

**The Tendering Methodology and Timelines outlined below apply to
NUI Galway owned and managed tenders only.**

Tenders outsourced to Office of Government Procurement (OGP) Sourcing Partner are led by these organisations who utilise their own documents and processes, therefore the methodology below may vary and timelines will differ. OGP require 3 months advance notice for all requirements.

This is not intended to be a definitive list.

Background

This document was developed by the Procurement & Contracts Office (PCO) for the purpose of:-

1. Identifying the Stages which every tendering project goes through when being tendered.
2. Assisting all Budget Holders through their tendering processes.

Aim

Provide a standardised approach to Tendering projects within NUI Galway.

STAGE 1: TENDER INITIATION

TIMELINE: 2- 8 WEEKS

1. Initial communication from Budget Holder stating they have a requirement to purchase.
2. PCO create contract on our Database System (Accord) which assigns a unique reference number, which the Budget Holder must use throughout the tendering process.
3. PCO send a Tender Initiation Form to the Budget Holder for completion. These are also available for download on our intranet.
4. PCO schedule a meeting or conference call with the Budget Holder and the Contracts Officer. The Budget Holder brings the final draft of the Tender Initiation Form (TIF) to the Initiation meeting which forms the basis of the discussion.

Other topics covered at the meeting include, if applicable:

- OGP Procurement Policy and its process.
- Profile the purchase and category
 - Agresso expenditure pattern / users (including aggregation)
- If an NUI Galway tender, review external procurement consultant options – dependent on timescales and current workload plan (if relevant)
 - Review and agree which stages are to be outsourced to the consultant
 - Determine suitable outsource support companies
 - Agree timelines and requirements for quotes
 - Quotes and response times to be sent by PCO
 - On receipt of quote responses agree roles, responsibilities and timelines for all involved.
- Overview of process and timelines

- Accord – Procurement Contracts Database System
 - Review the composition of the Tender Evaluation Committee who also must sign both parts of the Initiation Form. For National Tenders, it is recommended a minimum of 2 persons should be involved in the evaluation. For EU Tenders it is recommended a minimum of 3 persons participate in the evaluation team, and best practice suggests that one of the members should be not directly linked to the project.
 - Agree timelines
 - Risk management log (if applicable)
 - Origin of funding and the protocol required (e.g. advertising logos etc.) with the Funder.
 - Receive copy of the funding award letter (must be included with the Tender Initiation Form TIF)
 - If above EU value or Centralised contract - schedule for inclusion in next Finance Resource Committee (FRC) meeting for approval
 - Discussion on saving and benefits to be achieved and report to FRC.
5. Once all of the discussion points above have been agreed, then the Budget Holder gets all relevant signatories and submits the “final version” of the TIF to PCO.
6. PCO complete the PSR Form, issue to the OGP Service Support Desk and await instruction on how the sourcing of the project will be conducted. All PSRs are required by OGP with 3 months’ notice of the required date.
Follow up after 48 hours. Responses from the Support Desk are currently between 2 – 20 working days. Progress is halted at this point until the instructions are received as to how the project will proceed and the identification of the relevant OGP Sourcing Partner has been confirmed.
7. If OGP appoint an OGP Sourcing Partner, then they will prepare a Project Plan for the Budget Holder which incorporates agreed timelines etc.
8. IF OGP permit NUIG to take ownership of the tendering process, PCO will schedule timelines with Budget Holder.
9. Where NUIG Budget Holder engages an external procurement companies (with agreement of PCO) to assist with the tendering process, then the outsourced consultant must sign a Confidentiality/Conflict of Interest Form and this must be submitted to PCO for audit purposes.
10. All final dates and documents are updated to Accord to close off this stage.

ANY EXCEPTIONS/DEVIATIONS FROM ABOVE HAVE TO BE APPROVED BY THE HEAD OF PCO

STAGE 2: USER REQUIREMENTS

TIMELINE 2-4 WEEKS

This stage centres on the development of the Specification of Requirements:

For NUIG tenders:

1. PCO issue the relevant tender templates to the Budget Holder for completion.
2. Market Analysis (where applicable) can be conducted at this point.

