

## ASTO09

# Contribute to the preparation and processing of tender procurement



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### Overview

The Standards that are part of this Unit

1. O09.1 Contribute to evaluating and selecting potential tenderers
2. O09.2 Contribute to the obtaining of estimates, bids and tenders
3. O09.3 Contribute to the assessment and selection of successful tenders and negotiation of changes

This is an optional unit for Maintenance, Quantity Surveying and Building Surveying. It is not applicable to General Practice or Valuation.

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### Performance criteria

#### Contribute to evaluating and selecting potential tenderers

*You must be able to:*

- P1 agreeing with the line manager the appropriate type of **tender** and the potential tenderers which meet the contract specification
- P2 determining how many **tenders** to invite, taking into account the value, size and complexity of the contract
- P3 sending invitations to **tender** to potential **tenderers**, in accordance with statutory **requirements**, and inviting them to provide **evidence** about their experience and capability
- P4 ranking them in order and offering information to decision makers
- P5 evaluating potential **tenderers** who respond to the invitation against the **agreed selection criteria**, and confirming that the selected **tenderers** are willing to tender and revising the list of **tenderers** as necessary

#### Contribute to the obtaining of estimates, bids and tenders

*You must be able to:*

- P6 contributing to the preparation of **tender** documents which meet statutory **requirements** and codes of practice
- P7 issuing tender documents to all the **tenderers** on the agreed list, following the agreed procedures
- P8 responding to queries from **tenderers** promptly and passing on any additional **variations and information** which they need
- P9 investigating any errors, omissions and ambiguities reported by **tenderers** and assisting with amending the **tender** documents
- P10 maintaining accurate records of **tender** documents issued, feedback, **variations and information** received from **tenderers**

#### Contribute to the assessment and selection of successful tenders and negotiation of changes

*You must be able to:*

- P11 ensuring the safe keeping and opening of the **tenders** received in line with organisation's procedures and legal **requirements**
- P12 contributing to the selection of those **tenders** which meet the **criteria** and rejecting those that do not
- P13 checking **tenders** for accuracy and clarifying any discrepancies
- P14 contributing to the analysis of selected **tenders** against agreed **criteria** in order to identify the most appropriate
- P15 identifying and clarifying in writing **variations and information** with relevant **tenderers**
- P16 Informing line manager of **variations and information** to support any negotiations
- P17 Preparing the formal acceptance letter and notifying **tenderers** who have been unsuccessful

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### Knowledge and understanding

*You need to know and understand:*

#### Contribute to evaluating and selecting potential tenderers

- K1 how and why do you determine how many **tenders** to invite? (evaluation) (b) [1]
- K2 how do you agree with the line manager the appropriate type of **tender** and the potential **tenderers** which meet the contract specification? (application) (a) [1,2]
- K3 how do you confirm that the selected **tenderers** are willing to tender? (application) (e) [2]
- K4 how do you revise the list of **tenderers** as necessary? (application) (e) [2]
- K5 how do you send **tender** invitations to potential **tenderers** and invite potential **tenderers** to provide evidence about their experience and capability? (application) (c) [1,2,3,4]
- K6 how and why do you place potential **tenderers** in rank order? (analysis) (d) [2]
- K7 how and why do you offer information to decision makers about potential **tenderers**? (synthesis) (d) [1,2,5]
- K8 how and why do you evaluate potential **tenderers** against the selection criteria? (d) [2,5]

#### Contribute to the obtaining of estimates, bids and tenders

*You need to know and understand:*

- K9 how do you contribute to the preparation of **tender** documents which meet statutory **requirements** and codes of practice? (application) (a) [1,3]
- K10 how do you issue **tender** documents to **tenderers** on the agreed list following the agreed procedures? (application) (b) [1,2,3]
- K11 how do you respond to queries from **tenderers** and pass on any additional **variations and information** which they need? (application) (c) [2,4]
- K12 how do you assist with amending the **tender documents** to correct any errors, omissions or ambiguities? (application) (d) [1,2,4]
- K13 how do you maintain accurate records of **tender** documents issued, feedback, **variations and information** from **tenderers**? (application) (e) [1,2,4]
- K14 how and why do you investigate any errors, omissions and ambiguities reported by **tenderers**? (analysis) (d) [2,3,4]

#### Contribute to the assessment and selection of successful tenders and negotiation of changes

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*You need to know and understand:*

- K15 how do you ensure the safe keeping and opening of the **tenders** received? (application) (a) [1,2]
- K16 how do you check **tenders** for accuracy and clarify any discrepancies? (application) (c) [1]
- K17 how do you identify and clarify, in writing, **variations and information** with relevant **tenderers**? (application) (e) [2,4]
- K18 how do you notify **tenderers** who have been unsuccessful? (application) (g) [2]
- K19 how and why do you contribute to the selection of those **tenders** which meet the **criteria** and reject those tenders which do not? (evaluation) (b) [1,2,5]
- K20 how do you contribute to the analysis of selected **tenders** against agreed criteria in order to identify the most appropriate? (application) (d) [2,5]
- K21 how do you inform your line manager of **variations and information** to support any negotiations? (application) (f) [2,4]
- K22 how do you prepare the formal acceptance letter? (application) (g) [1,2]

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### Additional Information

#### Scope/range related to performance criteria

#### Contribute to evaluating and selecting potential tenderers

1. **Tender:**
  - 1.1. open competitive
  - 1.2. negotiated
2. **Tenderers:**
  - 2.1. contractors
  - 2.2. suppliers
3. **Requirements:**
  - 3.1. legal
  - 3.2. statutory
  - 3.3. EU guidelines
4. **Evidence:**
  - 4.1. documentary
  - 4.2. references
5. **Selection criteria:**
  - 5.1. quality and delivery record
  - 5.2. references from previous clients and bankers
  - 5.3. conflict of interest
  - 5.4. health and safety
  - 5.5. resources (human, materials, facilities)
  - 5.6. environmental policy and management

#### Contribute to the obtaining of estimates, bids and tenders

6. **Tender:**
  - 6.1. open competitive
  - 6.2. negotiated
7. **Tenderers:**
  - 7.1. contractors
  - 7.2. suppliers
8. **Requirements:**
  - 8.1. legal
  - 8.2. statutory
  - 8.3. EU guidelines

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### 9. **Variations and information:**

- 9.1. time
- 9.2. cost
- 9.3. quality

### **Contribute to the assessment and selection of successful tenders and negotiation of changes**

### 10. **Tenders - type:**

- 10.1. open competitive
- 10.2. negotiated

### 11. **Tenderers:**

- 11.1. contractors
- 11.2. suppliers

### 12. **Requirements:**

- 12.1. legal
- 12.2. statutory
- 12.3. EU guidelines

### 13. **Variations and information:**

- 13.1. time
- 13.2. cost
- 13.3. quality

### 14. **Criteria:**

- 14.1. competence of people
- 14.2. quality
- 14.3. technical variability
- 14.4. timescales
- 14.5. costs

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**Originating organisation** Asset Skills

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**Relevant occupations** Professional Occupations; Construction, planning and the built env; Building and construction; Architects, Town Planners and Surveyors

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**Suite** Surveying, Property Maintenance and Valuation

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**Key words** surveying, property maintenance, Valuation, measured surveys, procurement, property disposals, property acquisitions, work schedules, property management, property condition, tenders, bills of quantity