

Use External Support

To understand key considerations when commissioning third parties

Before you start

- Assess in detail where you have skills gaps or time issues for addressing a required task.
- Check if there are any existing procedures of your organisation for commissioning external providers.
- Ensure that you have sufficient resources for coordinating and managing external service providers throughout their delivery.

Prior to this step

- M1_1 - Inventory of existing Assets
- M1_2 - Skills Assessment

When considering commissioning and working with external service providers because for example human resources are stretched or your organisation has a lack of experience, a thorough assessment and guidance can be helpful.

This task consists of 3 tables aiming to assist the process of commissioning and managing external service providers.

Table 1 - A template to help you to write an effective call document in order to express clearly what you need and expect from the service provider.

Table 2 - A template to organise the administrative process of commissioning providers.

Table 3 - A template to serve as an example to design your own set of selection criteria in line with your own needs.

What for?

- To think through of what is involved when coordinating the writing of a funding application and how to organise this process.

How to use it?

Table 1

Step 1 Clarify clearly what you need, this is key to write an effective call document.

Step 2 Provide a succinct yet informative summary of the overall plan or project design.

Step 3 Complete each section of the call document provided in the table.

Step 4 Ask an experienced colleague/senior member of staff to review your call text.

Table 2

Step 1 Take note of the names of all the external service providers you seek to contact and/or have submitted a tender.

Step 2 Fill in the checklist in line with developments to ensure you maintain a good overview.

Table 3

Step 1 Use the template to design your own set of selection criteria in line with your needs for assistance.

Step 2 Select a scoring range that suits you and the members of your selection panel.

Step 3 Brief your Selection Panel members about the assessment criteria and the scoring system.

Step 4 Organise a meeting with the selection panel members and compare the assessments and scores. Reach a consensus and select the preferred bidder.

Tool 1 - Some key headings of a call for tenders (template)

1. Scope and description of the call

Introduce your organisation and describe: what is the context for this call for tenders? what services do we want to commission? what specific tasks should to be delivered? where will the service be provided? for how long do we seek support? how much do you plan to spend on the contract?

2. Additional background information

Provide a succinct background and a brief summary of the Action Plan or the planned project, the financial scope of the Action Plan or how big is the project, i.e. what is its cost volume? what type of fund/s are pursued? which partners are involved?

3. Expected outputs and timescale

Describe the expected outputs and timescale for the service delivery (expected milestones, key meeting dates etc.)

4. Expected form and content of the tender

Provide information about the form and content of the tender (how to submit the tender? what documents to submit with the tender? who to contact for any queries? who to send the tender to? when to submit the tender?)

5. Fees

Inform how much are you planning to spend on the contract

6. Contract Management and Collaboration

Describe how will you will manage the contract and what are your expectations are for collaborating with the provider?

7. Tender specifications

Describe who you are looking for to submit a tender? when to submit the tender? what the main legal rules of tendering/contractual arrangement are?

Tool 2 - Checklist for organising the responses and initial selection of external service providers (template)

Name of External Service Provider	Date of Tender opportunity published or sent directly to the provider	Date when the provider has confirmed that they will submit	Date of additional information sent on request	Tender Received (on-time of submission deadline) (tick)	Shortlisted for interview (tick)	Invitation to Interview Sent (date)	Date of Letter of Decline sent	Date of Letter of Acceptance sent	Contact Name of Provider	Contact Address of Provider	Email of Provider	Comment
<i>External Provider A</i>												
<i>External Provider B</i>												
<i>External Provider C</i>												
<i>External Provider D</i>												
<i>External Provider E</i>												

Tool 3 - Assessment Criteria of submitted tender documents (a scoring example)

to be filled in by you

calculated cells

Range of assessment criteria for tenders (example)	Score from 1-5 (1 = poor response and 5= excellent response)	Sum of the Score per Section	Weight (in %)	Weighted Score
1. Meeting the requirements of the call		19	20%	3,8
The tenderer demonstrates a thorough understanding of our needs	4			
The tenderer makes clear reference to relevant policy and strategic context to which the Action Plan/project will need to relate to	3			
The tenderer has outlined some excellent ideas that could enhance our Action Plan/project	3			
The tenderer has an excellent grasp of the context and the funding environment relevant to our Action Plan/project	3			
The tenderer demonstrates an excellent understanding of the specific tasks we have requested in the call.	4			
The tenderer highlights a number of thematic or funding circumstances that can affect the tasks we are requesting	2			
2. Relevant experience		13	50%	6,5
The tenderer has substantial experience in the requested tasks of the call (references are provided)	5			
The tenderer has substantial experience in the thematic area of our Action Plan/project (evidence is provided)	4			
The tenderer has a positive track record for supporting organisations like ours (evidence is provided)	4			
3. Value for money		14	25%	3,5
The tenderer has presented his/her costs in a very transparent and detailed manner	4			
The tenderer has identified his/her day rate/hourly rate in relation to each task specified in the call	5			
The tenderer has clearly stated how many days he/she will allocate and what happens if the work goes over budget	5			
4. Contract delivery and management		10	5%	0,5
The tenderer explains clearly how his/her work with us will be conducted such as methods, approaches to be used for the tasks (i.e. co-writing/appraising, process over time, number of meetings required, etc.)	4			
The tenderer has included a clear timetable and milestones for the services to be provided	4			
The tenderer has addressed the potential risks and how he/she will mitigate/adjust his/her work accordingly (such as illness cover)	2			
Total	56	56	100%	14,30