- Including internal and external market research
3. Budget holder is required to build the technical requirements section of the tender document
 4. PCO build the suite of tender documents to make it market ready.
 5. A meeting between PCO and Budget Holder may be required at this point to finalise documents.
 6. PCO actions include:-
 - Open Procedure - Review the final tender document received from Budget Holder and amend where applicable.
 - Get final approval from Budget Holder to move to next stage.
 - Restricted Procedure - Build PQQ (define eligibility/qualifying criteria with pass/fail rules).
 - Draft PQQ documents are then issued to the Budget Holder for review and completion. Once final agreement is reached the PCO then develop the PQQ Evaluation Template based on the RFT.
 - Seek final approval from Budget Holder on all PQQ stage documents.
 - Finalise RFT / Evaluation Template with assistance of Budget Holder
 - Seek final approval from Budget Holder on all RFT stage documents

For Outsourced Tenders:

1. The OGP Sourcing Partner will provide the necessary templates for budget holder completion to define requirements. PCO will act as liaison between the OGP Sourcing Partner and budget holder.
2. Budget Holder is required to complete the technical requirements section of the tender document.
3. The OGP Sourcing Partner will agree tender award criteria with the Budget Holder.
4. The OGP Sourcing Partner builds the suite of tender documents to make it market ready.
5. A meeting/conference call between the Budget Holder, PCO and OGP Sourcing Partner may be required at this point to finalise documents.

All final dates and documents are updated to Accord to close off this stage.

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STAGE 3: ADVERTISEMENT

TIMELINE 3 – 8 WEEKS

For NUIG Tenders:

1. PCO publish the Contract Notice on final approved tender documents on etenders and OJEU as appropriate.
2. The budget holder or nominee is setup with access to eTenders so that they can monitor supplier interest in the tender and also for the tender opening.

3. PCO schedule tender opening meeting with team, Budget Holder and PCO attend the Official tender opening in PCO Office.
4. Budget Holder / PCO notify incumbents, if applicable.
5. PCO will liaise with Budget Holder to respond to clarifications from interested parties
6. After tender deadline, the etenders postbox is “unlocked” by the budget holder and PCO to provide access to the tender submissions. The etenders tender opening record is printed and signed by those in attendance at the meeting.

For Outsourced tenders/Mini Competitions:

The OGP Sourcing Partner will manage all etenders processes during the advertisement stage. NUIG will not have access to the contract on etenders.

1. The OGP Sourcing Partner will publish the Contract Notice and final approved documents on eTenders/OJEU (as appropriate).
2. Alternatively, for mini-competitions, the OGP Sourcing Partner will issue the tender documents directly to the framework candidates in most instances.
3. Budget Holder / PCO notify incumbents, if applicable.
4. The OGP Sourcing Partner will liaise with PCO and Budget Holder and will respond to clarifications from interested parties
5. The OGP Sourcing Partner will manage the tender opening process.
6. For mini-tender competitions conducted directly by NUIG, the Mini-Tender Opening Record template will be used, which is then signed by those in attendance.
7. All final dates and documents are updated to Accord to close off this stage.

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STAGE 4: EVALUATION AND CLARIFICATION

TIMELINE 3 – 20 WEEKS

For NUIG Tenders:

1. Evaluation of Eligibility/Qualification Criteria - Initially evaluation takes place by the PCO covering the legal and financial capacity. The technical qualifications and experience are then evaluated by Budget Holder and Team.
2. For restricted procedure, PCO will draft and issue supplier regret letters and letters to shortlisted suppliers.
3. Stage 2 - Tender Award Criteria is evaluated by Budget Holder and Tender Evaluation Committee using the customised template documents. Where there is identifiable owners of the contract, the PCO staff are not directly involved in the evaluation committee other than to offer guidance in relation to process only.
4. Savings/Benefits achieved from the tender must be addressed in Evaluation Report – these can be explored and discussed with PCO.
5. Final draft of Evaluation Report is provided to PCO for review. Once agreed then sign off is required by all Evaluation team, and submitted to PCO.
6. To conclude this stage it is necessary to have an Evaluation meeting/conference call with all participating stakeholders.

For Outsourced Tenders:

7. Evaluation of Eligibility/Qualification Criteria - Initially evaluation takes place by the OGP Sourcing Partner covering the legal and financial capacity. The technical qualifications and experience are then evaluated by Budget Holder and Team.
8. For restricted procedure, the OGP Sourcing Partner will draft and issue supplier regret letters and letters to shortlisted suppliers. Letters are prepared by the OGP Sourcing Partner and final drafts supplied to PCO for review. Once finalised, the OGP Sourcing Partner will issue the letters to suppliers.
9. Stage 2 - Tender Award Criteria is carried out by OGP Sourcing Partner in consultation with the evaluation team.
10. For Open/Restricted Procedures, commercial terms may be withheld by the OGP Sourcing Partner until the technical evaluations are completed.
11. Final draft of Evaluation Report is provided by the OGP Sourcing Partner to PCO for review. Once agreed then sign off is required by all Evaluation team and submitted to PCO
12. To conclude this stage it is necessary to have an Evaluation meeting/conference call with all participating stakeholders.

