

ASTSPM3009

Contribute to the preparation and processing of tender procurement within a surveying environment



Overview

The Standards that are part of this Unit

SPM3/O09.1 Contribute to evaluating and selecting potential tenderers

SPM3/O09.2 Contribute to the obtaining of estimates, bids and tenders

SPM3/O09.3 Contribute to the assessment and selection of successful tenders and negotiation of changes

This unit is about understanding the role and process for tenders and participating in a tender.

ASTSPM3O09

Contribute to the preparation and processing of tender procurement within a surveying environment

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 evaluating potential **tenderers** who respond to the invitation against the agreed selection criteria, and ranking them in order and offering information to decision makers
 - P5 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

ASTSPM3O09

Contribute to the preparation and processing of tender procurement within a surveying environment

been unsuccessful

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? (evaluation) (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

ASTSPM3O09

Contribute to the preparation and processing of tender procurement within a surveying environment

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]

ASTSPM3O09

Contribute to the preparation and processing of tender procurement within a surveying environment

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

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- 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

ASTSPM3O09

Contribute to the preparation and processing of tender procurement within a surveying environment

9 Variations and information:

- 9.1 time
- 9.2 cost
- 9.3 quality

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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

ASTSPM3O09

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