



## Sustainable Electronic Procurement Case Study

**Branas Isaf Training**

**Personal Development Through Training**

[www.branas.co.uk](http://www.branas.co.uk)

***“eTendering experience proves invaluable in helping  
Welsh training company prepare for the inevitable  
move towards on-line public sector tender  
submissions”***



## **1.0 Introduction**

### **1.1 About this Case Study**

This publication is based on work undertaken as part of the EPROC project, [www.eproc.org](http://www.eproc.org), a collaborative European initiative commissioned to encourage and support the adoption of new digital procurement processes and tools by small and medium sized businesses (SMEs). The EPROC project is supported by European Regional Development Funding under the INTERREG IIB North West Europe Community Initiative on Territorial Development.

This eProcurement Case Study – focusing on eTendering – has been published with the full approval of the business concerned.

### **1.2 In simple terms, what is eTendering?**

eTendering is the use of secure, web-based, collaborative tools by buyers and suppliers to conduct the tendering process electronically on-line. This process can include the advertisement of the requirement, document production, supplier registration, electronic delivery of documents between buyer and supplier, right through to the contract award and publication.

From the small number of Local Authorities who have implemented fully working eTendering solutions, there is growing evidence they can deliver benefits to an authority in financial savings in terms of overhead costs, and savings in process costs, as well as valuable intangible benefits such as better management of the tender process, increased transparency of decision making and a reduced potential for disputes.

For more information on eTendering, see [www.eproc.org](http://www.eproc.org).

### **1.3 Synopsis**

Branas Isaf were originally introduced to eTendering by the Welsh Assembly Government's Department for Education, Lifelong Learning and Skills who decided they were going to use the eTendering route for their Work Based Learning tender rather than the more traditional paper based approach.

This Case Study describes and discusses the process that Branas Isaf went through to submit an on-line tender and in so doing provides a wealth of useful hints, tips and experience that other SMEs can benefit from.

## 2.0 Background

### 2.1 Business Profile

Branas Isaf, based in Corwen, north Wales, was originally established as a care home for Children with behavioral problems in 1999, but has since diversified into a number of related disciplines. One of the major strengths of the company is their training division and indeed they are now one of the leading providers of professional training to those working in the Early Years, Health and Social Care (Caring for Children and Young People as well as Adults) and Management Sectors.

Branas Isaf Training provides both bespoke training and vocational qualifications and has a particularly strong reputation for providing Health and Social Care NVQ training of the highest standard.

Over the last two years, the company has doubled in size which is indicative of a strong and successful company that is making the most of a growing market – indeed, they now have around 25 employees in total who are permanently based in Corwen.

Approximately 80% of their business comes from the private sector, with the remainder coming from the public sector. These customers include privately owned care companies, foster homes, private schools, as well as residential child care facilities.

Their Local Authority customers comprise both social services departments and schools and in north Wales include: Anglesey, Denbighshire, Gwynedd, and Wrexham. They also do business with other public sector organisations in Wales, such as the Welsh Assembly Government, and various Colleges and Universities. The majority of their public sector turnover is indigenous, although overall most of their business comes from across the border in England.

Their private sector customers include both the largest care organisations in Wales and England and also a considerable number of smaller ones. They estimate they have over 600 private sector customers in England and more than 400 in Wales – it is clear then that they are firmly established within the market and are strongly placed to compete with other businesses both small and large.

Indeed, their major competitive advantages are that they are able to deliver their training programs at realistic rates, but at the same time can deliver these programs around the needs of the customer – for instance, in delivering on-site training. In comparison to courses that are run by other organisations such as Colleges, they are also able to offer fast-track programs that are obviously of a more intensive nature. The benefit being that staff do not have to be released to go to College for the day.

Given the nature of their operations, repeat business is something they are very much accustomed to and it is usually the case of delivering training on a “roll-on –roll-off” basis to their clients.



