

Successfully Selecting Contractors and Consultants: Tendering, Bidding and Awarding

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Introduction:

Both the quality and economy of construction projects depend on the efficiency and skills of contractors and consultants. Following the proper procedures in the preparation of tendering documents and risk management is a very important step for the evaluation and selection of consultants to achieve high quality and keep projects within budget. Also, design/build projects require a different method to ensure construction on time, within budget and according to specifications. This workshop presents tested procedures involved in preparation of tendering documents and managing risks, evaluating and selecting construction contractors and consultants, as well as design/build contractors for construction projects.

OVERVIEW

After participating in this course, you will be able to:

- Prepare better tendering documents to reflect the stakeholders' objectives, assess the potential risks, and devise the tendering strategy to manage such risks
- Conduct the contract preparation and bidding to the contract award process with the knowledge of the relative responsibilities of each party involved
- Pre-qualify bidders using the qualifications suited to your project
- Distinguish among the types of bid calls and types of contracts
- Employ bonds and insurance more knowledgeably
- Make productive use of the bidding period while the contractor is putting together a bid
- Reduce surprises with the knowledge of how contractors approach the preparation of their bid, what their criteria for mark-ups are, and what procedures they use to assemble and finalize their bid
- Use new methods of bidding being contemplated by the industry
- Select a contractor and get construction underway without delay

Who Should Attend?

Buyers of construction in Public Works Departments of federal, provincial and municipal governments, as well as buyers of construction in the private sector; project managers and construction managers representing owners, engineering consultants and contractors who want to understand the process.

Course Objectives:

To familiarize participants with the procedures to prepare tendering documents and manage risks, and evaluate and select the most suitable construction contractors and consultants to help ensure project completion on time, within budget and according to specifications.

Programme Outline:

Module 1

Welcome, Workshop Preview, Learning Outcomes and Assessment Method

Registration and Coffee

- 1. Introductions and Participants' Objectives
 - Importance of the project life cycle in construction

2. Importance of Tendering during the Project Life Cycle

- Project life cycle and essentials of project delivery
- Project phases
- Design phase
- Procurement
- Construction phase
- Closing out and commissioning

3. Contractual Risk Management

- Reviewing the fundamentals of project risk
- Risk definition
- Elements of risk assessment

- Elements of risk control
- Planning a risk assessment
- Risk mitigation and management
- Workshop I
- Case study: Risk management and allocation of risk between parties for effective project management
- Discussion of lessons learned

4. Selecting Contracting Strategies and Procurement Methods, and the Impact of Disputes during the Project

- Contract types
- General contracts
- Lump sum / Fixed Price Contracts
- Unit price contracts
- Cost-plus-A-fee contracts Design-build delivery system
- Design-Build contracts Alternative Dispute Resolution (ADR)
- The Four 'Ations
- Conflict management systems design

5. Project Management Delivery System

- Standard form of agreement
- Sample contract
- Reducing risk when selecting construction projects
- Factors Influencing Selection Process
- Other factors affecting selection
- Major factors of success6. Project Organization The Role of the Parties – Responsibility Matrix

Module 2

- Employer's responsibilities
- Financing the project
- Engaging competent consultants
- Providing project information
- Providing a usable site
- Obtaining applicable permits
- Engaging contractors
- Approving / rejecting changes
- Being involved with the project

- Workshop II
- Case study: Establishing a responsibility matrix and a line of communication for effective project control
- Discussion of lessons learned

7. Design Management Process

- Project Design Management
- Design Management Plan
- Design Team
- Building Quality into the Design Team
- Improving Design Quality
- Quality Review Checklists
- Flowcharts
- Forms8. Preparing Tendering Documents

Module 3

- Project Manual Concept
- Forms of Agreement
- Conditions of Contract
- Introduction to Specifications Organization
- Methods of Specification
- Substitutions
- Submittals

9. Bid Documents

- Invitations to bid
- Instructions to bidders
- Information available to bidders
- Bid forms and what they represent
- Supplementary bid forms
- Attachments to bid forms
- Unit prices, alternate prices, separate prices, itemized prices, identified prices
- Contract price / contract time
- Form of contact / general and supplementary conditions
- Workshop III

- Case Study: Establish the most effective project delivery system to meet the project targets
- Discussion of lessons learned

10. General Aspects of Tendering, Bidding and Award

- Advertisements for bids on public works
- Advertisements for bids in the private sector
- Pre-qualification
- Value engineering
- Constructability review
- The decision to bid
- The bidding (estimating) period
- Accuracy of bidding information
- Instructions to bidders
- Addenda
- Alternates
- The bid form
- Modifications and withdrawal of bids
- The award Course evaluation
- Final Adjournment
- Concluding remarks