Competitive Compassion

Providing helpful feedback for bid drafts

So, you've been asked to review and provide feedback on a draft of your charity's bid. Great stuff – this is a crucial role, making sure that you get the most out of internal expertise, that the right people are happy with what your bid commits your charity to, and that the bids that you submit are at the highest quality. Regular reviews across a bid's development should be factored into all bid plans, but actually doing so effectively can be daunting.

This is a practical resource to have alongside you as you undertake this vital task.

Before you start….

Think <u>internal</u> first. Reviewing a draft is part of a process towards creating the best quality bid and how you manage it will have a knock-on effect.

Always check your role within the process. A review could achieve any/all of the below:

- provide the writer with an understanding of whether they are matching core needs of the bid
- identify areas where improvements could be made to the structure and content
- check that the content accurately matches the internally agreed service model and the organisational capability and methodology that underpin it
- suggest how to reduce to appropriate word count
- give a final check for consistency, grammar, spelling and format

Every written response should have all of these checks at some stage, but how these are divided between reviews will reflect the stage within the process and the needs for your individual expertise and time. The expectations for each review should be laid out in advance and you will need to be clear and consistent to your review's intended purpose, else you may miss something necessary or lose time duplicating someone else's work.

Things I like to try:

- Discuss with the bid's writer in advance to *clarify:* what your review's intended purpose is (and isn't), their time available for re-drafting in response to your feedback, their level of experience as a writer, and their personal preference for how feedback should be presented. Based on this, *agree the feedback format* e.g. whether it will be given in a meeting, in comments on the text, in a summary email or by making direct amendments to text.
- Check or discuss your *bid strategy* for an indication of what scoring you are aiming for, taking into account weighting for responses and strengths and weaknesses against competitors

Then, think <u>external</u> – as a member of the charity sector workforce, this is likely to be a bid about an organisation and cause that you care a lot about. This makes it all the more important to deliberately factor in steps to get into an external mindset. Good feedback is about taking the commissioners' perspective.

Things I like to try:

- *Re-read the specification* as well as other key content such as market engagement materials that reflect the commissioners' language and priorities. Imagine you were writing them – why would you have made the wording decisions that you have? What mindset are they in? What are their priorities?
- *Channel them personally* – if you haven't met them, talk to someone who has. Understand what they think about service, and their key priorities such as value for money, their own personal involvement in delivery and worries such as rising demand. Jot these down as some key thoughts that will be at the front of their mind, ready to keep referring to these as you review

Check the question and scoring

Whatever the commissioner's personal priorities, the bid will ultimately be scored based on the evaluation criteria that they have established.

Things I like to try:

Spend several minutes focused only on the question. Read it out loud and consider emphasis and choice of words. Highlight key words. Narrow it down to the core question being asked and write that out separately. *Consider* the scope, e.g. is the question referencing the whole service or a specific area, and the level of detail it is after. If it is complex, try writing out what is the core question being asked is.

Starting your review

The first read – understanding what stage the draft is at

A first read is to give the question a once over to understand what stage the question is at and whether this matches your discussion with the writer. A quick initial read before you focus will give you an initial sense of whether the question is answered and what level of word count change your review needs to take into account.

The second read - checking against specification

A meaningful review needs a strong understanding of the specification. If you have not read it yet as part of the process, then you will need to take the time to do so first. Even if you have already read it, you will need to return to it with the draft content in mind.

Things I like to try:

- Go through the specification and pull out relevant areas that align with the needs of the question, listing them in a separate document as bullet points. Highlight key language and phrases that are repeated.
- Then, note wider values that are emphasised across the specification which may relate indirectly to the approach that must be reflected in the question e.g. expectations around of service user involvement, collaboration with other organisations etc. Write these themes into a secondary list
- Write a brief summary of what role the commissioner is indicating that they want the provider to play – try reading between the lines and looking for the verbs. Are they after a driver of quality within an ecosystem? A peer collaborator? An innovator? A functional provider that checks decisions with the authority?

Your second read can review against these, checking:

- Does the response fully address the key points?
- Do you lay out a clear understanding of the commissioners' expectations of the organisation's role, approach and delivery?
- Does any content contradict or undermine the commissioner's expectations?
- Are there any gaps?

