

2016 ONPHA Conference and Trade Show

503

Tendering: Tips and best practices

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ONPhA



Who is in the room?

Having a good tendering process in place ensures you get the best goods and services at the right time at the most favorable prices, while maintaining open, ethical and transparent processes.

Learn current best practices for tendering in your work and have the opportunity to ask questions to ensure your process is as effective as possible.

Outline

We will cover:

- Types of tenders
- Why do it?
- Tender evaluation
- Best practices
- Questions?



Types of tendering

- Public/open competitive tender
- Pre-qualification tender
- Multistage
- Invitational Tender
- Informal
- Non-Competitive
- Emergency



Types of tendering

- Individual
- Group
- Bulk purchasing



Tender call mechanisms

- Expression of interest (EOI)
- Request for information (RFI)
- Request for proposal (RFP)
- Request for quotation (RFQ)
- Request for tender (RFT)



Why tender?

- Due diligence
- Compliance with (funder/operating/other) requirements
- Keep vendors competitive
- Maintain an understanding of alternatives and options in the market place

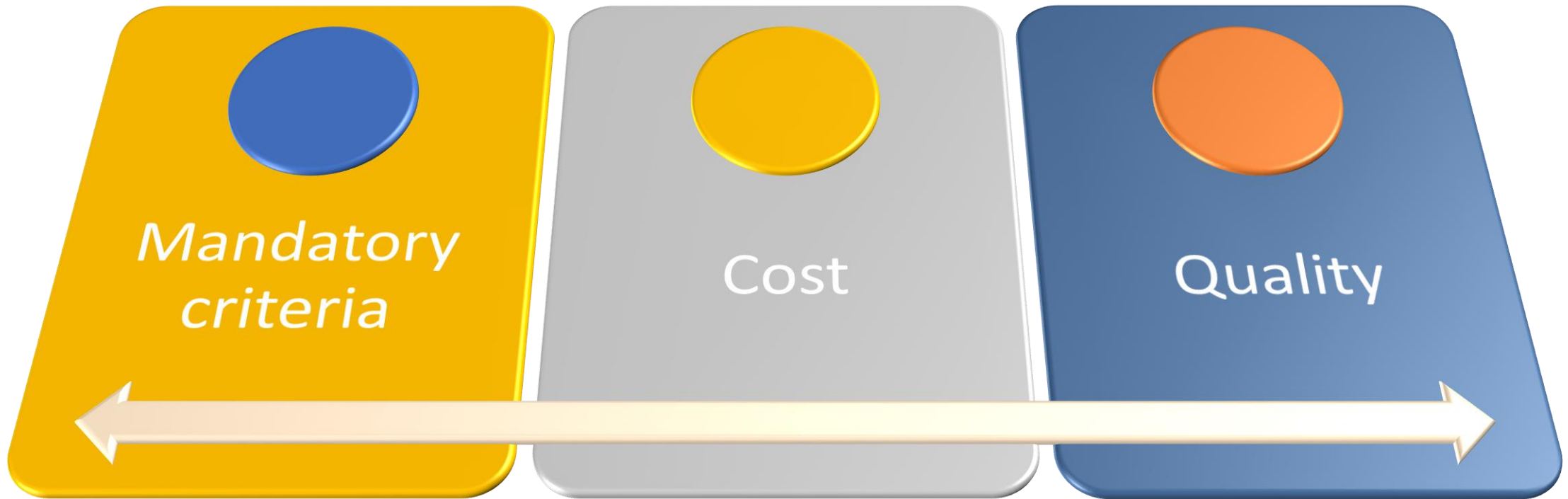


Why tender?

