



Activity: Checklist – Should you tender?

Health Warning: Think carefully about whether to tender for any given piece of work. Do not rush into it just because you are afraid of missing out on opportunities.

A Before completing the checklist you will need to carry out the following work:

- Read through the invitation to tender and extract all requirements under the following headings: service delivery requirements, staffing and skills requirements, reporting requirements, infrastructure support requirements, financial investments required and accreditations desired.

B Once you have the above details, complete the following checklist:

| | ✓ | ✗ |
|--|---|---|
| Mission | | |
| • Does the work fit in with your organisation's mission, aims and objectives? | | |
| • Do your service users identify with the work? | | |
| • Will you have to invest less in other projects in order to deliver the contract? | | |
| • Have the implications of this been thought through? | | |
| • Does the piece of work fit with your business plan and strategy? | | |
| • Do your governing documents (e.g. your Memorandum and Articles of Association) allow you to undertake this work? | | |
| • Will it enhance or detract from other areas of your work? | | |
| Collaboration | | |
| • Do you have strong partnerships in place that will help, rather than hinder, your delivery? | | |

Capacity

- Do you have the capacity to deliver the work?
- Do you have enough staff?
- Will you be able to recruit the staff you need?
- Can your management structures absorb the extra work if you need to bring in more staff?
- Do you have, or can you develop, the capacity and infrastructure to deliver the service?
- Will you be able to deliver *exactly* what is specified in the contract, within the specified timeframe for the stated amount of money?
- Can you give the procurer all of the information asked for, including evidence of policies, management and governance structures and evidenced track record?
- Do you have the time and skills needed to invest in writing a successful tender?

Trustees

- Do your trustees understand the work?
- Do they understand the risks involved with taking on the work?
- Have they agreed that it makes sense for the organisation to take on this work?

Legality

- Is the proposed contract permissible within your constitution?
- If not, can it be done under a trading subsidiary? (You can find guidance on trading at www.ncvo-vol.org.uk/sfp/?id=2114)

TUPE

TUPE is regulation that protects the terms and conditions of employees who must be transferred in the event of a change in contract holder for an ongoing service. See page 46 for more.

- Do you know if TUPE applies if you win the contract?
- Do you know what the risks are associated with TUPE?
- Will you be able to take on all of the TUPE conditions?

Is it a good opportunity?

- Is it possible to deliver a high quality service for the money specified in the tender?
- Are you sure about the meanings of all the terms used? Do you need to clarify anything with the procurer?
- What do you know about the particular commissioner? Do you want to provide a service for them? Do you have relevant experience in the client group, geography and type of work?
- Are all the clauses in the proposed contract acceptable to your organisation, are there any opportunities to renegotiate any of the terms?
- Is the time that will be spent in submitting a tender worth it? Consider the contract value, the overall value to your organisation, and your likelihood of winning the contract.