

ASTRBM01

Produce bids to offer property management services



Overview

This standard is for senior managers who are directly responsible for developing and submitting bids to offer property management services.

When developing proposals it is important to consider any constraints which may apply. Ethical constraints are likely to relate to potential conflicts of interest with other work which your company is involved in.

Optimal costings will take into consideration why the contract is being sought, prevailing market conditions (e.g. going rates for such work) and the best estimate of the cost of providing the products and services.

Background documentation may include:

- leases / deed of conditions / title conditions
- memorandum and articles of resident management companies / resident groups / owners associations
- legislation
- codes of practice

In Scotland, managers will need to understand:

- The implications of the law including but not restricted to:
 - Title Conditions Act 2003
 - Tenement Act 2004
 - Abolition of Feudal Tenure (Scotland) Act 2000
 - Housing Scotland Act 2006
- The key differences between English and Scottish systems

This standard covers:

- developing proposals to meet customer requirements
- submitting and negotiating bids for property management services

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Performance criteria

Develop proposals to meet customer requirements

You must be able to:

- P1 evaluate whether the work is suitable for your organisation
- P2 identify the opportunities and constraints (including organisational, legal, resource and ethical constraints) involved in bidding for the work
- P3 seek advice from the relevant people if there are aspects of the work which require clarification
- P4 check the availability of financial, material, capital equipment and human resources required to achieve the contract
- P5 develop proposals in a way which meets organisational and customer requirements

Submit and negotiate bids to offer property management services

You must be able to:

- P6 submit and present proposals in a way which meets organisational and customer requirements
- P7 respond to customer's requests for further information
- P8 conduct post-proposal negotiations (including costs and timings) in a manner which facilitates the successful achievement of the contract
- P9 suggestions during post-proposal negotiations (including costs and timings) are consistent with your organisation's purpose for seeking the contract
- P10 agree and confirm contracts prior to the start of work

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Knowledge and understanding

You need to know and understand:

Develop proposals to meet customer requirements

- K1 how to interpret invitations to offer services
- K2 the background documents which must be consulted when developing proposals
- K3 the organisational, legal, resource and ethical issues which might be involved in taking on particular types of work
- K4 reasons why you may choose not to apply for contracts even though you are able to achieve them
- K5 organisational requirements
- K6 the implications for your work of relevant legislation, regulations, guidelines and codes of practice
- K7 sources of information and advice – technical, legal and financial
- K8 effective ways of presenting proposals which are likely to prove successful in gaining the work
- K9 the information which is required for tenders and its purpose
- K10 the range of resources which will be needed for the contract
- K11 how to arrive at an optimal costing
- K12 the basics principles of building construction and maintenance

Submit and negotiate bids to offer property management services

You need to know and understand:

- K13 your responsibilities in taking on a contract under contract law
- K14 the background documentation which must be consulted
- K15 why post-proposal negotiations may be necessary and how to conduct them in an effective manner
- K16 methods of effective negotiation
- K17 how to obtain the optimum balance between tight and flexible contracts
- K18 the limits to which the organisation will go in securing the contract
- K19 how to conclude project contract negotiations which are effective and mean the contract is able to proceed
- K20 methods of developing and establishing good working relationships with contract holders
- K21 principles and methods of effective project management, your own strengths and weaknesses in this area and where help may be sought from others
- K22 when it may be advisable to draw others into the project management team / negotiation team to help achieve a successful outcome
- K23 the implications for your work of relevant legislation, regulations, guidelines and codes of practice

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Developed by Asset Skills

Version number 2.0

Date approved September 2011

Indicative review date September 2016

Validity Current

Status Original

Originating organisation Asset Skills

Original URN ASTRBM01

Relevant occupations Residential Block Manager; Property Manager

Suite Residential block management

Key words Bid; services; property management; contract; optimal; submit; develop; ethical; provision; offer