




Promoting excellence through procurement training

Greenville Training Programme

January – June 2019



GREENVILLE
Procurement Intelligence



Public Procurement is at the core of every public service delivered by the public sector in Ireland. The focus on procurement is at an all-time high with the need for compliance, transparency and professionalism. Public organisations are required to resource and manage their procurement functions effectively. The procurement environment is constantly evolving due to emerging case-law, national guidelines and internal organisational focus and accountability.

All staff tasked with responsibility for delivering against corporate procurement objectives must be fully armed with the full range of procurement tools to manage the three key procurement challenges of compliance, value for money and risk.

Greenville Procurement Partners Ltd (formerly the Achilles Procurement Services consultancy and training business) offers a range of specialist training courses via open and in-house training programmes to support procurement professionals to meet the organisational goals. Our series of courses can be delivered on an open basis or customised for an in-house solution tailored to suit each organisation's specific needs. Programmes range from 1-2 day to 8-10 days depending on specific staff/organisational needs.

The Greenville Training Team comprises a team of experts with public, private, national and international procurement experience.

Jeanne Copeland specialises in the best practice implementation of the rules, having developed and delivered material on a wide range of programmes with particular focus on procurement strategies, complex documentation and operation of compliant procurements aligned to national and EU procurement procedures.

Liz McCarthy has many years' experience in the award and management of complex infrastructure projects. She is a leading expert in the day-to-day use of the CWMF (Capital Works Management Framework) suite of documentation employed for the award of consultancy and construction projects. Her in-depth operational knowledge and personal style allows her to offer insightful and instructive training in this complex area.

Harry Kettle employs a practical approach to procurement, particularly in the significant opportunities presented through outsourcing service contracts and developing procurement strategies, handling TUPE and developing costing models. He is adept in transferring his skills on negotiation and awarding of service concessions, particularly relevant now under the Concessions Directive.



Michael Swan brings a focussed approach to the award of supplies and services, in addition to development of effective strategies which facilitate maximum supplier participation. He has many years' experience as a practitioner and trainer in the procurement field on both informal and certified training programmes.

Rob Thompson has extensive international experience in strategic and operational procurement. His expertise encompasses the construction, design and implementation of reform programmes for both public and private procurement organisations operating the EU, World Bank and EBRD procurement regimes.

Lionel McCarthy is an associate EU advisor and trainer to Greenville. He is a specialist in EU and national legislation, and European and Irish case law, with over 30 years' experience of operational and strategic procurement. He is an expert in the practical application of the rules to the diverse range of everyday procurement problems.

Summary of Courses

Introductory Courses

- 1/2 day: Introduction to eTenders
- 1 day: Introducing Public Procurement

Some Knowledge Required

- 1 day: Managing a Full Tender Process Including Templates
- 1 day: Implementing Contract Management
- 1 day: Evaluating Tenders and Writing Letters

- 1 day: Specification / No Specification – How to Proceed
- 1 day: Establishing and Operating Framework Agreements
- 2 day: Understanding European Public Procurement Rules

A customised course for the Experienced Professional

- 2-day: Advanced Public Procurement



Introduction to eTenders

This programme will provide participants with the skills to use the eTenders website for the publication of national and EU notices to ensure fully compliant tender processes including the requirement for electronic issue and receipt via the tender postbox. It will explain in detail the various procedures and features of creating a Workspace and RFT.

Target Audience

This course is ideal for those with a basic knowledge of procedures and the procurement concepts, tasked with responsibility for completing and publishing notices for their organisation, posting queries and uploading and receiving documentation.

Learning Outcomes

On completion of this course participants will be equipped with the knowledge to log-on to the site; set up and publish national and EU notices; upload and receive responses electronically and undertake all communication with suppliers via the system.

Course Content

- Overview of the eTenders system
- The requirements for Electronic Procurement
- Creating and operating Workspaces
- Creating RFTs
 - The key procedures available including Open, Restricted, Quick Quotes, Mini-Competitions, etc.
 - The content of notices, particularly at EU level
 - Publishing RFTs at national and EU level
- Communicating using the electronic tools
 - Issuing documents
 - Handling clarifications
 - Issuing and receiving formal submissions
 - Opening responses online
- Questions and Answers

Introducing Public Procurement

This course is designed for participants who have little, or no, previous experience in public procurement. It aims to provide a foundation of the key terms, processes and activities necessary to undertake a successful procurement. It will provide a sound background of knowledge and practice to allow the participant to interact and effectively assist public procurement projects particularly at national tender levels.