All final dates and documents are updated to Accord to close off this stage.

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STAGE 5: TENDER AWARD

TIMELINE 2-4 WEEKS

For NUIG Tenders:

1. PCO draft and issue supplier regret letters.
2. PCO draft and issue official award letter in consultation with Budget Holder.
3. If contracts require an SLA or Framework Agreement, the appropriate template will be used to prepare these. PCO with agreement of successful bidder and Budget Holder will agree the final SLA and seek relevant signatories.
3. If tendering, a 14 day standstill period must be adhered to for all EU contracts.
4. For mini-competitions, depending on the framework, a standstill period may apply.
5. For centralised contracts, PCO Schedule supplier implementation meetings (for when standstill period expires).
7. For certain recurring contracts, PCO will schedule year 1 of review meetings for all parties.
8. PCO publish contract award notice on the etenders regardless of value.
9. For once off tenders, PCO issue final close off email to Budget Holder to confirm conclusion of procurement process and to remind next steps for Budget Holder which include; raising the official purchase order, receive delivery and GRN on system, authorise invoice, manage supplier, retain full tender records for audit purposes. Copy of Purchase order to be supplied to PCO where requested.
8. On conclusion of the competition, all final award details and terms are recorded on Accord. The budget holder will receive automatic email alerts for the review, renewal or extension of contracts as required. The budget holder and PCO will liaise to complete the required actions.

For Outsourced tenders:

1. The OGP Sourcing Partner draft, sign and issue regret letters to unsuccessful suppliers once they have been reviewed by PCO.
2. The OGP Sourcing Partner draft the award letter and issue to the PCO for completion. PCO sign and issue award letters directly to suppliers.
3. If tendering, a 14 day standstill period must be adhered to for all EU contracts.
4. For mini-competitions, depending on the framework, a standstill period may apply.
5. If contracts require an SLA or Framework Agreement, the appropriate template will be used to prepare these. PCO with agreement of successful bidder and Budget Holder will agree the final SLA and seek relevant signatories.
6. The OGP Sourcing Partner publish contract award notice on the etenders/OJEU as appropriate.
7. On conclusion of the competition, all final award details and terms are recorded on Accord. The budget holder will receive automatic email alerts for the review, renewal or extension of contracts as required. The budget holder and PCO will liaise to complete the required actions.

All final dates and documents are updated to Accord to close off this stage.

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STAGE 6: CONTRACT IMPLEMENTATION

TIMELINE 2-10 WEEKS

1. Report Award of contract (including Savings/Benefits report) to FRC for above EU contracts
2. Launch contract where applicable including contract webpage, supplier web portals, notification to staff via email, and arrange a supplier road show/briefing session for suppliers. This is done by PCO staff.
3. PCO arrange an implementation meeting with new supplier(s) covering the usual topics e.g. marketing on site, PO/invoice requirements. Present an electronic copy of our campus directory, and our required monthly usage reporting templates (where applicable).
4. New Supplier(s) setup form for completion on Agresso, if applicable.
5. All final dates and documents are updated to Accord to close off this stage.

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STAGE 7: CLOSING A PROJECT

TIMELINE 2-4 WEEKS

1. Log lessons learned
 2. Quality assurance check (Internal audit) where applicable.
 - Review shared folder files
 - Ensure signed documents have been obtained and filed
 - Ensure tender award notice is published on OJEU (if applicable)
 - Ensure all final documents are uploaded to Accord.
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STAGE 8: CONTRACT MANAGEMENT**LIFE OF PROJECT**

1. For once off contracts: issue Customer Satisfaction Survey to Budget Holder approximately 30 days after conclusion of the tender to ascertain level of satisfaction with their tendering experience and also with the product or service procured.

Centralised/Recurring Contracts:

2. Ensure supplier Usage reports are being received
3. An automatic email alert will issue to the budget holder/PCO from Accord as a reminder to schedule supplier Performance Review Meetings. Budget holder will ensure the appropriate attendees from NUIG
4. Review periodically where further efficiencies can be created thereby producing further savings
5. Requirement Review of Core service/product list (amend as the market determines).
6. Supplier relationship management – Year one of a centralised contract above EU, quarterly reviews discussing the Quarterly customer survey results that was sent to targeted stakeholders. An automatic email alert will issue from Accord.
7. PCO are the escalation for unsatisfactory service – where users have initiated the complaint directly with the supplier and have been unable to get a satisfactory conclusion.