

## Preparing for the Selection Stage

Following the introduction of the 2015 Public Contracts Regulations in many cases there is no PQQ. However the “selection stage” of tendering still exists and is proving to be more problematic than ever. Many providers are finding that exclusion during appraisal during selection is becoming more frequent as “pass:fail” questions prevail. Moreover as feedback is not required until the intention to award is announced.

Some purchasers will provide minimal information, but legal challenge is almost impossible when this situation arises. Four exclusions during the selection stage over a 10 day period during January 2016 highlights the point. As one provider said “They did not even go on to read our written submission!” This situation will become more frequent as purchasers are encouraged to reduce the number of tenders and therefore the costly process of appraisal.

The course uses a set of real selection stage questions as the basis for the day. Students will undertake a series of tasks that will allow them to consider the questions included in a typical selection process. They will look at the guidance contained in the regulations and consider what the appraisal officer is looking for, not only to avoid exclusion but to achieve a high score during the selection process.

### The day covers:

#### 1) Introduction.

What is the selection stage? What is its purpose? When do the regulations allow it to be used?

#### 2) Eligibility questions

There are a number of potential disqualifying factors which arise during selection. What are they and what systems could be put in place to guard against the answer resulting in failure?

These requirements include the grounds for disqualification of a Director, conflicts of interest as well as legal action against the company

#### 3) The financial appraisal

Selection stage responses may be strong in all aspects but still fail the financial appraisal resulting in disqualification.

What happens during financial appraisal?

What steps can the organisation take to prevent failure under this heading?

#### 4) Certification

The use of certification in the scoring scheme is not accidental, it is a direct response the regulations.

How does certification affect your score, and

What type of certification should be considered?



### 5) Policies

A frequent reason for failure during selection can be found in include questions about policies as well as the policies and procedures themselves.

What are the essential elements of a well written policy?

Which key policies does Selection require?

We will examine in detail:

- Health and Safety Policies
- Equal Opportunities and Diversity Policies
- Environment Management Systems
- Safeguarding (adults and children) Policies

In each case we will consider guidance which exists about what these policies should contain

### 6) Referees

How can the choice of referees affect your score?

What factors should be taken into consideration when deciding on referees?

### 7) Text questions

Most Selection stages require answers to text questions.

How these should be approached,

Is there a style that is more effective than others?

### 8) The 2015 Regulations

How are the 2015 Regulations impacting on the Selection stage of tendering?

### 9) Plenary

Discussion to reinforce learning and make sure students can raise any unfinished business.

This course is practical and uses a real set of tender documents. These are sent to each venue in advance by courier

**All courses are tailored to the precise requirements of the purchaser**

### Learning Outcomes

As a result of the course participants will:

- Have a clear understanding of what to do to increase their chances of success;
- Understand what their organisations needs to do to meet the requirements of selection and avoid exclusion during the appraisal process;
- Understand how they can be sure of progressing thought the Selection stage with a good score

**This is a full day course typically from 10 am to 4 pm with a breaks for lunch coffee and tea**

**Maximum number of participants – 18**



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**Fee package** Available in a one day taught format for up to 16 people. Cost £1,000 + VAT and travel. O/N accommodation on the night prior to the event (this is excluded from events run within the M25). The cost of the accommodation is usually paid directly to the hotel by the event organiser. This avoids potential difficulties regarding VAT.

**Room layout** – classroom style with a top table, screen and flipchart

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**Students attending previous courses have said:**

*“Very useful practical advice – I liked the practical exercises”*

*“I found the ‘commercial’ and ‘competitive’ focus very useful”*

*“Excellent insight into the complexities of commissioning and tendering”*

*“Very enjoyable – the tutor is very knowledgeable of his subject and facilitated the group work very well.”*

*“A most enjoyable and useful session – thank you”*

*“Everything was very relevant to me and my work.”*

*“This was probably the best course I have ever attended”*