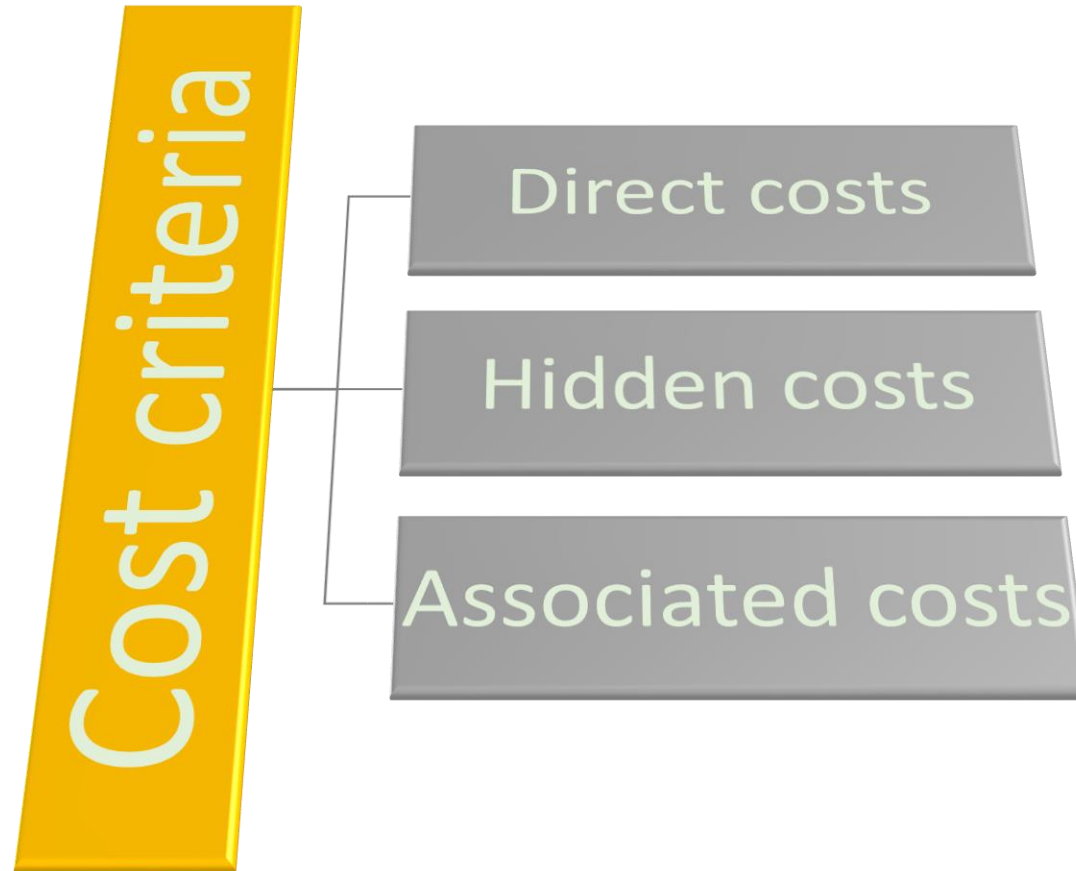
- Ensure current supplier continues to meet needs
- Arrangements are based on your terms
- Involve key stakeholders in selection process for buy in
- more value, through price reductions, better service, higher quality products or other value adds



