



Please visit [www.actionplanning.co.uk/bids](http://www.actionplanning.co.uk/bids) for dates and locations.

# Preparing successful bids for statutory contracts and grants

**An intensive workshop for a maximum of 18 participants**

Two days of 'hands on' training on how to win more funding from local authorities, central Government and Government agencies



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fundraising, management and recruitment consultants

# preparing successful bids for statutory contracts and grants

## bidding successfully under a new Government

Statutory funding faces unprecedented change as existing programmes are cut, while new opportunities are created by a Government which wishes to redraw the boundaries of the state.

Following the Comprehensive Spending Review, competition for the available contracts and grants is certain to be intense, so organisations will need to be highly skilled in preparing bids which meet commissioners' needs and demonstrate cost-effective delivery of agreed outcomes.

This practical two-day workshop is designed for those organisations making competitive bids for grants and contracts to local authorities, central Government and Government agencies.

The course has been run over 100 times and has been adopted as a core training module by leading service delivering charities including Action for Children.

It provides practical, 'hands on' training for a maximum of just 18 participants and important information on tendering processes and legal frameworks. It also enables you to develop and practise bid-writing skills, with support and feedback.

You will increase your ability to achieve high scoring bids by understanding scoring and evaluation systems and completing high quality applications. We will also help you to improve the profitability of your contracts by building in full cost recovery using models approved by statutory funders.

The workshop looks at ways organisations can develop an effective approach to understanding and meeting the needs of funders and avoiding basic mistakes.

In a recent major procurement exercise 20% of bids were ruled ineligible with nearly half unsuccessful in reaching an acceptable standard (moving to final evaluation).

Practical bid writing skills are developed to ensure that applications use an evidence based approach which demonstrates a track record of deliverability. Areas in which organisations often score badly such as innovation and sustainability are looked at to ensure provide basic pointers.

You will leave with a series of practical resources including the Action Planning 'Bid-preparation tool kit' and a range of handouts to enable you to access support and information services.

The workshop will be led Derek Smith, Statutory Funding Consultant at Action Planning.

Derek was previously Head of Statutory Fundraising and then Director of Services for RNID, which achieved rapid expansion in statutory funding to become one of Britain's leading disability charities and a key partner of Government in the development of services for the hearing impaired.



## feedback from our first 100 workshops

Places on this workshop are in high demand and it has already been run over a hundred times, including customised courses delivered to charities in-house. Participants' comments appear below.

**"I have been on a number of fundraising courses and this was the best. Derek managed to make it interesting and relevant at every point. It was really impressive that the materials provided tied in so well to the presentations."**

*Judith Atkinson, Project Director, KeyRing*

**"The course is excellent. I would recommend to a wide range of fundraisers. It provided exactly what it said it would on the sales leaflet."**

*Ashley Morgan, Finance and Funding Manager, Chester Aid to the Homeless*

**"A superb course. It is so needed for medium sized local voluntary and community organisations. I hope to put it all to good use in the coming months when I submit my tender for a major project."**

*Sue Holmes, Chief Executive, Medway Mediation*

**"An excellent course which I will recommend. Extremely useful in re-affirming what we are already doing, excellent hints on how to do this better. Derek is informative, knowledgeable and interesting. The concrete examples he gave were very useful."**

*Miranda Litchfield, Deputy Chief Executive, Christian Care Association*

**"The exercises where you compare well written and poorly presented bids were particularly valuable."**

*Kelly O'Connor, Recycling Development Manager, Traid*

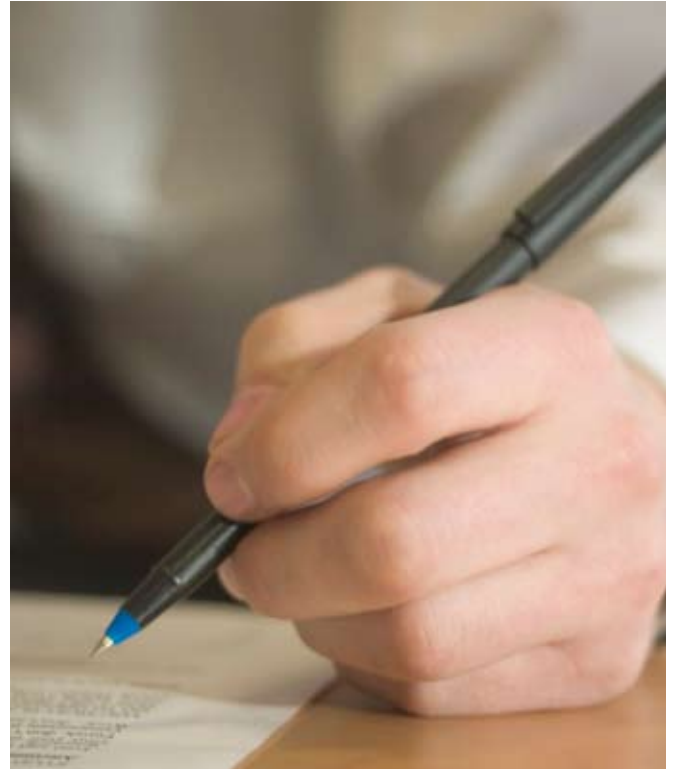
**"This course is simply excellent. I only wish I had done it ten years ago!"**