**Branas Isaf Offices –  
Corwen, north Wales**

The company's plans for the future do not involve reinventing the wheel, but instead they intend to build on their core competencies, and deliver new innovative training courses and programs to meet the constantly evolving standards within the industry.

Branas Isaf have Investors in People status and recently gained the ISO 9001 accreditation. They also have a comprehensive sustainability policy which they pay particular attention to.

## 2.2 Business use of IT

The company has always been fairly IT literate and computers have been a core part of the business for many years. The latter are linked together on a network and all employees use standard Microsoft Office Software. Most members of staff have received IT training in-house and strong IT skills is a characteristic trait of all their personnel.

## 2.3 eProcurement Challenge

Branas Isaf were first introduced to eTendering in late 2006 by the Welsh Assembly Government's Department for Education, Lifelong Learning and Skills (DELLS). DELLS made the decision they were going to use Value Wales' eTendering system for their Work Based Learning tender framework agreement (period August 2007 to July 2010).

To start the process off, DELLS submitted a notice (partially detailed below) on the Welsh opportunities portal – [www.sell2wales.co.uk](http://www.sell2wales.co.uk) – advertising the framework agreement and explaining this was the route they were taking:

***“The tender process will be administered via Value Wales - a website that provides procurement support across the public sector. Contractors must register their details on the [www.wpi.bravosolution.com](http://www.wpi.bravosolution.com) site. Providers are required to submit their tender applications electronically by 5 February 2007 via the [www.wpi.bravosolution.com](http://www.wpi.bravosolution.com) site. This is an open tender exercise, there is no pre-qualification process, the only means of tendering is to submit electronic tender documents via the [www.wpi.bravosolution.com](http://www.wpi.bravosolution.com) site.”***

Alongside the on-line notice, DELLS also carried out off-line advertising using other means such as newspapers to explain how they were going to administer the tender process, as well as inviting businesses to attend a supplier adoption event. These events took place all around Wales, including Llandudno, Aberystwyth, Swansea, and Cardiff, and were used both to explain why DELLS were adopting this approach, and to provide a training session on how to use the Bravo Solution eTendering system. Supplier guidance notes were also provided to attendees.

Branas Isaf missed the event that took place in north Wales, but spoke to DELLS directly to find out more about the process and when they would be able to view the invitation to tender documents electronically. They were also able to access the comprehensive supplier guidance notes that were available on-line at [www.wales.gov.uk](http://www.wales.gov.uk). Their particular interest in the Work Based

Learning tender was to become the main contractor for Health & Social Care and Management qualifications.

The company did have their concerns with this new way of working, as Julie Warrington-Jones who is their Head of Funding commented: ***“In principle we felt it was a good idea, but as with anything that is IT based, there is always scope for things to go wrong, so yes, we were slightly concerned!”***

There were other aspects to this new way of submitting tenders that also made them somewhat skeptical in the first instance: ***“There was a lot of money riding on the contract, and at least if it’s sent recorded next day delivery or by courier you know for sure it’s got there – we were worried that our efforts could come to nothing!”***

The company have used eTendering on one other occasion and that was with an English Learning Skills Council (LSC) tender. This eTendering system also used the same Bravo Solution backbone, and a similar supplier adoption program was implemented by the LSC (on this occasion Branas Isaf attended the supplier open day).

### **3.0 Using the eTendering portal**

The following section details the process that Branas Isaf had to go through in submitting their tenders via the eTendering system, and discusses some of the issues and challenges they faced along the way.

The process is illustrated graphically via a number of screenshots from the eTendering system for Wales – “etenderwales”. Given that it has been updated over the years, the screenshots are not a carbon copy of what Branas Isaf would have seen. The narrative focuses on what they were required to do to submit their tender response, although the process and issues involved in submitting a PQQ (pre-qualification questionnaire) would have been very similar.

