

Developing Tender Proposals for Non-Research Council Funders

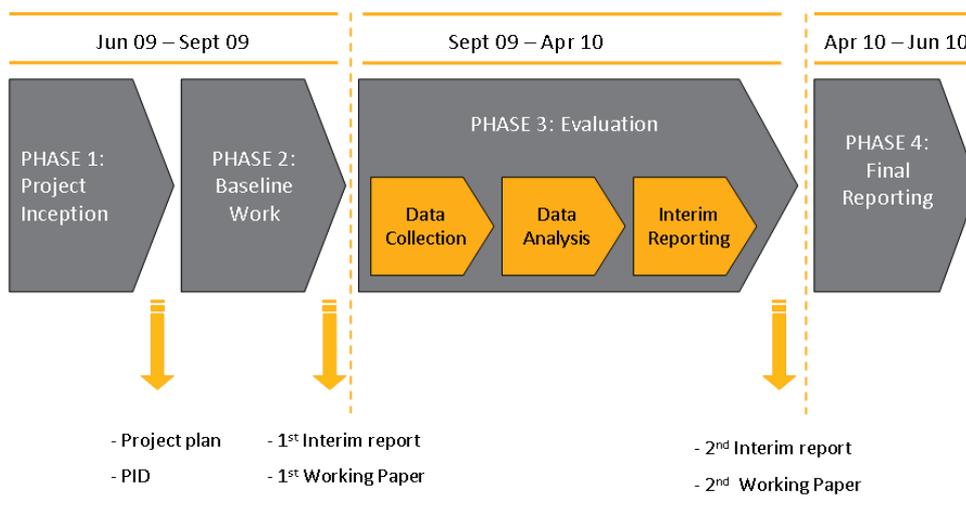
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General guidance:

- Each department or research centre should have a distinctive format that they use, a tender template or presentation guidelines. Funders like consistency; they like to know what they are getting. It also helps to prepare consistent, high quality tenders easily.
- If the funder requests the tender in a particular format then make sure you follow the format! Nothing will irritate a funder more than someone who blatantly ignores the requested format.
- Try to ask questions (sensible ones!) of the funder before you tender. This is particularly important if you are a new applicant or you have not been successful with the funder before. It helps to make sure you are on their radar and starts to build a relationship with them.
- Consistency in formatting is crucial. It shows attention to detail and gives the funder an idea as to what a final report would look like. Tenders must look consistent in their presentation and must be spell checked and proof read.
- Include a contents page and make sure the page numbers match throughout the final document! (And make sure the pages are numbered!)
- Tenders should include a summary section (1-2 pages) which highlight why the funder should choose your university (or specific researcher / unit / department), what key questions the research proposal addresses, key policy or literature context and the major methodological approaches.
- Start new sections on a new page. Sections are like chapters in a book and should be distinctly separate.
- Illustrate your methodology visually if possible. This helps provide a quick snapshot of what you propose to do when and can be used as a reference point for the funder as they read the tender. An example is included below.



- It can be useful to include a summary box at the end of each section which provides a quick summary of what will be achieved in that part of the research. This makes digesting the tender easier, especially if the project is large and has a complex methodology! An example of a summary box is below.

Stage Deliverables (or outputs):	
▪	x
▪	y
▪	z

- The inclusion of graphs and tables can add value and can be a useful way of including additional information in a tender in a succinct way.

Presenting budgets and milestones:

- Costs should be presented clearly with day rates against staff and a clear allocation of staff against each element of the research proposal. If the funder cannot work out how you have arrived at a budget you will lose credibility. You should avoid presenting FEC budgets unless specifically requested to do so by the funder.
- Always add some text explaining why what you are offering is excellent value for money. This can include your particular expertise, your methodological approach, extra (or free) days offered for additional presentations/work, discounted rates etc.
- An example budget presentation is included below. An Excel spread sheet can be used for ease of calculations and this can be copied and pasted into a Word document.

	Steve Brown	Sarah Marsh	Peter Wright	Andrew Polkinghorne	Total
DAY RATE:	£750	£650	£400	£350	
1 Inception Meeting	1.0	1.0			2.0
2 Policy Review	0.5	1.0	1.0	0.5	3.0
3 Stakeholder Consultation	2.0	3.5	2.5	2.0	10.0
4 Focus Groups		0.5	4.0	2.5	7.0
5 Reporting and Presentation	2.5	2.0	2.5		7.0
Total Days	6.0	8.0	10.0	5.0	29.0
Total Cost (£)	£4,500.00	£5,200.00	£4,000.00	£1,750.00	£15,450.00
Expenses @ 5%					£772.50
TOTAL COST (excl. VAT)					£16,222.50
VAT @ 20.0%					£3,244.50
TOTAL COST (incl. VAT)					£19,467.00

- VAT lines can be hidden on a spreadsheet if not applicable to the funder or the research being undertaken. It is worth keeping them on any template spreadsheet for ease of budget development.
- All tenders should include an outline of key milestones to be achieved. An example of how milestones could be presented is below. Gantt charts or something similar in Excel or Project are normally the most effective. Visual representations are usually easier to follow than tables of text.

	October	November	December	January	February
MILESTONES					
1. Inception Meeting	 Inception Meeting				
2. Policy Review					
3. Stakeholder Consultation					
4. Focus Groups					
5. Reporting and Presentation					
					 Final Report

Presenting relevant experience:

- CV's – two pages per person, starting on new pages, tailored to the funder and type of project. Bring most relevant research and experience to the top of the CV and highlight in a summary box. Photos of the researcher can be included.
- Organisational / research unit experience. This should be outlined within the text of the tender. Tie the proposed researchers to the previous experience and make the link very explicit.
- Think about how best to target the funder / audience. Are they looking for people with academic experience? Who is the funder and what outputs are they expecting? Are they looking for experience of engaging stakeholders, working with young people or facilitating workshops? If so a list of academic publications will appeal less! Try to tailor your experience to the funder, what are they looking for, put yourself in their shoes.

Creative methodologies:

- It may be appropriate to include different (unusual) methodologies or present your tender differently depending on the funder or the type of project.
- The use of colour, bullet points, photographs etc. can all be used effectively for research tenders in more creative fields or research requiring creative methodologies (i.e. engaging effectively with young people or in communities). A tender gives you the opportunity to demonstrate your understanding of the research but also to show how your approach to the research questions is relevant. This could be done, at least in part, by the approach you take to your tender.

Last thoughts:

- If time permits, ask someone independent to read the tender to check that it makes sense.
- If you are unsuccessful always ask for feedback, most funders will give it. Analyse the feedback and look for trends or issues that keep coming up.