JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Tender Opening and Bid Compliance Screening Training Course

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

Tender Opening and Bid Compliance Screening Training Course

Tender Opening and Bid Compliance Screening is a 1-week training course for tender committee members, procurement officers and contract staff, built around a bid compliance screening register that tracks each submission to award. Public bodies and private buyers face closer scrutiny of how sealed bids are received, opened and checked, so a clean procedural trail now decides whether an award survives challenge. Jupiter Prime Training delivers this course.

Why Tender Opening and Bid Compliance Screening Matters Now

Three forces shape tender opening and bid compliance screening today. Electronic portals have moved opening sessions into time-stamped systems. Unsuccessful bidders increasingly ask for debriefs and lodge complaints, testing every rejection decision. Audit and oversight teams expect each mandatory requirement, clarification and disqualification to be traceable. Consistent screening speeds awards; improvised screening risks cancelled tenders and lost supplier trust. The course rests on established public procurement principles of transparency, equal treatment and proportionality.

Who Gains Most from Tender Opening and Bid Compliance Screening

- Officers who prepare tender packs, instructions to bidders and returnable schedules
- Committee members who attend bid opening sessions and sign opening minutes
- Evaluators who check mandatory requirements before technical and commercial scoring
- Contract staff who handle bidder clarifications and the clarification log
- Secretaries of tender boards who keep the tender file and award records

A tender board or procurement unit gains most when its opening, screening and evaluation members attend together and agree one shared screening routine.

Tender Opening and Bid Compliance Screening Capabilities

Participants practise the procedural checkpoints that sit between bid receipt and an award recommendation, where most challenges begin.

- Design instructions to bidders and returnable schedules that make compliance checkable — tender board approval
- Apply a sealed bid receipt and opening routine with signed minutes — audit and oversight reviewers
- Specify pass or fail gateway criteria separate from scored criteria — evaluation committee chairs
- Test submissions for material and minor deviations and seek clarification fairly — bidders and legal advisers
- Calculate weighted technical and commercial results from screened bids — the award decision

- Build an award report and debrief notes that explain each rejection — unsuccessful bidders

Key Tender Opening and Bid Compliance Screening Terms

- Bid opening session — The formal recorded event at which sealed or electronic submissions are opened, read out and listed in minutes.
- Responsive bid — A submission that meets every mandatory requirement of the tender documents without a material deviation.
- Material deviation — A departure from the tender documents that changes scope, quality, risk or price.
- Gateway criterion — A pass or fail requirement checked before scoring, such as a signed form of tender or valid bid security.
- Clarification log — A dated record of bidder questions, buyer answers and requests to explain a submission.
- Abnormally low tender — A price so far below the estimate or other bids that the buyer must ask the bidder to justify it.

Tender Opening and Bid Compliance Screening Day by Day

Day 1: Tender Planning and Procedure Choice

- Procurement Route Selection Matrix — Open, Restricted or Negotiated Procedure
- Tender Timetable and Submission Window — Fair Time for Bidders to Respond
- Pre-Estimate and Budget Envelope — Reference Point for Price Screening
- Conflict of Interest Declarations — Independence of Committee Members
- Tender File Index — Traceable Records from Notice to Award

Day 2: Tender Documents and Bidder Clarifications

- Instructions to Bidders Structure — Clear Rules for Valid Submissions
- Returnable Schedules and Forms of Tender — Checkable Bid Content
- Bid Security and Validity Period Clauses — Protection Against Withdrawal
- Clarification Log and Addenda Control — Equal Information for All Bidders
- Site Visits and Pre-Bid Meetings Minutes — Consistent Answers on Record

Day 3: Bid Receipt, Opening and Gateway Screening

- Sealed Bid Receipt Register — Late and Misdirected Submission Decisions
- Electronic Portal Opening Controls — Time Stamps and Access Rights
- Opening Minutes and Read-Out Sheet — Witnessed Record of Prices
- Gateway Criteria Checklist — Pass or Fail Before Any Scoring
- Material Versus Minor Deviation Test — Rejection or Clarification Request

Day 4: Weighted Technical and Commercial Evaluation

- Technical Scoring Scale and Descriptors — Consistent Marks Across Evaluators
- Price Scoring Formulas and Normalisation — Fair Commercial Comparison
- Arithmetic Error Correction Rules — Corrected Totals and Bidder Confirmation
- Abnormally Low Tender Justification Request — Price Realism Decision
- Moderation Meeting Record — Agreed Scores and Recorded Dissent

Day 5: Practising the Bid Compliance Screening Register

- Gateway Checklist Applied to a Sample Tender — Responsive Bid List
- Weighted Evaluation Model Run on Screened Bids — Ranked Result
- Award Report Drafting — Recommendation to the Tender Board
- Debrief Letter for Unsuccessful Bidders — Reasons and Relative Scores
- Bid Compliance Screening Register Completion — Audit-Ready Tender Record

Applying Tender Opening and Bid Compliance Screening After the Course

- Rebuild the gateway criteria checklist for the next live tender, separating mandatory from scored requirements.
- Run the next bid opening session with a read-out sheet, signed minutes and a receipt register.

Tender Opening and Bid Compliance Screening Questions FAQ

What is tender opening and bid compliance screening and why does it matter now?

It is the procedure for receiving, opening and checking bids against mandatory requirements before scoring. Portals, complaints and audits now test whether each rejection can be traced.

Which roles gain most from tender opening and bid compliance screening?

Tender committee members, procurement officers, evaluators and contract staff gain most. You benefit most if you sign opening minutes, judge responsiveness or prepare award reports.

How does tender opening and bid compliance screening differ from a negotiation or bid writing course?

It focuses on the buyer's procedural checkpoints, not on negotiating terms or writing proposals. You work on receipt, opening, gateway screening, deviations and weighted evaluation.

What do you bring back from tender opening and bid compliance screening?

You bring back a completed screening register for a sample tender, with a gateway checklist, evaluation model, award report and debrief letter.

Tender Opening and Bid Compliance Screening: The Way Forward

The bid compliance screening register gives a tender board one record of every submission, its gateway result, deviations, clarifications and final score. Its first use informs which bids go forward to scoring. Secretaries, evaluators and auditors rely on it. After the first tender, revisit how gateway criteria were drafted, since most rejections trace back to unclear instructions to bidders.