#### **3.1 Registering on the eTendering site**

The initial priority was to register on the eTendering site and this proved to be a fairly painless procedure. It was simply a case of following the “Suppliers register here” link (Figure 1) at <https://etenderwales.bravosolution.com/>, accepting the terms and conditions of the eTendering service user agreement, and entering their business and user details.

As part of the latter process, they were required to create a username and they were subsequently sent a unique password by eMail together with details of successful registration. Once they had done this, they were able to gain secure access to the site and thus were able to move forward.



**Figure 1: The Login Page for the “etenderwales” system**

### **3.2 Expressing Interest in the Invitation to Tender document**

Once Branäs Isaf had put in their username and password, they would have entered the “main page” as shown in the screenshot below (Figure 2). Given there was no PQQ document for the Work Based Learning contract, and it was an Invitation to Tender (ITT) open to all suppliers, it would have been located in the section “ITTs Open to All Suppliers”. By following this link on the “main page”, they would have been able to view all ITTs open for participation. It was then simply a case of clicking on the Work Based Learning contract to access brief details of the tender they were interested in.

However, at this stage, they needed to formally express interest in it, and would have done this by pressing the “Express Interest” button on the “Actions” navigation bar on the left hand side.

Once they had formally expressed interest, the tender was automatically moved to the “My ITT’s” area (Figure 3) which would give them the functionality to download any documentation, as well as receive any messages from the buyer related to the tender. Most importantly though it would enable them to work on the tender, and submit their response, which they wouldn’t be able to do before expressing interest. Any PQQs or ITTs that they had expressed interest in would have also featured in the “Projects” area of the site as shown in Figure 2.

**User Profile**

Thank you for registering on etenderwales eTendering Service.

[Manage Your Profile »](#)  
[Modify password »](#)  
[Manage Users »](#)

[Log out »](#)

**Opportunities**

[View opportunities on sell2wales »](#)

**User Guides**

[Supplier Helpcentre »](#)  
[Download \(pdf 829KB\) »](#)

**eTendering Helpdesk**

**Need assistance?**  
Please contact our eTendering Helpdesk info:  
**Phone:** 0800-011-2470  
**Fax:** 020-7060-0480  
**E-mail:** help@bravosolution.co.uk  
**Call me back!**

**Tender Projects**

- [Projects](#)
- Pre-Qualification Questionnaires (PQQs)
  - [PQQs Open to All Suppliers](#)
  - [My PQQs](#)
- Invitations To Tender (ITTs)
  - [ITTs Open to All Suppliers](#)
  - [My ITTs](#)

Figure 2: The “Main Page” after logging onto the system

**My ITTs**

ITT Code	ITT Title	ITT Closing Date	ITT Status	Response Status
1	itt_28787 All Wales Media Advertising ITT	02/04/2008 11:59	Running	Response Not Submitted To Buyer
2	itt_28753 All Wales Copier Paper ITT	10/03/2008 09:00	Running	Declined To Respond
3	itt_28752 All Wales Stationery ITT	10/03/2008 09:00	Running	Response Not Submitted To Buyer

Total ITTs: 3

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[ [Export to Excel](#) ] - [ [Search](#) / [Filter](#) ]

Figure 3: The "My ITTs" section which summarises the ITT, illustrates the closing date and ITT status (in this case “running”), as well as the response status by the supplier

### 3.3 Viewing details of the ITT document

Once they had clicked on the ITT as illustrated in Figure 3 above, they were able to access the project details and download the relevant documentation (Figure 4). The attachments they viewed were a combination of instructions, specification documents, terms and conditions, as well as a reference template in Microsoft Excel format. The first time they used eTendering they were not aware of the mass download function and therefore it proved a very cumbersome and time consuming process to download these one by one give the considerable number of documents they needed to access.

After viewing all the tender details, they were then in a position to make a decision on whether to respond or not. This they decided to do, and by pressing the “Reply” button on the Actions toolbar on the left hand side of Figure 4 it provided them with access to the tender response details (i.e. the questionnaires they would need to fill in).

