KENYA INSTITUTE OF SUPPLIES MANAGEMENT

Promoting Professionalism in Supply Chain Management.

DEVELOPING SPECIFICATIONS AND EVALUATION CRITERIA FOR NON-CONSULTING SERVICES USING THE NEW STANDARD TENDER DOCUMENTS

26TH – 30TH SEPTEMBER, 2022 | 30 CPD POINTS | PRIDEINN FLAMINGO BEACH RESORT, MOMBASA

TARGET GROUP

Public sector organizations' and County procurement and supply chain management Directors, Managers, Officers and Assistants, County Secretaries, Executive Committee Members, County Finance Officers, user departments and other officials involved in the procurement process.

INTRODUCTION

Clear, concise and comprehensive tender specifications ensure procuring entities save on time, cost, and achieve desired outcomes in a bidding process. This workshop provides participants with techniques and strategies for developing successful specifications for non-consultancy services in line with the new standard tender documents. Participants will further be guided on appropriate methodologies for selecting the best supplier. Fundamentals in an evaluation criterion for determining the best response from interested bidders will be highlighted.

COURSE OBJECTIVE

By the end of the workshop participants should be able to:

1. Understand the contents of the Standard Tender Document for procurement of non-consulting services;
2. Appreciate the importance of specification requirements from a procurement perspective;
3. Apply risk mitigation measures in specifications development for enhanced quality and value for money; and
4. Prepare effective Tender Evaluation Criteria for procurement of non- consulting services.

COURSE DESCRIPTION

1. **Overview of the Procurement Process**
   - Procurement Planning
   - Development of Specifications & Requisitioning
   - Preparation of Tender Document
   - Invitation to Bid
   - Clarifications, Submission and Opening of Bids
   - Evaluation of Bids
   - Professional Opinion Writing and Award of Tender
   - Notification of Intention to Enter into Contract
   - Award of Contract, Execution & Contract Implementation
   - Payment & Records Management

2. **Overview of the STD for Procurement of Non Consulting Services**
   - Preface and Guidelines for Preparation of the Tender Document
   - Invitation to Tender
   - Tender Data Sheet
   - Evaluation and Qualification Criteria
   - Tendering Forms
   - Activity Schedule
   - General Conditions of Contract
   - Special Conditions of Contract

WORKSHOP FEES

Members: Ksh. 60,000 + 16% VAT
Non-members: Ksh. 65,000 + 16% VAT

All payments and LPO's should be submitted to KISM a week prior to the workshop.

3. **Introduction to Specification Development**
   - Definition of Specifications
   - Purpose of Specifications
   - Legal Provisions on Specifications Development
   - Characteristics of Specifications
   - Sources of Specifications
   - Types of Specifications
   - Contents and Layout of Specifications.
4. **Organization of Specifications**
   - Audience Analysis
   - Specification Language
   - Unit of Measurement
   - Methods of Specifying Requirements
   - Tools and Techniques of Structuring Specifications
   - Stakeholders involved in Developing Specifications
5. **Specification Development Process**
   - Planning & Analysis
   - Consultation & Information Gathering
   - Writing Specifications
   - Vetting the Specifications & Obtaining Approvals
   - Issuing the Specifications
   - Managing Amendments to the Specifications
   - Revising and Storing the Specifications

   Group Exercise on preparation of specifications for Procurement of Security Guarding Services
6. **Challenges in Developing Specification**
   - Language (Written Communication)
   - Choosing and Using Right Words
   - Understanding Stakeholders Needs
   - Dealing with jargon and unnecessary information
   - Identification of Possible Risks
7. **Introduction to Tender Evaluation Criteria**
   - Definitions
   - Legal provisions on Evaluation Criteria
   - Purpose of Evaluation Criteria
   - Responsibility for Evaluation Criteria Development
   - Types of Evaluation Criteria
   - Application of the Evaluation Criteria
8. **Preparation of Eligibility/Mandatory Tender Evaluation Criteria**
   - Legal Capacity
   - Tax Obligations
   - Financial Capability (Audited Accounts)
   - Debarment, Corruption and Fraud Declarations
   - Numbers of bid documents & Bid Validity
   - Authorization for Signing of Documents
   - Serialization/Pagination
   - Tender Security
   - Company Ownership
   - Trade licence
9. **Prepare of Qualification Criteria**
   - Financial Capacity
   - Past Experience (General and Specific)
   - Equipment for Provision of the Service
   - Key Personnel (Qualifications)
   - Compliance to Technical Requirements
10. **Preparation of Financial & Award Criteria**
    - Price Comparison
    - Application of Margin of preference (where applicable)
    - Lowest Evaluated Cost
    - Most Favourable/Cost Effective Payment Terms
    - Best and Final Offer (BAFO)
11. **Post Qualification Criteria**
    - Access to Financial Resources
    - Average Annual Turnover
    - Contracts Completed in the Past
    - Key Personnel
    - History on non Performing Contracts
    - Pending Litigation & Litigation History
12. **Group Exercise on Preparation of Preliminary Evaluation Criteria, Qualification Criteria, and Financial and Award criteria, Post - Qualification Criteria for Procurement of Security Guarding Services.**
13. **Evaluation and Award of Tenders**
    - Legal Provisions on Evaluation of Tenders
    - Evaluation Procedures
    - Role of the Tender Evaluation Committee
    - Use of the Standard Evaluation Report Template
    - Contents of the Evaluation Report
    - Challenges in Evaluation of Tenders
    - Professional Opinion writing and Award of Tender
14. **Plenary**

COURSE DELIVERY

Sessions are interactive. Delivery will be through PowerPoint presentation, discussions, Q/A sessions, Group discussions and Case scenarios.

WORKSHOP BOOKINGS

Book your space online at **www.kism.or.ke** For further workshop inquiries and registration, call **+254-0769 878 227 / 0111240800** or e-mail **programs@kism.or.ke**

TRAINING CERTIFICATE

A certificate of participation will be issued and workshop Presentations will be sent to participants via e-mail. Members attending the workshop will earn 30 CPD points.

REACH US

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