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Partnership and Procurement Project

Bidding checklist

If you intend bidding for contracts to deliver public services you are recommended to read the guidance provided by the Charity Commission. Any areas requiring clarification should be followed up with the Commission:

Charities and Public Service Delivery CC37 - www.charity-commission.gov.uk/publications/cc37.aspx

If you are actively interested in bidding for contracts you will need to find out where suitable tenders are advertised (e.g. relevant websites etc.)

This checklist identifies some of the things you may need to have in place prior to bidding. Where you are bidding to run specialist services there may be additional requirements. You are recommended to assess your organisation against this checklist before the tendering process to ensure that you have adequate time to address any gaps.

If you are working in partnership to submit a bid, there will be additional factors to consider.

Context

- Do you know which organisations are delivering similar services in your area?
- Are you aware of local strategic priorities and how these relate to you (e.g. Haringey Strategic Partnership and the Local Area Agreement)?
- Are you familiar with the local priorities for your area of service delivery (e.g. children's services)?
- Is your organisation known to the statutory organisations commissioning services?

Organisation

- Are you a legal entity (e.g. company limited) and able to enter into contracts?
- Does your governance document (constitution) permit you to deliver services?
- Do you have the right trustees to oversee this development (e.g. set of skills)?
- Do you have 2/3 years annual reports and audited/examined accounts?
- Do you have a business plan?
- Do you have an organisational chart?
- Do you have CVs/biographies of trustees/directors and staff?
- Do you have a budget for organisation (including sufficient cashflow to deliver service)?
- Are you a quality-assured organisation (e.g. PQASSO, IIP)?

Policies and procedures (n.b. are they current?)

- Child protection (if required)
- Complaints
- Data protection/freedom of information
- Environmental
- Employment (e.g. staff handbook)
- Equal Opportunity and Diversity
- Health and Safety
- Insurance (public, employers, professional indemnity)
- Risk assessment
- Safeguarding (if required)

Capacity

- Have you identified 'spare' capacity to invest in bidding (staff time, expertise etc.)?
- Do you have evidence of having successfully delivered previous contracts?
- Can you provide referees for the work of your organisation?
- Does the organisation have the ICT required to bid and deliver services?
- Can your organisation demonstrate it has the capacity to deliver a contract?
- Do you have a business continuity plan?

Further information

Children England

www.childrenengland.org.uk/index.php?pageID=750

Although designed for those providing children's services, this website contains information of value to all service providers

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