The screenshot shows the eTenderWales interface. At the top, there's a navigation bar with 'Main Page | Logout', 'Welcome: Adams Arthur | Time Zone: GMT', 'Language: GB', and 'Select Module: Projects'. Below this are tabs for 'Projects', 'PQs', 'ITTs', and 'Auctions'. A breadcrumb trail reads '>> My ITTs | ITTs Open to All Suppliers'. The main content area displays 'Project : project\_17656 - All Wales Stationery and Copier Paper Framework' and 'Event : itt\_28752 - All Wales Stationery ITT'. A sidebar on the left contains a 'Details' section with links for 'Project Details', 'Settings', 'Buyer Attachments (9)', 'Messages (2)', and 'User Rights', along with an 'Actions' section with links for 'Printable View', 'Reply', 'Reject', and 'Back To List'. The main content area has a 'Response status' section showing 'Response Not Submitted To Buyer' and an 'Overview' section with the following details:

<b>ITT Code</b>	itt_28752
<b>ITT Title</b>	All Wales Stationery ITT
<b>ITT Description</b>	This procurement process is for the tender and award of a new Framework Agreement (Agreement) for the supply of stationery to the public sector in Wales. This procurement exercise is being conducted by Value Wales, which is a division of the Welsh Assembly Government. As a consequence of the Government of Wales Act 2006, the contracting party will be Value Wales.

Figure 4: Detailed information on the ITT including all the attachments

### 3.4 Submitting their response via the eTendering site

Going through the process of actually submitting their tender on-line proved to be fairly self-explanatory. Having said this, there are a number of features of the system and idiosyncrasies they feel are worth pointing out to readers of this Case Study.

With regard to most of the questions they were faced with, it was either a case of them selecting an option from a drop down list (typically yes/no type answers) or they had to fill in text boxes which were deliberately capped at around 512 characters (see Figure 5). Where a detailed reply was required, additional text boxes were provided. Those questions that were mandatory (i.e. those that had to be completed to successfully publish the tender), were indicated with a red asterix. Some of the boxes required numerical replies rather than a text based reply and these differences were clearly marked using appropriate icons.

etenderwales

Main Page | Logout Welcome: Adams Arthur | Time Zone: GMT Language: GB Select Module: Projects

Projects PQQs ITTs Auctions

>> My ITTs | ITTs Open to All Suppliers

Project : project\_17656 - All Wales Stationery and Copier Paper Framework  
Event : itt\_28753 - All Wales Copier Paper ITT

[ Save ] - [ Reset ]

Technical Envelope ?

Response status Declined To Respond

Technical Attachments >>> [ 0 ] [ Add Technical Attachments ]

A. CAPABILITY - Form Section ?

Question	Description	Response
1	Note Section 5.3: Technical Parameter - COPIER PAPER	
2	IMPORTANT Please ensure you download the relevant documents	
3 *	A.1 To what extent is your primary business activity related to the supply of copier paper	<input type="text"/>
4 *	A.2 Has your organisation had a contract cancelled, or not renewed, for failure to perform within the last three years?	<input type="text"/>
5 *	A.3 Has your organisation been the subject of a claim (contractual or otherwise) within the last three years based upon a failure of quality in design, work, materials or services?	<input type="text"/>

Legend  
\* = Mandatory Field  
abc = Enter text (2000)