*Ann Evett, Development Manager, Thomas Pocklington Trust*

## workshop content

This two day, non-residential workshop includes:

- an **overview of statutory funding** and the move to a contract culture
- the key characteristics of **formal tendering processes** of public services and the implications for potential voluntary sector partners
- guidance on how to build and maintaining effective **long term partnerships** with statutory funders
- **briefing on the Freedom of Information Act** and the ways in which this can be used to obtain information which is valuable in the tendering process
- an introduction to the **Action Planning Funding Checklist** which helps organisations to develop a detailed understanding of what the funder is seeking to achieve and adapt their proposition accordingly
- help in developing an **evidence based track record** before you bid, which demonstrates the effectiveness of your services and systems
- briefing on the **evaluation and validation systems** used by the main statutory funders and the presentation of the outputs and outcomes of your programmes.
- practice, during the second day, in **applying the learning from the workshop** to prepare bids which provide succinct responses that meet the scoring criteria and feedback from the workshop tutor to improve performance.



## practical exercises:

- a practical exercise based on a **real life tendering process** for the provision of residential care to young people, from the initial stages of expressing interest.
- practice on how to structure an answer which demonstrates **an understanding of the funder's agenda**
- a demonstration of how you can **build a partnership** which delivers value for money and added value
- an exercise to ensure that when you reach the final stages of the application process that you can make **an effective presentation to a funder**

# REGISTRATION FORM

You can book in four ways:

1. Enter your details online at [www.actionplanning.co.uk/bids](http://www.actionplanning.co.uk/bids) (you will then have a choice of either requesting an invoice, or paying online)
2. or email [anne@actionplanning.co.uk](mailto:anne@actionplanning.co.uk)
3. or fax (020 8770 2090) or post this form to **Action Planning**, Waymark House, 19 Cedar Road, Sutton, Surrey SM2 5DA
4. or phone Anne on 0208 661 8060

Please register the following delegates (**BLOCK CAPITALS PLEASE**)

**1** Mr/Mrs/Miss/Dr: \_\_\_\_\_ First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
E-mail: \_\_\_\_\_

Mr/Mrs/Miss/Dr: \_\_\_\_\_ First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
E-mail: \_\_\_\_\_

**2** Name of Charity/Organisation: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Postcode: \_\_\_\_\_  
Tel: \_\_\_\_\_

**3** Please indicate your preferred workshop date below:  
\_\_\_\_\_

**4** Please tick appropriate box:  
 I enclose my cheque for \_\_\_\_\_ (payable to Action Planning)  
*Attendance fee: £385 per delegate, including VAT, lunch and all presentation materials.*

Please register me/us and send me a VAT invoice. (Unless you specify otherwise, the invoice will be made out to your organisation).

I wish to pay by credit card (complete details below)

Visa  Mastercard  Switch/Maestro  Delta

Card Number

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Valid from \_\_\_\_\_ Expiry Date \_\_\_\_\_

Issue No. \_\_\_\_\_ Security Code \_\_\_\_\_

Switch/Maestro users only

This is the 3 or 4 digit code on the back of your card

**5** Please indicate any special needs or dietary requirements:  
\_\_\_\_\_

**6** Please tick the relevant box if you would like a free discussion with Action Planning about our services in any of the following fields:

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Major Donor Fundraising  | <input type="checkbox"/> Research (e.g. into major donors or trusts)                           | <input type="checkbox"/> Revenue Fundraising |
| <input type="checkbox"/> Recruitment  | <input type="checkbox"/> Strategic Consultancy   | <input type="checkbox"/> Market Research     |
| <input type="checkbox"/> Capital Fundraising<br><small>(Please write below how much you need to raise and for what purpose)</small> | <input type="checkbox"/> Wealth Screening<br><small>to identify potential major donors</small> |  |

#### DATA PROTECTION

We would like to retain your address to send you invitations to future events and information on our work. Should you not wish to receive such communications, please tick here.

We would like to include your name, title and organisation (but not your address) on the delegate list. Should you not wish us to do this, please tick here.

#### CANCELLATION AND REFUND POLICY

All delegate fees must be paid in advance of the conference. Your fee is fully refundable, provided you cancel in writing more than seven working days before the conference. No refunds are available for cancellations within seven working days of the event, though substitutions can be made at any time.

#### PROGRAMME

Action Planning reserves the right to vary the published programme of speakers and the timing of the sessions.



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Attendance fee: £385 per delegate, including VAT, all meeting facilities and materials, lunches and tea/coffee breaks on both days. The workshop is non-residential.

**action**   
**planning**  
let's start from here

Whatever challenges and opportunities your organisation is facing, Action Planning can help with the next stage of your journey.

As a leading UK consultancy to the not-for-profit sector, we have helped hundreds of organisations to raise capital and revenue funding, recruit key people and plan ahead. We work alongside our clients, helping each to make the journey in their own way, and at their own pace.

Our staff have senior-level voluntary sector experience in a range of disciplines and work as a team to deliver practical solutions to client needs.

We provide a combination of advice and 'hands on' implementation for capital appeals, revenue fundraising and bid-writing, research, strategic consultancy and recruitment for senior posts.

Action Planning operates internationally, both in Europe through our membership of EU Consult and in the United States, where we have an associated office in Boston.

We also work closely with ACEVO and key funders to organise the largest UK events for voluntary sector leaders.