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Proving your point

A GUIDE TO CREATING A TENDER KNOWLEDGE BANK

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HOW TO *PROVE* YOUR BID IS THE BEST OFFER FOR THE BUYER

Recently the team at Mercury was asked to review a bid that a client had written. It was a market the client knew well, and the type of service they already deliver. They had a sound service model and some good, innovative ideas.

But there was one thing wrong – nowhere in the bid had they given any *proof* that they could do what they said they could.

Unfortunately, this wasn't the first time we'd had to cry "*but where is the evidence?*" And what followed was a very hectic and fraught 10 days as we all tried to gather information to substantiate the bid.

But it doesn't have to be like this.

If your organisation spends some time building and maintaining a knowledge bank, you will have easy access to back up your bid, and your (bidding) life will be much easier.

BUT WE'RE NOT DELIVERING THIS SERVICE YET, HOW CAN WE PROVIDE EVIDENCE THAT WE CAN DELIVER IT?

Awarding services to providers is a risky business for commissioners. They need to pick the provider that offers value for money, a compliant and effective service, who will reach the expected standards of performance. They don't want any nasty surprises; they need to be convinced that you will deliver what you're supposed to.

Commissioners will be attracted by the features and benefits that you outline in your bid, but they will only breathe a sigh of relief if you provide *proof* that you can deliver.

You need to provide evidence from both previous and existing services that demonstrates your capability to provide the service you are bidding for.

Building up a knowledge bank of evidence takes time, so it's best to do this in advance of the Invitation to Tender (ITT) being published.

If you establish a comprehensive knowledge bank for your organisation, with a way of keeping it updated, you have access to up to date evidence whenever you are bidding.

The result? The whole bid process is much less fraught. Your chances of winning the tender will increase.

Interested? Then read on!

WHAT SORT OF EVIDENCE DO WE NEED TO COLLECT?

Our experience is that evidence in the following key areas covers most health and social care bids:

- Corporate background
- Past performance
- Audit data
- Quality processes
- Information relating to service users
- Staff details
- Partnership working and stakeholder engagement

These are examples of the type of evidence you need to collect under each of these headings:

CORPORATE BACKGROUND

- Organisational structure that shows who the service will report to and how this will ensure that the service delivered on the ground will be high quality, safe, and accountable
- Mission statement and values, and how living your values results in changes to your day to day practice and how this will benefit the service being procured
- Any awards, certificates or appraisals you hold, and why these are important
- Organisational memberships and the benefits these provide
- Inspection reports are a good source of evidence if the comments from inspectors demonstrate that you've gone above the minimum standards
- Key personnel can be a positive discriminator if you can present their experience and knowledge in the right way, so up to date CVs showing experience and skills are important
- The person evaluating the bid cannot take into account any previous knowledge they have about your organisation. So it's important to have a concise history and overview of your organisation that you can use to give the evaluator a picture of the size and scope of your operation
- If you can benchmark your service delivery against national standards, then this adds another dimension to the statistics you can quote about your performance
- Easy access to your policies and processes is important, especially for pre-qualification. Make sure that you have a process of reviewing and updating your policies, so that they reflect changes in best practice, legislative changes, and organisational changes. They need to be dated and signed
- Make sure that your policies are backed up with organisational processes and systems. For example, your health and safety policy should link with a robust system of risk assessments and risk management processes
- You should have easy access to a list of important reference numbers such as your company registration number, charity and VAT numbers, and your registration with the Information Commissioners' Office
- Your sustainability credentials are increasingly requested in bids. Do you record details of what you have done to reduce your carbon footprint, and the impact this has had?
- What activities do you undertake to demonstrate your Corporate Social Responsibility? Do you buy your goods and service locally? Employ local staff? Support local charities?

Corporate information is important to demonstrate that your organisational systems are robust and updated regularly, either because of legislative changes or lessons learned. But it's not enough to say that you have systems in place, you must be able to back these up with evidence, and also place them in context to show that you can offer more than your competitors.

PAST PERFORMANCE

- Details of the services you deliver, their size, contract value, number of service users, numbers and grades of staff, geographical coverage, population size and population demographics
- Performance against KPIs, any cost savings you've made and incentives you've earned
- An analysis of how you've achieved exceptional results
- What you have done when results have fallen short of expectations, and how you will ensure 'lessons learned' are carried forward into this new service

Have a system in place to share performance data from services with your business development team. Where you have particularly good data, analyse what it is you do that makes your performance so good. And use poor performance positively to demonstrate that you work proactively with commissioners to resolve anything that goes wrong, as quickly as possible. This will help to reassure commissioners that they can trust you to deliver a good service.

AUDIT DATA

- A description of the range of audits you carry out and how you do them. Who does them, what tools and processes you use, who is responsible for ensuring they happen, and how your senior team monitors and acts on audit information
- An analysis of the data. What does it demonstrate about your practice, and how does this relate to the specification of the service that you're bidding for?
- An explanation of how you've achieved really good results, especially if you've achieved them through innovative means
- Any specific achievements, such as winning an award, or developing good practice that has been adopted by other areas. This tells a really positive story

You need to have systems in place to share your audit data with the team producing your bid response. Analyse the data so that you can demonstrate what you've done to achieve good results, and how this relates to the service that is being tendered.

