Advanced Tendering Procedures & Bid Evaluation

Effective Tendering, Bidding Strategies & Evaluation

INTRODUCTION

The engagement and management of contractors and suppliers is a vital part of the oil, gas and petro-chemicals 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 GLOMACS Advanced Tendering Procedures & Bid Evaluation training seminar 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 GLOMACS 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

OBJECTIVES

By the end of this GLOMACS training course, 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 METHODOLOGY

The instructor will deploy a full range of lively and interactive practical training methods, including exercises, role plays, case studies, practice sessions and group discussions. Each topic will be underpinned by a presentation that highlights key issues to focus on. The learning experience will be supported by a reference manual containing model documents and templates, case studies and examples of best practice. Participants will draft answers, make presentations and receive personal feedback on their performance. Discussions will enable participants to share their own experiences with the rest of the group.

ORGANISATIONAL IMPACT

The organisation will benefit from:

• More effective and efficient procurement practices
• Improved documenting of the organisation’s buying requirements
• A better approach to the supplier market
• A reduction in failed procurements, where contractors and vendors decline to participate in competitive procurements
• A reduction in financial and other risks to the organisation, by making better contracts
• An improvement in the performance of contractor performance, by choosing better contractors, and using more appropriate terms and conditions

PERSONAL IMPACT

Delegates will gain knowledge, skills and understanding about:

• Competitive procurement procedures
• What to do if competitive procurement is not an option
• How to source suitable contractors and vendors
• How to improve the scope of work documentation
• How to evaluate bids and proposals
• How to manage risks through better analysis and procurement choices

WHO SHOULD ATTEND?

This GLOMACS training course is suitable to a wide range of professionals in the petroleum industries, but will greatly benefit:

• Contract Professionals and Administrators
• Contract Analysts and Engineers
• Specifiers, Buyers, Purchasing Professionals and Procurement Officers
• 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
DAY 1
Setting the Strategy for Bids and Tenders

• Competitive and Non-competitive Bids
• Selecting the Tender Strategy
• Creating the Tender Plan
• Using e-Procurement Techniques
• Analysing Tendering Risks
• Choosing the Best Contract Type, including
  • Lump Sum Contracts
  • Fixed Price Contracts
  • Cost Reimbursement Contracts
  • Measurement Contracts
  • Industry Specific Contract Types

DAY 2
Best Practices in Tender Procedures

• The End to End Procurement Cycle
• Seeking Expressions of Interest
• Advertising the Contract
• Pre-qualification Methodologies
• The Importance of the Internal Cost Estimate
• What is the role for negotiation?

DAY 3
Optimizing the Tender Documents

• 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 4
Managing the Technical and Commercial Evaluation

• 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 5
Managing the Contract Award Stage

• 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
Advanced Tendering
Procedures & Bid Evaluation
Effective Tendering, Bidding Strategies & Evaluation

REGISTRATION DETAILS

LAST NAME:________________________________________
FIRST NAME:_______________________________________
DESIGNATION:_____________________________________
COMPANY: ________________________________________
ADDRESS: ________________________________________
__________________________________________________
CITY:______________________________________________
COUNTRY: ________________________________________
TELEPHONE:______________________________________
MOBILE: __________________________________________
FAX:________________________________________________
EMAIL:_____________________________________________

AUTHORISATION DETAILS

AUTHORISED BY:___________________________________
__________________________________________________
DESIGNATION:_____________________________________
COMPANY: ________________________________________
ADDRESS: ________________________________________
__________________________________________________
CITY:______________________________________________
COUNTRY: ________________________________________
TELEPHONE:______________________________________
MOBILE: __________________________________________
FAX:______________________________________________
EMAIL:_____________________________________________

PAYMENT DETAILS

☐ Please invoice my company
☐ Cheque payable to GLOMACS
☐ Please invoice me

CERTIFICATION

Successful participants will receive GLOMACS’ Certificate of Completion

4 WAYS TO REGISTER

Tel: +971 (04) 425 0700
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TERMS AND CONDITIONS

• Fees – Each fee is inclusive of Documentation, Lunch and refreshments served during the entire seminar.
• Mode of Payment – The delegate has the option to pay the course fee directly or request to send an invoice to his/her company/ sponsor. Credit card and cheque payments are both acceptable.
• Cancellation / Substitution – Request for seminar cancellation must be made in writing & received three (3) weeks prior to the seminar date. A US$ 250.00 processing fee will be charged per delegate for each cancellation. Thereafter, we regret that we are unable to refund any fees due, although in such cases we would be happy to welcome a colleague who would substitute for you.
• Hotel Accommodation – is not included in the course fee. A reduced corporate rate and a limited number of rooms may be available for attendees wishing to stay at the hotel venue. Requests for hotel reservations should be made at least three (3) weeks prior to the commencement of the seminar. All hotel accommodation is strictly subject to availability and terms and conditions imposed by the hotel will apply.
• Attendance Certificate – a certificate of attendance will only be awarded to those delegates who successfully completed/ attended the entire seminar including the awarding of applicable Continuing Professional Education Units/Hours.
• Force Majeure – any circumstances beyond the control of the Company may necessitate postponement, change of seminar venue or substitution of assigned Instructor. The Company reserves the right to exercise this clause and implement such amendments.
• Fair Access / Equal Opportunities – In the provision of its services as a world-class Training Provider, the Company is committed to provide fair access / equal opportunities throughout the delivery of its courses and assessment leading to the completion of training seminars, or 3rd party qualifications/certifications.