Target Audience

This course is designed for participants who are new to the field of public procurement with no prior experience who wish to develop their knowledge and skills to enable them to operate effectively in a procurement or user department.

Learning Outcomes

On completion of this training, the participant will have acquired knowledge of the key terms and processes in addition to understanding public procurement and its application, particularly at national level. They will also develop greater confidence and the essential skills to become a valued member of the procurement team within their contracting authority.

Course Content

- What is Public Procurement?
- Government Circulars and the Guidelines of July 2017
- When does procurement apply?
- Defining the type of procurement using CPV codes
- Examining the Procedures, Timescales and Financial Thresholds
- Quotations versus Tenders
- Open versus Restricted Procedures
- Understanding the key components
 - The Specification
 - Criteria for selection
 - Award criteria
- Evaluating Tenders
- The award and conclusion stages
 - Notification letters
 - Award notices
- Records to keep
- Question and Answers

Managing a Full Tender Process Including Templates

This programme will explain the basic documents to be included in a full tender process to ensure that each step of the procurement is properly managed. A comprehensive pack of templates will be provided covering the tender documentation as well as the administrative paperwork of registers and evaluation sheets. A review of OGP templates for Goods and Services will be included.

Target Audience

This course is ideal for those within a procurement section tasked with running a full procurement at national and EU levels. It is structured to provide an overview of the rules in the morning with a comprehensive exercise in the afternoon utilising the suite of templates provided.

Learning Outcomes

On completion of this course participants will be equipped with the knowledge to confidently assemble a comprehensive set of procurement documents for the operation of an effective procurement, suitable for compliant operation of an award process which fully meets audit requirements.

Course Content

- Overview of the Procurement Rules
- Defining the need and drafting good specifications
- Selection criteria and the Qualification Phase
- Award criteria
- The key components of a tender document
- The key elements of the OGP templates for Goods and Services
- Notices at national and OJEU level
- Evaluations
 - Expressions of Interest
 - Tenders
- Evaluation Sheets and Records
- Letters of Regret and Award
- Tender Report Forms
- Recommended File Structure
- Retention of Documentation
- Evaluation Exercise
- Questions and Answers



Specification / No Specification – How to Proceed?

The specification is the single most important component in procurement and the maxim applies “the better the specification, the better the result”. This 1-day workshop will provide delegates with the tools to construct a procurement which facilitates innovation and enables effective specification writing.

Target Audience

Those staff tasked with drafting the key features of the tender document: drafting the specification of requirements to ensure the specification delivers against the needs of the organisation. It is focussed on staff tasked with drafting specifications for supplies and services.

Learning Outcomes

Participants will develop a full appreciation of the importance of developing a robust specification, the options to ensure maximum flexibility and the procurement tools available to assist in the process.

Course Content

- Determining the needs of the organisation
- Internal review and consultation
- The role of the specification
- Technical dialogue / market consultation as a mechanism for undertaking market soundings
- Ensuring bias is eliminated
- Using variants – what they are and how to implement in a specification
- Effective ways of drafting a specification
- Review of sample specifications – good and bad
- The role of the Competitive Dialogue procedure where it is not possible to draft a specification
- Positioning innovation and sustainability at selection, specification and award stages
- Summary of EU court cases relating to specifications
- Evaluating tenders and innovative solutions
- Evaluating variants
- Questions and Answers



Establishing and Operating Framework Agreements

This programme will give experienced procurement professionals a fuller understanding of when and how framework agreements can best be used. It explains the mechanisms for establishing framework agreements and deciding whether single or multiple operator frameworks are appropriate in any given case. It will also provide delegates with an understanding of how to operate centrally established frameworks in line with Circular 16/13.

Target Audience

This course is ideal for those new to procurement tasked with establishing their own frameworks or using those set up by Central Purchasing Bodies such as Office of Government Procurement.

Learning Outcomes

On completion of this course participants will be equipped with the skills to understand the difference between contracts and frameworks, the key elements required in setting them up and how to award contracts under them, whether via cascade, mini-tender or other processes.

