LM032:
Advanced Tendering Procedures & Bid Evaluation
Training Description:

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 advanced level 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 training 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

Training Objectives:

By the end of the training, participants 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

Training Designed for:

This training course is suitable to a wide range of professionals in the petroleum industries, but will greatly benefit those who are working as a Contract Professionals and Administrators, Contract Analysts and
Engineers, Specifiers, Buyers, Purchasing Professionals and Procurement Officers and anyone involved in the preparation, evaluation and management of commercial invitations to tender, requests for bids and proposals and contracts for the purchase of services, materials or equipment.

**Training Program:**

**DAY ONE:***

**PRE TEST**

**SETTING THE STRATEGY FOR BIDS AND TENDERS**

**Competency Description:** As procurement, professional you need to take the lead, or provide assistance to others, in setting the purchasing strategy, and then turning the strategy into an effective tender plan.

**Key behaviours:**

- Leadership within your function
- Setting the direction of the purchasing project
- Tender Process planning management
- Giving advice and guidance to requesting departments

**Topics to be covered:**

- Competitive and non-competitive bids
- Selecting the tender strategy
- Creating the tender plan
- Using e-procurement techniques
- Analyzing Tendering risks
- Choosing the best contract type, including:
  - Lump sum contracts
  - Fixed price contracts
  - Cost reimbursement contracts
  - Measurement contracts
  - Industry specific contract types

**DAY TWO:**

**BEST PRACTICES IN TENDER PROCEDURES**

**Competency Description:** As the procurement lead, or as a significant contributor to implementing the tender plan, you need to have an excellent understanding of what the tenders process is and how to add value to the process.

**Key behaviours:**

- Expedite the selection of the bidders
- Facilitate and enhance the development of an internal cost estimate
- Constructively challenge the requirements assessment
- Manage the tender activities efficiently and effectively
- Avoiding external communications trap

**Topics to be covered:**

- The End to End procurement cycle
- Seeking expressions of interest
- Advertising the contract
DAY THREE: OPTIMIZING THE TENDER DOCUMENTS

Competency Description: The tender process depends on bidders receiving documentation they can understand and that encourages them to bid cost-effective solutions to meet the buyer’s needs. Every document in the buying organization’s Invitation pack can improve or reduce the prospects of a successful competition. Procurement professionals should apply their skills to encourage a healthy competitive response.

Key behaviours:
- Suggest improvements to the statement of requirements
- Contribute to the debate about the terms and conditions to apply
- Identify the unintended consequences of the scope of work documents
- Plan a robust and realistic tender response schedule

Topics to be covered:
- Contents of the Tender package?
- Ensuring a robust specification / Scope of Work
- Defining the response you require from bidders
- Essential clauses in the draft terms and conditions
- Anticipating and reducing the risk of scope change

DAY FOUR: MANAGING THE TECHNICAL AND COMMERCIAL EVALUATION

Competency Description: Many organizations recognize that the cheapest compliant proposal may not give the best value for money. But how can organizations establish a fair and transparent process that enables them to select a bid that is not the lowest price?

Key behaviours:
- Understand the evaluation options
- Make the case for alternative evaluation and award criteria
- Construction of an evaluation framework

Topics to be covered:
- The purpose of bid evaluation
- Lowest price or best value for money?
- Stages of the evaluation
- Clarifying bids to assist the evaluation
- Choosing Evaluation / Award criteria
- Techniques to carry out the evaluation

DAY FIVE: MANAGING THE CONTRACT AWARD STRATEGY

Competency Description: The results of the evaluation should lead to a contract award to the winning bidder and the rejection of unsuccessful bids. But the process needs careful communications and
sometimes the result is challenged or the winner declines the award. What are the traps to avoid and tips to follow to ensure the competition leads to contract commencement?

**Key behaviours:**
- Avoiding process traps for the unwary buyer
- Dealing with disappointed losing bidders
- Securing the commitment of the winners

**Topics to be covered:**
- Communicating the results – internally and externally
- Working with Tender Bonds and Performance Guarantees
- Dealing with disputed contract awards
- Operating under pre-contract Letters of Intent
- Managing pre-contract scope changes

**Course Conclusion**

**POST TEST and Evaluation**

**Training Requirement:**

“**Hand’s on practical sessions, equipment** and **software** will be applied during the course if required and as per the client’s request”.

**Training Methodology:**

This interactive training course includes the following training methodologies as a percentage of the total tuition hours:-
- 30% Lectures, Concepts, Role Play
- 30% Workshops & Work Presentations, Techniques
- 20% Based on Case Studies & Practical Exercises
- 20% Videos, Software & General Discussions
- Pre and Post Test

**Training Certificate(s):**

Internationally recognized certificate(s) will be issued to each participant who completed the course.

**Training Fees:**

**As per the course location** - This rate includes participant’s manual, hand-outs, buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

Note: The 5% VAT (Value Added Tax), will be effective starting 01st of January 2018 as per the new regulation from the UAE Government. The VAT applies for all quotation both for local and abroad.
### Training Timings:

**Daily Timings:**
- 07:45 - 08:00  Morning Coffee / Tea
- 08:00 - 10:00  First Session
- 10:00 - 10:20  Recess (Coffee/Tea/Snacks)
- 10:20 - 12:20  Second Session
- 12:20 - 13:30  Recess (Prayer Break & Lunch)
- 13:30 - 15:00  Last Session

**For training registrations or in-house enquiries, please contact:**

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Training & Career Development Department