Welcome

Contractor Prequalification

Practical, Efficient and Effective Solutions

Making your contractor prequalification process even better
Has this happened to You?

Congratulations on your New Project
The project timeline is tight so we need to get a Contractor on board quickly. Who can do this work?
These are the Contractors who responded to our expression of interest.
Another evaluation of the same Contractors. Looks like the same forms as last time.
We only use qualified contractors.

Let’s get all of them to complete the corporate forms, and let’s ask for all the subcontractor data as well.
I know your busy but they need this form submitted for that next job. It’s the same template as the one last month.

Did they looked at the data from this job we’re doing for them? It’s the same scope.
I hope this data is what the PM needs to determine who gets the tender packages.

I hope so as well, the PM wanted it last month but it took time to collect all the data.
Hope these contractors can do the job. Did I ask the right questions? Safety, quality, past work, financial… What else?
Has this happened to You?

Use the Prequalification Best Practices
Agenda

- Introduction and objectives
- Committee Status and Membership
- Overview of the Best Practice
  - Stages of the prequalification process
  - Process flow diagram
  - Prequalification best practice essentials
- Workshop Exercise – Barriers to implementation
- Group discussion
  - Table
  - Room
- Wrap-up
Introductions

Workshop Facilitators

- Jim - TransCanada
- Frank - Bird
- Bill - Flint

AOC
Workshop Objectives

- Focus on the how to overcome challenges with implementing the best practice

Success/value of this workshop depends on your participation!!
Prequalification Phases

General Contractor Screening (Annual)

Project Specific Screening (Expression of Interest)

Tender

Refer to your handouts for detailed description
Prequalification Golden Rules

Operational Rules

- Prequalification programs need to utilize these Best Practices

- Prequalification programs should align with each stage as defined

- Management of 3rd Party Providers

- Share data across divisions (avoid duplication)

- Keep data current
  - Annual updating of key data
  - Feedback post project
Prequalification Golden Rules

Implementation Rules

• Prequalification process documented and captured in Corporate Policy

• Process supported by all levels
  » Senior level company champion

• Subject to internal audit

• Prequalification reviewers are fully qualified
Exercise

- Review and complete the questionnaire. – 5 min

- Leave the questionnaire on the table for the committee to use in updating the implementation guide.
Exercise – cont’d

Discuss amongst your table what are the most significant challenges to implementation in your organization and how to overcome them. – 15 minutes

30 minute session open discussion.
Wrap Up

- Best practices not a complete process
  (A guide to improve existing prequalification practices)
- Implementation is key in your organization
- Info is available on COAA website
- Continuous Improvements

The current Best Practice is available at:

www.COAA.ab.ca/contracts
Thanks!

- Thank-you for your participation and input!

- Your input will assist the subcommittee to better address the implementation challenges which will benefit both Owners and Contractors.

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