Course Content

- Introduction
- Deciding on the most appropriate procurement strategy to ensure flexibility
 - Contracts
 - Contracts with Options
 - Framework Agreements
- Overview of the procurement rules for establishing frameworks
- Framework strategies
 - Choosing single versus multi party
 - The key documentation required for frameworks
 - Pricing strategies in frameworks
 - Award criteria and frameworks
 - Awarding frameworks and notifications required
 - Operating the framework
 - Cascade procedure
 - Mini-tender procedure
 - Notification letters in frameworks
 - Award notices for frameworks
- Dos and Don'ts with frameworks
- Frameworks established by Central Purchasing Bodies
 - Using frameworks set up by others
 - What to watch for
- Case Study
- Questions and Answers

Evaluating Tenders and Writing Letters

This programme will provide participants with an understanding of the risks to be managed in evaluation of tenders, the records to be kept, the content of compliant notification letters and the information required throughout the process. Participants will be provided with a checklist for evaluation along with template evaluation sheets and notification letters. The programme will also cover the requirement for evaluation of questionnaires under the restricted procedure.

Target Audience

Those staff tasked with participating in tender and applicant evaluations and particularly with the responsibility for drafting compliant notification letters.

Learning Outcomes

Following this programme, participants will understand the key risks in tender evaluation, the importance of award criteria and the level of detail required to draft compliant and effective notification letters, in addition to ensure procurement files meet audit and best practice procurement standards.

Course Content

- Introduction
- Preparation work required
- Understanding risks to be managed
- The evaluation team – roles and responsibilities
- Evaluation of applications / questionnaires
 - Evaluating selection / eligibility criteria under restricted procedures
 - Information to be recorded / signatures required
 - Content of letters to unsuccessful applicants/candidates
- Evaluation of tenders
 - Scoring qualitative award criteria
 - Scoring cost
 - Recording reasons and features
 - Responsibility for filing / signatures
- Handling clarifications during the evaluation process
- Determining admissible / inadmissible tenders
- Content of notification letters to successful and unsuccessful tenderers
 - What to include in notification (award and regret) letters
 - Standstill period
- Rules on communication and debriefing
- Types of letters required for inadmissible tenders / establishment of frameworks
- Case Study
- Questions and Answers



Implementing Contract Management

This programme aims to equip participants with the tools to manage contracts. It will highlight the key risk areas to be managed in ensuring contracts run effectively. It will provide a comprehensive understanding of the Service Level Agreement (SLA) concept; A Case Study will be used to embed the learnings.

Target Audience

This course is ideal for those experienced in procurement tasked with management and delivery of supplies and services contracts and with ensuring suppliers / service providers deliver on their commitments.

Learning Outcomes

On completion of this course participants will be equipped with the skills to draft customised SLAs, clearly understanding the benefits which accrue from use of SLAs as a tool in maximising the return from proactive contract management.

Course Content

- Introduction
- The Contract Management Process
 - Service delivery management
 - Contract management – roles and responsibilities
 - Contract administration
 - Continuous improvement
 - Variations and change control
 - Contract completion
- Contract Management Documentation
 - Developing a contract management plan
 - Developing a communication plan
 - Drafting a service provider assessment report
- Performance and Operational Management
 - Key Performance Indicators
 - Project reporting
 - Procurement best practice
- Using Service Level Agreements
 - Key Performance Indicators
 - Uses and suggested content of SLAs
 - Advantages of SLAs
 - Mechanisms for dealing with poor performance / managing disputes
- Case Study
- Question and Answer Session

Understanding European Public Procurement Rules

This programme, which has been the cornerstone of our procurement training for nearly 20 years, will provide a detailed analysis of the requirements of the Public Sector Directives and the corresponding Irish regulations. It has been fully updated to take account of Directive 2014/24/EU for the Public Sector and summarise key requirements of Directive 2014/23/EU covering Concessions, in addition to the latest national guidelines issued by the Department of Public Expenditure and Reform in July 2017. Emphasis is placed on the key features and risk areas linked to the procurement cycle from specifications, advertising, setting selection and award criteria, evaluations and notifications.

Target Audience

As our flagship course, this two-day programme is designed as an essential building block for those involved on a regular basis in procurement who need to understand the detailed requirements for effectively running a fully compliant procurement process. It is an ideal follow on to the Introducing Public Procurement course and provides participants with the much sought after procurement manual which has become the “go-to” reference document for many of our students.

Learning Outcomes

On completion of this course, participants will be equipped with a clear understanding of the key requirements for compliance with national and EU procurement regimes and the skills necessary to carry out contract award procedures successfully using the primary procedures of open and restricted tendering.