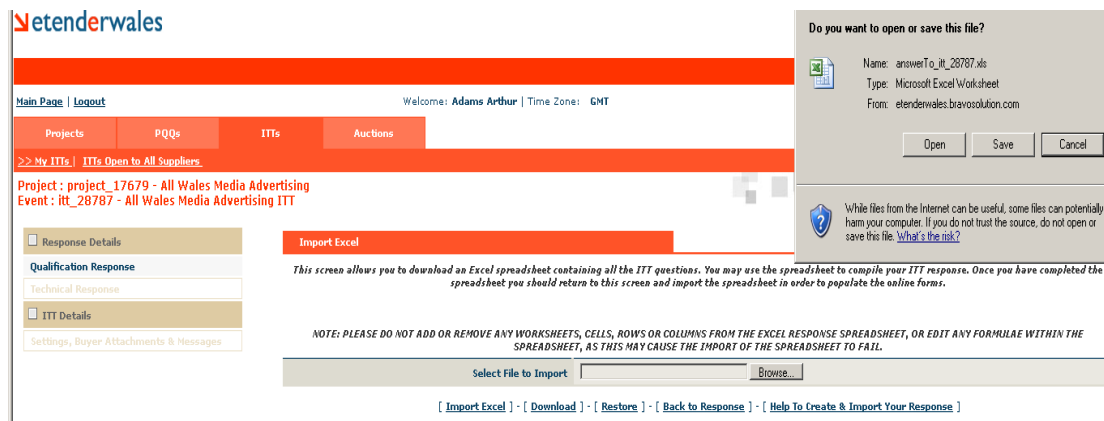
Figure 5: Filling in the on-line Questionnaires

## Attachments

They were also required to add attachments where the buyer requested them to do so, and it was important they attached these in the correct area. For instance, they needed to include their employer’s liability insurance certificate under qualification parameters, and not under technical or commercial parameters.

The process of actually attaching a document was however fairly simplistic and it was just a case of them scrolling up to the top of the correct parameter and clicking the “Add Attachments” button (as illustrated in Figure 5).

Although it was not an issue for Branas Isaf, in those circumstances where questionnaires are extremely large documents – tenderers have the option of either filling it in on-line, or exporting the web file into Microsoft Excel and then filling it in, and re-importing it (Figure 6). It is up to the tenderer to decide which method they are most comfortable with, but often the default recommendation is to use the export routine given that changes to ITT responses are not saved automatically. In such cases, it is worth remembering that it is important not to alter the format/structure of the spreadsheet whilst in Excel, as this will mean it will not upload!



**Figure 6: Downloading an Excel Spreadsheet of the tender questions**

## Saving their work

It didn't take them long to realise how important it was to save their work on a regular basis. This was something they also did whenever they left their desks and obviously prior to logging off each time. As with most government web sites, the "etenderwales" site is set-up in such a way that if you are inactive for around 15 minutes there is a timeout set for security reasons and you will lose your work if you haven't saved it.