QUALITY PROCESSES

- You should be able to describe a documented quality assurance process, preferably externally accredited and audited
- The process will describe how you set targets, how you measure progress against those targets and how you report on progress
- Your description needs to include who does what, how they do it and how often
- You also need to explain who reviews the outcomes, and decides to take action where it is needed, and how these actions are monitored
- You should also describe your continuous improvement process
- Statistics alone do not tell the full story; you need to also describe how the systems you have in place have directly led to improved quality in service delivery

A quality management process is a set of procedures that you follow to ensure that your service is 'fit for purpose'. You will set targets (such as KPIs) with your commissioner, and you may also want to set your own internal targets. You then implement a quality assurance and quality control process to measure and report the actual quality of the service you deliver. Part of the process is to identify any quality issues and resolve them as soon as possible.

INFORMATION RELATED TO SERVICE USERS

- You should gather service user (and carer) data relating to two main areas: *involvement and engagement*, and *service user experience*
- With an increasing focus on person-centred services, it is important that you have good systems in place to involve service users in the development and ongoing running of your services. This includes everything from decisions about their own care, to being involved in monitoring your services and ensuring that there is a continuous improvement plan in place
- Whatever systems you use to involve service users, make sure you capture the outcomes, and also ask service users how they feel about the involvement they've had and whether it works for them
- There is a lot of material that you can collect to measure your service users' experience of your services. Some ideas include patient outcome data, safeguarding issues and their resolution, complaints, comments, testimonials, outcomes from service user surveys and the 'Friends and Family' test
- Case studies can bring a bid to life if they are used carefully. They must illustrate the point that you're trying to make. Case studies should include some background information, i.e. what the problem was,

what the service did to help resolve the problem, and what the outcome was. By using this outline, you can show a lot in a very few words

Service user and carer data is vital to provide evidence for your capabilities in service delivery. Collect data regularly, interpret it, and use it to provide evidence for the points that you're making within your bid.

STAFF DETAILS

- Full details of your recruitment processes should include how you train your interviewers, the pre-employment checks that you carry out and *how* these processes ensure that you end up with safe, competent staff
- Useful statistics relating to recruitment include the number of vacancies that you have, the average time you take to fill different positions, which recruitment methods you use, the number of recruiters you have and your sources of recruitment
- Commissioners will want reassurance that you'll be able to mobilise the service on time. You need to describe your mobilisation team, and their experience in mobilising similar services. Also the approach you'll take to project management, how you'll measure progress and what you'll do if mobilisation plans 'slip'
- If you have to transfer existing staff into the service, you'll need to describe your experience of TUPE (Transfer of Undertakings [Protection of Employment] Regulations). If you have previously transferred in staff, how many have remained with your organisation? You also need to say how you'll obtain guidance about the legal process, and who will provide this
- Other useful staff-related information includes your supervision and appraisal processes, opportunities for continuing professional development, induction and mandatory training, and staff surveys

Staff are one of the most vital components in good service delivery, so you need to demonstrate that you can attract and retain skilled and committed staff, and support them to deliver good services. There are often whole sections in a bid on staffing, simply because it is so important. Having good quality information available will help you to craft compelling answers and prove you have the organisational capability to provide an effective staff team.

PARTNERSHIP WORKING AND STAKEHOLDER ENGAGEMENT

Tender questions about joint working and stakeholder engagement are often the most difficult to answer clearly. You need to have a good plan for stakeholder engagement. This should outline who you will engage with, how you'll engage with them, the purpose of that engagement, who will do it (this should be someone fairly senior), and how you will monitor and measure success. You should describe engagement during mobilisation and on an ongoing basis, once you start delivering the service.

- To back up your plan, you should gather examples of good joint working from existing services. describe what you did, and what the outcome was, for example did joint working provide efficiencies or lead to improved outcomes for service users?
- Think about the service user pathway and where there might be weak points that joint working can address, e.g. can you 'signpost' service users onto another service for specialist or ongoing support following discharge?

WHAT DO I DO WITH THE EVIDENCE ONCE I'VE COLLECTED IT?

Producing a tender document is always time-limited and stressful. Gathering the evidence we have described will help you to back up your service solution with evidence of your capability to provide the service. But for this information to be useful, it needs to be accessible, and that means having a good system of storage and a method of updating the information. You need to develop some form of knowledge bank.

This really needs to be someone's job, otherwise it won't be a priority and probably won't happen. If you can appoint a coordinator, and then allocate specific updating tasks to other people, then that will usually be sufficient.

We have seen lots of different storage methods for knowledge banks, and these vary depending on the complexity and size of the organisation.

There are a range of software options that you can buy, designed specifically to store evidence for bids. Most companies are willing to give you a free demonstration of the software, and you will need to decide if the cost is justified depending on the number of bids that you do each year. You may also need to consider if they will work with your existing technology systems.

Alternatively, business development support companies, such as Mercury, will come into your organisation and help you establish a knowledge bank, as a one-off project. In this way, it is tailored exactly to your company and how you will use it.

SUMMARY

By building up a knowledge bank of evidence, you can pepper your bid with proof points that assure evaluators that the features and benefits that you claim within your bid are real, verifiable and achievable. This reduces your risk as a provider, and makes your bid more interesting and compelling.

You should build up your knowledge bank when you're not involved in a bidding process, and keep it updated through lessons learned, and as you gather up to date evidence on your service performance. After each bid process, you should ask for feedback from commissioners, whether you win or lose. Ask them which proof points were most compelling, and gather more of this type of evidence within your knowledge bank.

WANT TO LEARN MORE?

If you want to find out more about establishing a knowledge bank, why not take our course on *'Proving your point – collecting persuasive evidence for your bid'*. This is an online course so you can study in your own time. We also offer the course with an additional coaching package. For more details, click [here](#).