Course Content

- Rules and Principles
- Key Government Circulars including the July 2017 circular
- Defining Supplies, Works and Services including Title III services
- Thresholds and calculating contract values
- Rules on Specifications
- The key Procedures and Timescales
 - Open
 - Restricted
 - Urgent
- Frameworks, Panels and Dynamic Purchasing Systems
- National and OJEU Notices
- Choosing the best selection criteria
 - Setting weightings and minimum levels
 - Evaluating criteria under various procedures
- Setting award criteria and weightings
 - Tender evaluation including scoring cost
 - Scoring and records to be kept
- Remedies and Standstill and Notification letters
- Article 84 Reports
- Case Studies
- Questions and Answers



Advanced Public Procurement

This new programme is designed to meet the demands of our students to further their knowledge and expertise on the more complex nuanced features of the Public Procurement Regime, whether for the public sector or utilities. It will address the more infrequently used procedures such as competitive dialogue, competitive procedure with negotiation, innovation partnership, procedures involving negotiation (for Title III/Service Concessions) as well as features such as modifications to contract post award, derogations from competition and handling complex clarifications. It will also refer students to key jurisprudence which guides our understanding of some of the more difficult questions faced by procurement professionals.

Target Audience

Experienced procurement professionals who have successfully managed full tender processes under the open and restricted procedures who are keen to build on their skills and expertise and gain confidence in responding to the more complex queries which arise from time to time.

Learning Outcomes

On completion of this training, the participant will have acquired knowledge of how and when to use competitive and negotiated procedures, manage clarifications, modifications and negotiations as tools in facilitating successful contract awards. They will also have access to the jurisprudence backing up how to respond to abnormally low tenders, inadmissible tenders and other complex issues.

Course Content

- Introduction
- Deciding on when to use the following procedures and what they involve
 - Competitive Dialogue
 - Competitive Procedure with Negotiation
 - Innovation Partnership
 - Designing Procedures involving Negotiation (for Title III/ Concession Services)
- Handling clarifications at each stage of the tender process
 - Who to invite, what to discuss
 - During qualification / tender stage
 - Post award
- The modification process:
 - The allowable increases under the directive
 - The circumstances for applying the 50% rule
 - Drafting and Completing Modification Notices
 - Circumstances where modifications are not allowed
- Derogations from competition
 - What to do with irregular or unacceptable tenders (Art. 26);
 - What to do with unsuitable tenders (Art. 32)
 - Drafting and Publishing VEAT notices
- Inadmissible applicants and tenders
- Abnormally low tenders
- Strategies for future proofing procurement
 - Contracts with options on Projects – services and works and Article 32, where options can be negotiated
 - Contracts with options – where options are identified and catered for in original tender
 - Frameworks
- Case Study
- Question and Answers







Other Training Options

In-House Training

In addition to our standard programmes detailed in this brochure, we can run such programmes on an in-house basis, which can sometimes prove more cost effective where organisations have teams of personnel to be trained. We do however emphasise the benefit of networking with peers gained through participation in our open programmes.

Other Options

Based on sufficient demand, we can also deliver open / in-house training on the following topics:

- 1/2 day – eTenders for Utilities
- 1-day – Framework Agreements for Utilities
- 1-day – Conditions of Engagement for recruitment of engineering consultants
- 1-day – Use of CWMF for works and related contracts – short form, minor works, term maintenance, framework agreements, etc.
- 1-day and 2 day programmes – Negotiation Skills
- 2-day – Understanding Procurement Rules for Utilities

Modular Programmes

Greenville can also design and develop customised in-house modular programmes to be delivered over a period of weeks or months on the basis of a series of 1/2 day or 1-day modules.

Accredited Programmes

We also deliver NUI accredited training via the Institute of Public Administration. We currently operate two accredited programmes.

- The Certificate in Public Procurement (CPP) an 11-day programme delivered over 6 months (Level 6 Special Purpose on the National Framework of Qualifications).
- The Professional Diploma in Public Procurement (PDPP) an 11-day programme delivered over 6 months (Level 8 Special Purpose on the National Framework of Qualifications).

Please contact the IPA or ourselves for more information on the syllabus, dates, etc.

How to book

To book a place on a course or for further information on the latest course dates, please contact: Jackie Magrath, Training Manager

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