



## The Tender Process

### 1-day course

**This programme can be attended as part of a discounted Contracting Trio\***



*This course combined with our 1-day Contract Management programme also provides tuition for*

**BIFM level 4 qualification unit FM4.21**

*See 'Professional Recognition' section below for details*

### Aim

To give delegates an effective, systematic and professional approach to tendering and the appointment of contractors through the use of good specification and process management.

### Objectives

By the end of this course you will have a sound understanding of:

*The importance of linking FM procurement to business and user needs  
How to approach the market  
Specifying services effectively  
How to develop Requests for Proposals (RFP): process & structure  
How to define outputs and standards  
The use of key performance indicators (KPI's) for effective contract management.  
Managing the tender process including: pre-qualification, pre-tender interviews & negotiations  
Evaluating bids for Value-for-money.  
Short-listing, post-tender clarification and negotiation.  
Contract award, handover and implementation.*

### Description

Too many contracts fail to meet customer expectations due to poor specification, inadequate pre-qualification and tendering procedures. FM contracts are particularly vulnerable. The most effective specifications are those that are developed from pure output and performance criteria at tender stage into contract specifications that incorporate service provider method statements and contain agreed key performance indicators for subsequent contract management. Effective management of the tender process is an essential pre-requisite for a successful value-for-money contract.

### Content

- Understanding the contract cycle
- Preparing to tender
- Working with customers
- Defining outputs and performance standards
- Identifying Critical success factors and key performance indicators [KPI's]
- Developing a specification and a Request for Proposals (RFP)

- Designing-in at contract tendering and negotiation stages the means to manage post contract award
- Evaluating bids for value for money and short-listing
- Post-tender clarification and negotiation
- Contract award and starting on site

## **Programme**

### **0845 Registration, tea and coffee**

### **0915 Welcome and Introduction**

Learning Objectives  
Plan for the day

### **0945 Preparing to Tender**

Defining business requirements  
Market Consultation  
Procurement options  
The Six Phases

### **1030 Tea & coffee**

### **1045 Making Specifications Effective**

Types of specification  
Writing good performance standards  
Performance measurement

### **1200 The Tender Process**

Pre-Qualification  
Invitation to Tender  
Site Visits  
Short listing

### **1230 Lunch**

### **1330 The People Dimension**

When TUPE applies  
Implications of TUPE  
Key Personnel

### **1445 Tea & coffee**

### **1500 Tender Evaluation**

Evaluating tenders  
Scoring and weighting systems  
Shortlisted presentations  
Post Tender Discussion

### **Mobilisation**

Feedback to unsuccessful Tenderers  
Work in Progress  
Contract Start up  
Communicating the Change

### **1600 Discussion**

### **1630 Close**

### **\*Discounted Contracting Trio**

The Tender Process together with our 1-day Contract Management and The Art of Negotiation programmes can be taken as a single 3-day course for a reduced fee.

### **Professional Recognition**

Delegates receive a Quadrilect certificate of attendance which contributes towards their record of CPD [Continuing Professional Development].



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'The Tender Process' is accredited to provide part-tuition for BIFM level 4 qualification unit FM4.21. Please note that this unit **alone** does not constitute a complete qualification. Please contact us on 020 7242 4141 or email [info@quadrilect.co.uk](mailto:info@quadrilect.co.uk) for a qualifications brochure and further guidance on enrolment

#### **How do I book?**

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