

# ASTRBM1

## Produce bids to offer property management services



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### Overview

#### Who this unit is aimed at

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

#### What the unit covers

The standard is made up of two elements:

1. Develop proposals to meet customer requirements
2. Submit and negotiate bids for property management services

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### Performance criteria

#### Develop proposals to meet customer requirements

*You must be able to:*

- P1 you evaluate whether the work is suitable for your organisation
- P2 you identify the opportunities and **constraints** involved in bidding for the work
- P3 you seek advice from the relevant people if there are aspects of the work which require clarification
- P4 you check the availability of **resources** required to achieve the contract
- P5 you 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 you submit and present proposals in a way which meets organisational and customer requirements
- P7 you respond to customer's requests for further information
- P8 you conduct post-proposal **negotiations** in a manner which facilitates the successful achievement of the contract
- P9 your suggestions during post-proposal **negotiations** are consistent with your organisation's purpose for seeking the contract
- P10 you 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 basic 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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### Additional Information

#### Scope/range

#### Develop proposals to meet customer requirements

You must identify the following **constraints**:

1. organisational
2. legal
3. resource availability
4. ethical

You must check the availability of the following **resources**:

5. financial
6. material
7. human
8. capital equipment

You must also show that you have the knowledge and understanding stated in this element.

#### Notes

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:

9. leases/deeds of conditions/title conditions
10. memorandum and articles of resident management companies
11. legislation
12. codes of practice

In Scotland, managers will need to understand the implications of the common law of tenement

#### Submit and negotiate bids to offer property management services

You must provide performance evidence for conduct **negotiations** concerning:

13. costs
14. timing

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You must also show that you have the knowledge and understanding stated in this element.

### Notes

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16. memorandum and articles of resident management companies
17. legislation
18. codes of practice

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**Originating organisation** Asset Skills

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**Relevant occupations** Managers and Senior Officials; Retail and commercial enterprise; Service enterprises; Managers and Proprietors In Other Services

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**Suite** Residential Block Management

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**Key words** Managers; bids; property management services; proposals; submitting; negotiating