PROCUREMENT PLANNING, TENDER MANAGEMENT & BID EVALUATION COURSE

Introduction

This course provides Procurement Planning, Tender Management and Bid Evaluation experts a comprehensive and practical approach to managing procurement from needs identification through tender award and transition into contract implementation. Poor procurement planning and weak tender evaluation can result in inappropriate purchases, delayed projects, excessive costs, procurement disputes and poor supplier performance. This programme addresses these challenges systematically. Participants learn how to translate organizational needs into procurement requirements, develop procurement plans, prepare appropriate specifications and terms of reference, select suitable procurement methods and develop clear tender documentation. The programme gives particular attention to bid evaluation. Participants examine preliminary, technical and financial evaluation, evaluation criteria, scoring methodologies, due diligence, evaluation reports and governance of evaluation committees. Practical exercises can be incorporated using sample procurement plans, tender documents and evaluation scenarios.

Course Objectives

- Conduct effective procurement needs assessments.
- Develop comprehensive procurement plans.
- Align procurement plans with organizational budgets.
- Prepare clear specifications and terms of reference.
- Select appropriate procurement and tendering methods.
- Develop effective tender documentation.
- Establish objective evaluation criteria.
- Conduct technical and financial bid evaluations.
- Strengthen tender evaluation governance and documentation.
- Manage the transition from procurement award to contract implementation.

Course Modules

> Module 1: Procurement Needs Assessment
- Identifying organizational requirements
- Needs versus wants analysis
- Stakeholder requirements
- Procurement justification and prioritization

> Module 2: Procurement Planning
- Developing procurement plans
- Budget and procurement alignment
- Procurement packaging
- Procurement timelines and scheduling

> Module 3: Specifications and Terms of Reference
- Technical specifications
- Functional specifications
- Performance-based specifications
- Developing effective terms of reference

> Module 4: Selecting Procurement Methods
- Competitive tendering
- Requests for quotations
- Requests for proposals
- Alternative procurement approaches

> Module 5: Tender Documentation
- Instructions to bidders
- Qualification requirements
- Evaluation criteria
- Contractual and commercial requirements

> Module 6: Managing the Tender Process
- Tender advertising
- Pre-bid meetings
- Tender clarifications
- Tender receipt and opening

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> Module 7: Preliminary and Technical Evaluation
- Bid responsiveness
- Eligibility and qualification
- Technical evaluation methodologies
- Technical scoring and documentation

> Module 8: Financial and Commercial Evaluation
- Price evaluation
- Cost adjustments
- Total evaluated cost
- Commercial responsiveness

> Module 9: Evaluation Governance and Award
- Evaluation committee responsibilities
- Confidentiality and conflicts of interest
- Evaluation reports
- Recommendations and approvals

> Module 10: From Award to Contract Implementation
- Notification and communication
- Contract finalization
- Contract kick-off
- Transition to contract-management arrangements

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