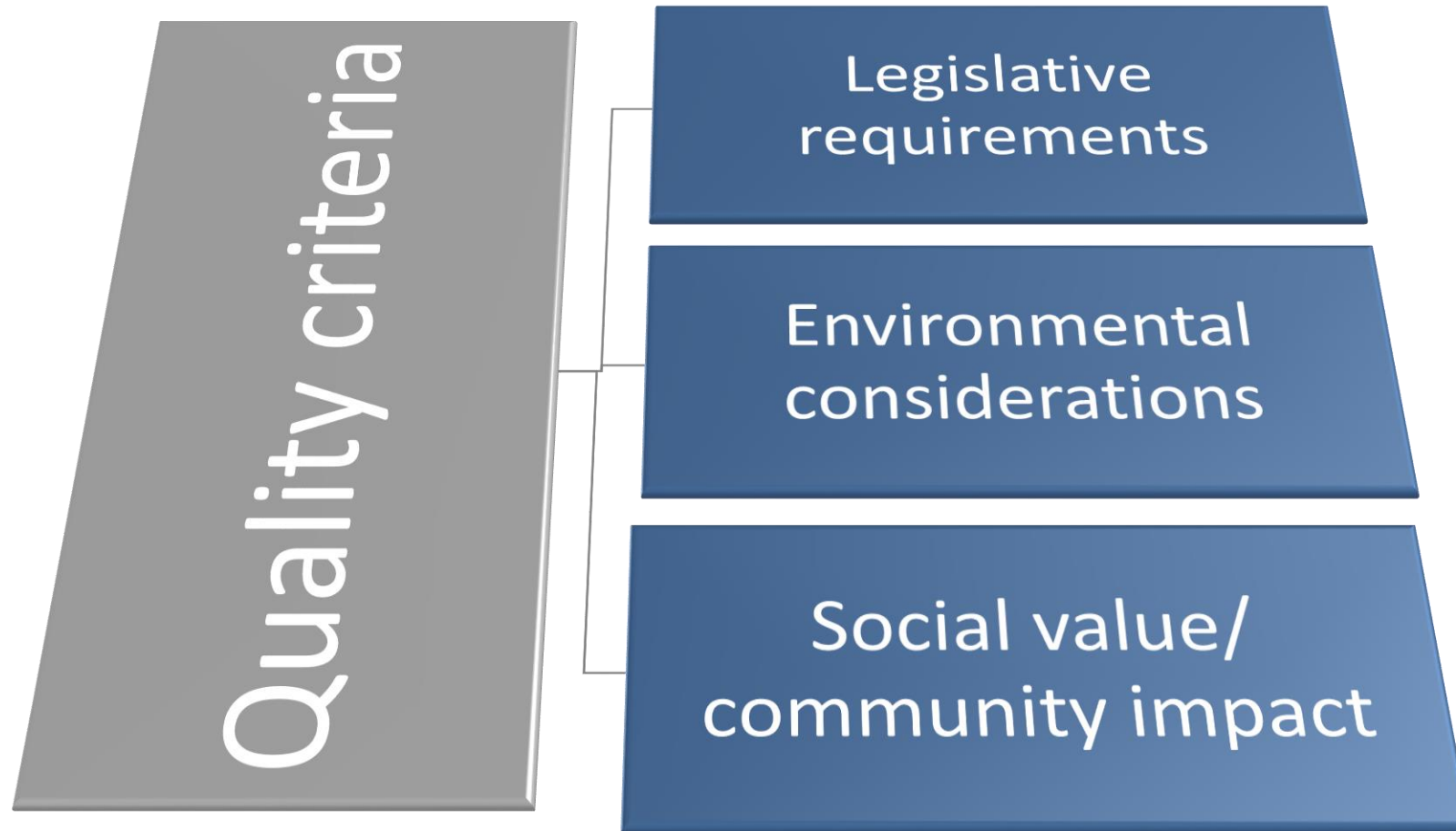
Bid evaluation criteria











Tender evaluation methodology

- Pass/fail
- Rating
- Pricing
- Site visit/ info session
- Questions & answers



Best Practices



Best Practice -before

Do:

- describe your needs with clarity and specifics
- define submission requirements
- define what aspects of performance are included/excluded in the scope of work
- break tender into manageable geographic areas



Best Practice -before

Do:

- not overlook the added services required
- engage all potential stakeholders early in the process
- plan well ahead for long term contracts
- prepare good tender documents
- ensure a contract is signed



Best Practice-during

Do:

- evaluate beyond lowest bid
- ensure there is a transition plan in place (for replacement services)
- ensure there is a method for Board oversight
- make provision for separate contracts for each participant
- have a system for monitoring the work (i.e. health and safety)



Best Practice-after

- document warranties
- monitor contracted work, equipment finishes against warranty
- if necessary, address deficiencies within warranty period
- evaluate the process, contractor/vendor and job
- document evaluation findings



Best Practice -overall

Do:

- know your business
- know relevant and mandatory legislation
- contact ONPHA for tool, resources and help





Resources

www.onpha.on.ca Tendering resources

http://qc.onpha.on.ca/flipbooks/2016_Associate_Member_Directory/index.html



How can ONPHA help you?

1. Visit ONPHA online:

onpha.on.ca

- handbooks and guides
- sample policies
- Info Ons

2. ONPHA Member Support

Hotline: 1-800-297-6660

3. ONPHA Education Program

- Online courses: RGI, RTA, Finance and Governance
- Webinars
- In-person training

4. ONPHA Conference

- Join us in 2017 in Niagara Falls, November 3 - 5