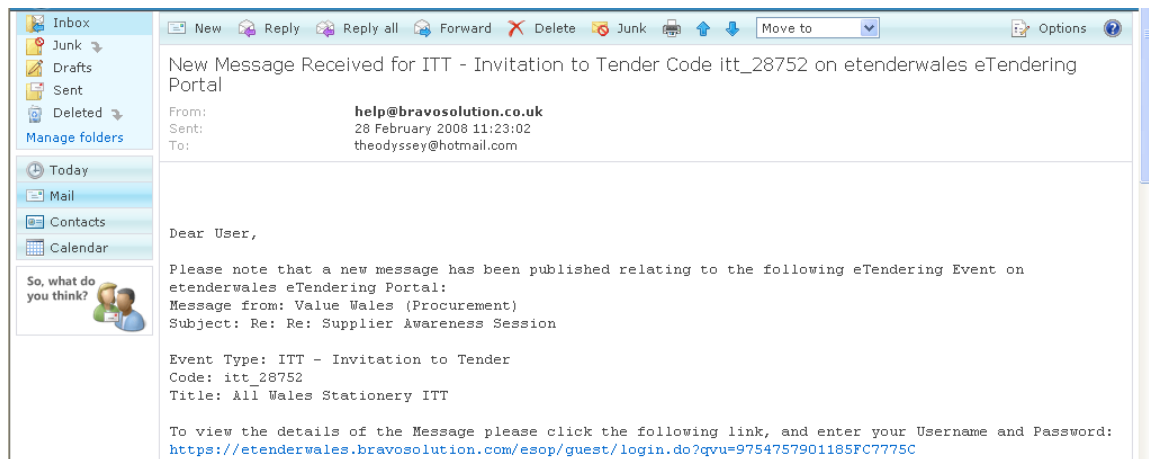
## Using the help function

Whilst filling out the questionnaires, if there was any technical aspects they weren't sure of, they had the opportunity to use the free on-line help function. Each section and sub-section had a clearly visible "question mark" icon they could click on to take them directly to the relevant section of the Bravo Solution on-line supplier helpdesk. If they could not find an answer to their query via the on-line helpdesk, they also had the back-up option of eMailing or using the helpdesk free phone number. It is worth remembering that the buyer is not responsible for answering any technical queries!

## Receiving and sending messages

All communication to and from the buyer with eTendering is typically carried out via electronic means. This meant that once Branas Isaf had expressed interest in the ITT document, they received all the notifications regarding the ITT process. These would arrive via an eMail alert (see Figure 7) from the platform to their inbox informing them there is a message waiting in the eTendering system. Clearly then it is extremely important that tenderers make sure these eMail alerts from the buyer are not spammed (i.e. automatically sent to the junk folder or deleted)!

Messages from the buyer are used for a whole variety of reasons from informing suppliers of awareness sessions, to any slight changes that might have been made to an ITT.



**Figure 7: Receiving an eMail alert from the Buyer**

In order to send any queries to the buyer and seek clarifications on issues such as documentation, requirements and specifications, Branas Isaf had to use the secure messaging area of the eTendering portal. It was made clear that no response would be given to any questions raised outside the eTendering portal.

To actually send a message was a fairly easy process and it was just a case of going onto the messages area of the ITT document and clicking “create message” and secondly using the “send” command. As before, once the buyer responded, they received an eMail alert to inform them there was a reply waiting for them.

One of the issues they had with the messaging process was that it sometimes took a long time for them to get a response, and given the nature of eMail communication, these replies tended to be brief and at times did not answer the question as they’d hoped. This they found could prove particularly frustrating as it could take up to a week for them to get the response they wanted, and enable them to progress their tender.

In order to avoid duplication, any reply by the buyer is normally published on the system so that it is shared with all tenderers (obviously without disclosing the name of the tenderer who initiated the query).

### **Publishing their tender**

Once they got to the stage where they were totally happy with their tender, they had to publish it for the buyer to see the submission. This was just a case of pressing the “publish” button in the navigation bar “actions”. Once they had done this, they immediately received an eMail to say they had successfully published their tender. It is worth remembering that even after publishing, they still had the option of editing it until the closing date, but for this to count they would have needed to re-publish it.

## **3.5 Award of the Contract**

Once evaluation is complete, an award decision is made and normally notification of this is via an automated system generated eMail alert, an eMail from the buyer, and/or a secure message from the Buyer via the portal (or a

combination of these). The winner icon is then portrayed on the tender summary details within the eTendering platform.

Although typically the electronic route is adopted, the buyer can decide to notify the supplier of their success via traditional means, and in this particular case, Branas Isaf received a letter through the post. This was something of a surprise for them given that the rest of the process had been electronic.

### **3.6 Adding additional users to the site**

Although Julie Warrington-Jones registered on the eTendering portal and therefore automatically became the default user; Ceri Allen (their Marketing and Development officer) also at times needed access to the system.

Branas Isaf were able to add Ceri as an additional user by clicking on the “Manage Users” link on the “main page” of the site and then simply by following the “add user” link. Potentially additional users could have been added as needed in order to enable colleagues to be involved at specific stages of the tender.

## **4.0 Benefits and Costs**

In terms of the benefits of submitting a tender via electronic means as opposed to the traditional paper based route, the company did not have a strong opinion one way or another. For them, it was nice to be able to make revisions right up to the deadline, but historically they would normally plan to complete their paper based submission way before the closing date anyway. One could also argue there were slight cost savings to be made in on-line tender submission, but again this was not a big issue for them.

