



Tendering Procedures Concepts, Skills & Bid Evaluation

Website: www.btsconsultant.com

Email: info@btsconsultant.com

Telephone: 00971-2-6452630

Procurement
Supply Chain
Distribution
Time to Market

Tendering Procedures Concepts, Skills & Bid Evaluation

Introduction:

The overall aim of this course is to provide participants with the knowledge, concepts and skills needed to perform all tendering tasks. The course covers each step of the tendering processes and procedures as well as the different techniques and approaches used in evaluating the bids. Participants in this interactive course will learn essential tools and techniques used in analyzing submitted bids including preliminary examination, technical evaluation and commercial evaluation.

The engagement and management of contractors and suppliers is a vital part of the oil, gas and petrochemicals industry: huge sums of money are at stake, with projects of all types and sizes dependent on successful selection and management of contractors, vendors, providers of professional services and other third party suppliers. Procurement teams need to be able to put the right contracts in place which means clearly and accurately defining user requirements, attracting and selecting the right bidders to make proposals, correctly evaluating their proposals and ultimately making a contract award. This course will cover the key elements of the procurement cycle up to and including contract signature. It addresses the needs of professionals carrying out purchasing functions in the petroleum industries, and will enable them to develop and improve their key skills to manage tenders, bids and other competitive proposals. This course will feature:

- Setting the best strategy for the procurement
- Planning and managing a tender process

- Selecting the best form of contract
- Examining the inherent risks in bids and tenders
- Techniques to attract suitably qualified vendors to your bid opportunity
- Methods to sift out unsuitable vendors
- How to optimize the interaction between requesting departments and procurement teams
- Alternative methods for developing requirements documentation, such as the specification or scope of work
- Model clauses in commercial terms and conditions
- Technical and commercial evaluation methodologies
- Effective Management of the results after the competition

Who should attend?

Procurement Managers, Purchasing Staff, Engineering, Operational and Maintenance Personnel, Contracts Engineers, Administrators, and Managers, Commercial, Financial and Insurance Professionals, Project and General Management, Contracts & Contracting Unit Professionals, Project Professionals, Procurement & Purchasing Staff, Purchasing Professionals and Procurement Officers, Commercial Professionals, Contract Administrators, Contract Administration Professionals, Contract Managers and Contract Professionals, Supply officers, Buyers, Project Coordinator's, Project Managers and other Project Professionals, Claims Personnel, Legal Advisers, Contract Strategists, Business Audit Officers, Engineers, Project Construction Professionals, Contract Administrators, Contract Professionals and Project Coordinators, Buyers, Purchasing Professionals and Procurement Officers, Contracts Managers, Project Managers, Tenders, Contracts, Buyers, Purchasing, Financial Personnel, Tendering, Purchasing, Project Management Professionals, Engineering, Operational, Trade, Finance, and Maintenance

Professionals, all others who are involved in the planning, evaluation, preparation and management of tenders, specifications, awards, and contracts that cover the acquisition of materials, equipment, and services and who are in organizations whose leadership want high levels of competency in those involved in these activities, those from a Project Management or General Management background who do not think they have sufficient understanding of contract issues, those new to the function, preparing for a major project, or experienced managers looking for a refresher, anyone involved in the management of risk, those involved in implementing and administering contracts and handling claims and change orders; also those involved in any conflict or dispute with a contracting party and interested to learn how to avoid or resolve these contractual issues, those involved in contract and business related negotiations, those involved in any aspect of implementing, managing or administering contracts in the post-award phase.

Course Objectives:

By the end of this course, delegates will be able to:

- Determine the procurement strategy choices available for a given opportunity
- Plan and manage a competitive tender process from A to Z
- Identify, assess and make proposals on how to manage procurement risks
- Select and apply alternative approaches to defining user requirements
- Create an appropriate evaluation methodology to judge bids and tenders
- Evaluate vendor proposals from a technical and commercial perspective

- Handle the outcomes from a competitive bid process
- List the contracting stages from setting the scope of work to awarding the contract
- Outline the main objectives for the tendering process and recognize other alternative contracting methods
- Prepare the tendering strategy and determine the sourcing method, scope of work of the project and plan the evaluation process of the bidders
- Evaluate in-depth the process of preparing tenders and selecting potential contractors
- Identify preliminary, technical and commercial evaluation procedures as well as apply several methodologies using criteria, weights and scoring protocols to optimize bidder's selection process

Course Outline:

Overview of Contracting and Tendering

- Definition of a contract
- Stages in contracting
- Preparation and tendering
- Award and administration
- Defining tendering
- Purpose of tendering
- Alternatives of tendering

Objectives of Tendering

- Tendering process
- Contracting methods

- Competitive bidding
- Competitive proposals
- Reverse auction

Tendering Preparation

- Identifying requirements
- Setting scope of work
- Planning the evaluation process
- Identifying suppliers
- Developing tender documents
- Invitation to tender
- Terms and conditions
- Tender briefing
- Receiving and opening bids

Commercial and Financial Consideration

- Contract pricing, fixed price, cost plus, unit price and measured work
- Special forms of contracting
- Payment terms
- Value for money
- Whole life costing
- Most Economically Advantageous Tender (MEAT)
- Contractor's strategy
- Bid and no-bid decision

Tender Evaluation and Award

- Evaluation process

- Preliminary examination of bids
- Detailed examination of bids
- Rating scale
- Scoring protocol
- Compliance matrix
- Technical bid scoring
- Evaluation report
- Awarding of contract
- Post award conference
- Debriefing unsuccessful bidders
- Documentation
- Mistakes and protests