

Social Enterprise

Contractor Readiness Checklist

Adapted from an original developed by Paul Stepczak, 2025

This checklist is a self-assessment tool to help you evaluate your organisation’s readiness to deliver contracts and pursue tendering opportunities. Use it to identify strengths, gaps, and priority actions across key areas such as capability, systems, and market positioning. Revisit it regularly as your team, processes, and pipeline evolve.

1. Awareness & Promotion: Elevator Pitch in 2 minutes

Checklist item	YES	NO
We’ve created a simple 1-pager or slide deck that clearly explains our services.		
We can describe our delivery approach in plain, compelling language.		
Our social media, website, and networks consistently reinforce our offer.		
We are easily accessible (our location, opening hours, and contact details).		

2. People & Skills: Would our team list inspire confidence in a bid?

Checklist item	YES	NO
We have a named team with relevant expertise and experience.		
Gaps are covered by partners or associates.		
We can evidence staff/volunteer skills in delivery, compliance, and project management.		

3. Track Record & Credibility: Do we look like a safe pair of hands?

Checklist item	YES	NO
We can provide references from past projects or grants.		
We have case studies that prove outcomes, not just activities.		
We can show collaborations that strengthen our offer.		
We can demonstrate alignment with national policies.		

4. Systems & Processes: Could we hand over policies and accounts tomorrow if asked?

Checklist item	YES	NO
Policies are current (human resources, governance, data protection, equality, environment).		
We have insurance at required levels.		
Our financial systems can separate and track contract income/expenditure.		
Monitoring & evaluation are embedded, not an afterthought.		

5. Financial Resilience: Can we deliver a contract without putting ourselves at risk?

Checklist item	YES	NO
We know our turnover, reserves, and cashflow position.		
We've mapped risks if payment is delayed.		
We can evidence cost recovery (overheads, staff time, admin).		
We have a day rate with a profit margin that is aligned to our financial sustainability.		
We have a pricing matrix for different clients (e.g. small charities v Government contracts).		

6. Partnerships & Networks: Are we known and visible to our target market?

Checklist item	YES	NO
We have partners we can co-deliver with if needed.		
We've explored entering as associates/subcontractors before leading bids.		
We're plugged into networks where opportunities are shared.		
We are building relationships with the public sector and buyers.		

7. Market Awareness: Do we know what we are measured against, not just what we do?

Checklist item	YES	NO
We've identified procurement channels.		
We know how to respond to tenders, RFPs and technical quality questions.		
We can demonstrate how our work contributes to social value (well-being, inclusion, sustainability).		
We understand that we need to deliver what is asked of us, not what we think needs to happen.		