In many ways, the major benefit they can see in eTendering is in supporting their (potential) public sector customer/s, in the sense that it is clearly a far more efficient process for them. They are also aware that it is a more sustainable way of operating, and this is something they feel particularly strongly about.

There were no additional costs for the company to incur in submitting an eTender.

## **5.0 Lessons Learned**

Branas Isaf did not find that submitting their tender on-line was a particularly arduous process and indeed Julie Warrington-Jones made the point ***“We didn’t have many problems at all with eTendering and it was certainly a case of a small learning curve and time commitment to get used to the system. Once you have worked your way through it once, the whole process becomes very familiar”***.

However they do feel eTendering is the route the public sector will increasingly be adopting in future and therefore would like to bring the following high level issues to the attention of other businesses to help speed up the learning process:

- ***“We recommend you take full advantage of any supplier open days that provide you with further details of the eTendering system being adopted – these are really useful, especially the demos. It also provides an opportunity to ask those niggly questions you might have and help banish the inevitable doubts! As long as you have the right guidance and support, particularly in the first instance, it really isn’t difficult”***
- ***“Don’t be daunted – the system really is easy to use!”***
- ***“Make sure you save your work on a very regular basis as you progress your tender response, if you don’t, you will end up being very, very annoyed with yourself – and so will your boss!!”***
- ***“Be aware that it can take a while to get satisfactory responses from any eMail queries you have for the public sector procurement officer – make sure you build in time for this”***
- ***“Although eTendering enables you to submit your response in theory at the last minute – we recommend you don’t do this, just in case there are some technical problems”***

Other than the above main points and the issues discussed in section 3, the only additional advice they would give is to adopt normal best practice approaches to submitting a tender. The latter point probably sums up eTendering, in that once a business has gone through the initial brief pain barrier there is not much to it.

## **6.0 Summary**

At first, Branäs Isaf had their doubts about eTendering, but these were very normal and natural human fears. Reassurance via way of supplier open days they feel are particularly important in easing these fears, as it brings the human factor back into the equation.

As time has moved on, the company have been able to see at first hand how eTendering has changed for the better. This is no surprise given that the technology has inevitably improved, as have the procedures and processes that have accompanied the advancements in technology. Like many other aspects of eProcurement, eTendering is still a relatively new discipline.

If they had one small gripe they would bring to the attention of the public sector, it is the fact that the whole process becomes electronic and this includes communication with the buyer. Although they understand the buyer maybe faced with the challenge of having to respond to a large number of eMail enquiries, and therefore this would naturally have an impact on response times, they still feel more could be done to improve this situation. Changes have however recently been made to the “etenderwales” system to help address this issue, by providing the functionality for buyers to incorporate deadlines for suppliers to seek clarifications and importantly, a deadline for buyers to respond.

Other than this, they have no issues at all with eTendering and feel it is just a natural progression that was bound to happen in time. At the moment it

appears that submitting tenders electronically within the public sector is mainly confined to larger contracts, but there is no doubt this will change in the near future. Indeed, Value Wales, the procurement arm of the Welsh Assembly Government are currently pushing forward a new eProcurement gateway (see [www.eproc.org](http://www.eproc.org)) called “xchangewales” that is expected to lead to greater use of eTendering.

All businesses, both large and small therefore need to be prepared for this development. The underlying message from Branäs Isaf is – don’t worry too much about it, and do try and take on board some of the key learning points from this Case Study to make life easier for you.

Branäs Isaf remain totally committed to supporting their public sector customers as they progress their use of eProcurement and are well aware that these moves are ultimately about reinvesting these savings in front-line public services for the benefit of us all.

Branäs Isaf can be found at [www.branas.co.uk](http://www.branas.co.uk)