The more specific the specification's references are to individual actions, the more essential it is to include a clear reference in your response e.g. where they require specific reporting standards, alignment with specific processes. Where the specification is broader, such as referring to an *approach or a role*, they will want to see a clear understanding of these expectations and some initiative to address them in your service proposal.

(Of course, hopefully you have spotted these areas and addressed them at service design stage. However, a review can be a helpful chance to spot gaps that have not been considered in the service model, or where the subsequent content does not point out the hard work you have done incorporating it).

Your feedback should highlight any areas where the response is falling short with clear reference to the commissioners' expectations. Constructive suggestions should give an opinion on whether this a content issue (i.e., one that the writer can address themselves in a new draft), or a prompt for decision-making at design level, such as a significant deviance from commissioner expectations.

Third read - checking for quality and clarity of written response

I find the simplest way to do this is to consider the response in terms of a balance of content that states:

- this is what we are going to do
- this is why we are doing it like this
- this is how it will work in practice and how we will ensure it is delivered effectively

All responses should include an element of each for the key points in the question, and anything that does not match the above should be considered for removal.

Things I like to try: Go back to the question. Establish what you think the ideal balance from the question calls for in terms of "what", "how" and "why" – for example one focussed on approach should have emphasis on the "how." Then, pick a highlight colour for what, how and why and highlight the different sections of the response that are used for this. Compare the two.

As well as checking that the balance is right, separating out content by its purpose will help you focus your review on whether this content is achieving its intentions.

What to check when reviewing the "what" content

"What" content will include actions taken, what is automated / done manually, what channels are used (digital, face-to-face etc) and timescales.
For this, your review can consider:

- *Detail* - are the actions described with enough detail that commissioner can clearly see what is happening and get a sense of time and effort needed?
- *Credibility* – do the actions read as realistic and proportional to the value of the contract and the size of the service's workforce?
- *Service users* – does it acknowledge different service user needs, and make realistic assumptions about what will be effective for them?
- *Flow* – does one action clearly follow on from another?
- *Voice* – is it falling into the trap of the "passive voice" i.e. talking about things being done rather than people doing them?
- *Gaps* – is anything obvious missing? It's far too easy to talk up your processes without laying out what you will actually do!

What to check for the "how"

"How" is the mechanics - the structure and process that you are putting in place to ensure things happen. This should always include responsibility (to ensure it happens); a policy, procedure, framework or other system (to ensure it's consistent) and the method/approach that underpins it.

For this, your review can consider whether the content needs to acknowledge what of the below to fully address the question and assure the commissioner:

- *monitoring* - how direct work links to continuous improvement/quality? How do you ensure that it is accurate, timely and effective? Who is going to do this? Who are they reporting to?
- *finance* - how your financial and operational management arrangements work to ensure ongoing value for money
- *infrastructure* – how it draws on appropriate experience and footprint
- *tools and processes* – what is used to coordinate a systematic approach? e.g. case management vehicle

- *organisational approach* - how is this work embedded in a wider organisational approach, corporate commitment and governance arrangements
- *culture* - where talking about culture, what mechanisms will ensure that it is both embedded and maintained.
- *values* - how will they underpin engagement? What does that practically mean e.g. how will a service user experience the service in a way that reflects your value commitment?

Things I like to try:
Consider where you are talking about *advantage* – some of your "how" descriptions will differentiate you from how other providers do them. Note what these are from your win themes and whether these are clearly emphasised in the response. Also note where the response talks up anything that your competitors also do – these need to be treated as a "neutraliser" rather than an advantage.

What to check for "why"
This is perhaps the trickiest but and where many bids fall down. Checking for "why" is about being upfront and explicit about the choices you have made, why you have taken them and why they will ultimately benefit the authority. Broadly, the "why" is: why we are different; this is what we can do that other providers cannot; why it will be effective specifically for this service. This must link to a coherent underlying service philosophy, demonstrating your service's distinct role alongside other provision.

For this, your review can consider:
- *rationale* - reasons for decisions to have been made e.g. why elements are delivered by particular partners or in house
- *link to objectives*– how will this benefit the outcomes for the authority
- *design* - what factors have influenced your design decisions
- *benefits* - why the chosen tools are appropriate and effective
- *efficiency* – why choices reflect effective use of resource, management
- *best practice* – where does this relate to known best practice and external standards
- *core competences* - why are you good at these elements and how are you leveraging that expertise? (also part of "how")
- *evidence* – is enough provided? Does the response "tell" what you will do where it would be more meaningful to "show" how this works in other service? Where it is given, is it clearly used to substantiate bid commitments, demonstrate rationale for decisions and/or clearly present you as a reliable provider?

