, secure manner is always the centrepiece of an ICT solutions requirement but in your statement of requirement don't neglect:
 - The essential background to you as a customer:
 - Who are you?
 - What do you do?

Where have you come from and where are you going?

- The essential background to the project :
 - details of your relevant business operations
 - why you need to change with this procurement as the vehicle
 - what are the key business targets that this project will let you achieve
- The instructions to bidders:
 - Structure and content of bids – the clearer your instructions the easier the task of evaluation and contract construction will be
 - What form for bids – hard copy? Electronic? Both?
 - What procedures for submission?
 - Timescales - deadline for any questions and date for final submission
 - Contact details
- Help with construction of bids:
 - Evaluation criteria – have to be transparent so tell potential bidders the criteria, any sub-criteria and the associated weightings. Be clear on how the tenders will be scored
 - Contact point for questions
- Don't be afraid of talking to the suppliers before you start your procurement. Yes, it has to be fair and non-discriminatory, and you mustn't allow it to distort the subsequent competition, but you can avoid a lot of frustration if you sound suppliers out early as to whether your ideas are technically or commercially viable.

Make sure you aren't seen to be favouring certain suppliers – be inclusive, but take advantage of the scope to tap into suppliers' perspectives before you enter the formal procurement process with all its restrictions on dialogue with bidders.
- Once you start your formal procurement process by issuing the invitation to tender, be prepared to answer supplier questions on your requirement. No matter how clear your specification, there always seem to be clarification questions. Factor this into your resource planning – it's an investment (not an overhead) as the quality of bids may suffer in the absence of clarity or suppositions.

Some suppliers may even be dissuaded from bidding if they get the impression the customer is not fully committed to an effective procurement process. You may choose to hold a supplier day at which the customer team gives a presentation on the project to interested suppliers. This may give you the chance to deal with any common questions or misunderstandings easily. In any event, once the procurement has begun and points are raised for clarification you should ensure that all necessary information is available to all interested suppliers. This is normally achieved by publishing all responses to all suppliers, removing the identity of the questioner.
- Manage the evaluation process fairly and rigorously. Make sure that you have enough staff resource with the right skills to carry out the assessment of bids. Make sure they are all thoroughly briefed on the manner in which the evaluation is to be conducted and that they all approach the task in the same manner – that they have

the same understanding of how the scoring system works, and all know what they should be looking for when addressing specific responses for specific requirements.

Ensure that any questions raised by evaluators during the evaluation process are all directed to one person assigned to oversee the process – don't let evaluators "sort it out amongst themselves" as this may result in one of the basic principles of evaluation being infringed - "do what you told suppliers you'd do in the way you told them you'd do it". Above all, make sure the evaluation process is thoroughly documented (and records are kept) to demonstrate your adherence to this principle.

- At the conclusion of the project be meticulous in informing all participating suppliers of the outcome. Remember that if your procurement results in a contract with a value exceeding the threshold for application of the EU procurement rules you need to choose whether you implement a standstill period before awarding the contract. Under the terms of the Framework Agreement a standstill period is not mandatory but it is good practice for any significant procurement.

If unsuccessful suppliers ask for a debriefing on their bid you should offer them one – it's good practice as well as an obligation where the EU procurement rules apply. It will help the suppliers with future bids and help you to build a reputation for professionalism in your procurement activities.

For further advice on the tender process, please contact our central e-mail address, which is CG.Communications@education.gsi.gov.uk or schools.ictsupport@education.gsi.gov.uk