Watch for a response jumping from a "what" commitment to evidence of successful delivery elsewhere - it needs to back up a clear statement of how you will deliver the commitment in the individual service.

Your feedback should note whether the balance between these three areas needs review, and make constructive suggestions on what content could address the balance.

Things I like to try:

- Ask *"so what"* if you think a feature or an advantage is not clearly linked to a benefit or outcome. If there isn't an answer on the page it may need to be added or the content removed
- Consider the "why" sections against the spec points and values. Does the wording clearly speak to what the commissioner considers to be quality? Or, for example, what the organisation prioritises?

Final read: response structure and word count

Your final read should consider if the structure of the response makes it easy for the commissioner to see that their question is being answered and aligns with the word count provided.

Things I like to try:

- If faced with a confusing structure, try stripping out the padding / background to see what you are actually saying and put it into bullet points. Then you can check against the question and your key points from specification, identify any gaps and recommend an appropriate structure
- If text is confused, try inserting a start of sentence that clearly answers the question and check whether content is able to naturally flow. Highlight anything that does not for removal or moving to a separate bit of structure
- Highlight the opening to each section and read each as an independent flow – does it reflect a clear structure?

Helpful feedback could include shifting these into a new structure to move content into. By suggesting clear openings to sections and paragraphs that focus directly on the question and the key benefits of your model to achieve it, you can influence how the next draft clearly reflects this content, leaving the reader in no doubt that you have answered the question.

Getting to word count / what to remove

Regardless of how far you are from word count, a review is a good opportunity to suggest what can be stripped out.

Things I like to try:

Highlight as potential for removal:

- anything that does not match the "what", "how", and "why" structure
- any excessive wordy statements e.g. "for the purpose of"
- every adjective and adverb!
- anything that reads as generic or not developed specifically for this bid
- irrelevant company or sector information

And you're done! Hopefully these exercises have helped you narrow down on some constructive feedback that you can give. Before you heave a sigh of relief and send your notes, sense check it against what you agreed with the writer beforehand – your feedback will have the most impact if it's framed in a way that works for the writer.

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Appendix 1: Checklist

Language and style

Highlight for justification or corrections:

- passive language
- jargon including abbreviations
- unclear sections that need multiple readthroughs to understand
- long sentences
- inconsistency with the specification or other responses. Look for key terms such as references to service users or approaches

Bid and question compliance

- Are all elements of the question clearly addressed and easily identifiable in what they are answering?
- Are all areas of the specification alluded to in the question referenced

Methodology and reassurance to the commissioner

- Does the evidence given relate directly to the work and skills needed, or could it risk feeling tangential or vague?
- Does it read as having enough detail? Are there any big statements that are not then backed up by "how"?
- Is it easy to understand the relationship between the activities described and the outcomes?
- Does the responsibility level and time allocated to tasks feel realistic and proportionate?

Oversight and quality

- Does any area of noted importance to the commissioner have an associated organisational commitment e.g. a policy or procedure to act as a clear, systematic, auditable way of assuring quality? If not, does this need to be added or potentially created?
- Is there a clear line of accountability laid out?
- Is there a sense that issues and opportunities are being anticipated and acted on?
- If something went wrong or standards slipped in the programme, is there a clear sense of how this would be noted and acted on?
- Is there an appropriate emphasis on partnership working, including the relationship with the commissioner and key partners, and clarity on how this would look in practice?

Personnel

- is a clear rationale given for a partnership structure and responsibility split?
- Is there a consistent understanding of which roles will take what responsibility? Are these clearly defined and appropriate to the expected competencies?

Structure

- Is it clear which part of the question each element is answering?
- Is it clear and concise – are there any sections that you need to read a couple of times to get?

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Advantage

- Do the agreed win themes come through? Selling points appropriately emphasised?
- Is added value or notable value for money clearly highlighted as such?
- Does the bid come across as innovative and focussed on creative and continuous improvement?
- Does it speak in terms of a specific organisational approach?