

Overview

This unit is about developing a procurement programme, short listing and selecting appropriate tenderers. It is also about the review and amendment of tender documents and ensuring that addenda are issued.

You will need to negotiate and agree formal contractual arrangements for the implementation and operation of supply chain requirements.

You will need to develop a potential list of tenderers who meet the contract criteria. You will also need to send prequalification tender enquiries to potential tenderers and evaluate those that respond in order to shortlist them against chosen selection criteria.

You will need to select an appropriate tender. You will also need to review tender documents to ensure that they cover the scope of work and also ensure that they are issued. You will also need to investigate any errors reported by tenderers, amend tender documents and ensure that addenda are reissued. You will need to acknowledge and evaluate tenders against the agreed criteria and modify and repeat the tender process where necessary. You will need to choose the best tenderer, appoint them formally, and notify the unsuccessful tenderers. You will also need to negotiate and agree any variations, adjustments and corrections with the tenderer prior to contract.

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Performance criteria

Develop a procurement programme

You must be able to:

- P1 confirm the areas of the asset for which resources will need to be procured and identify potential sources for obtaining them
- P2 develop a detailed and accurate procurement programme in an appropriate format and identify the lead times for ordering and receiving essential resources
- P3 identify any inconsistencies and unacceptable variations in the procurement programme, specify and agree with **stakeholders** the ways in which supply chain requirements will be managed and aligned
- P4 identify and agree, with all **partners**, the changes to the supply chain requirements which are necessary to meet asset standard and technical and quality requirements
- P5 develop and implement appropriate **tests and trials**, assess the **results**, identify problems and make appropriate decisions before moving to full implementation
- P6 check that supply chain routes conforms to the asset requirements
- P7 negotiate and agree formal approvals and contractual arrangements for the implementation and operation of the supply chain requirements
- P8 integrate the procurement programme so that it is consistent with the requirements of the **overall programme**, statutory bodies and others who will be affected

Evaluate and select potential tenderers

You must be able to:

- P9 select an appropriate type of procurement process and decide which potential **tenderers** could meet the contract specification
- P10 decide how many **tenderers** to invite, taking into account the quality of the asset
- P11 send enquiries to potential **tenderers**, in accordance with regulatory requirements, and require them to provide **evidence** about their experience and capability
- P12 choose **selection criteria** which are suited to the quality of the asset and for the type of work described in the tender
- P13 check that supply chain routes conform to the asset requirements
- P14 negotiate and agree formal approvals and contractual arrangements that set out the requirements for the implementation and operation of supply chain requirements
- P15 evaluate potential **tenderers** who respond to the invitation against the **selection criteria**, place them in rank order and choose the number needed
- P16 offer advice and information to decision makers about potential **tenderers** and the **selection criteria** and modify the tender list to reflect any changes which are agreed

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- P17 confirm that the selected **tenderers** are willing to tender
- P18 consider adding more potential **tenderers** from the evaluation list which meet the **selection criteria** if those contacted are not willing to tender

Obtain estimates, bids and tenders

You must be able to:

- P19 collate and issue **procurement documents** which meet statutory regulations, codes of practice and the organisations policies to all the **tenderers** on the agreed list, following the agreed procedures
- P20 respond to **queries** from **tenderers** promptly and pass on any additional **information** which they need
- P21 store the tenders received in a secure place and open them on the closing date in line with the organisation's procedures and **regulatory requirements**
- P22 investigate any errors, omissions and ambiguities which are reported by **tenderers** and amend the **procurement documents** to correct them and ensure that addendums are re-issued
- P23 keep accurate records of **procurement documents** issued, feedback, **queries and information** from **tenderers**
- P24 agree and implement action when **tenderers** withdraw from the process

Assess and select successful tenderers and negotiate changes

You must be able to:

- P25 check with **tenderers** if any discrepancies, omissions and errors are found in the **tenders**, and make any amendments which **tenderers** authorise
- P26 evaluate the **tenders** and choose those that best meet the **criteria** and reject those that do not
- P27 check that the successful **tenderer** and the client can meet the obligations of the contract and recommend a preferred **tenderer** to the client
- P28 accept the successful **tenderer** formally and politely notify **tenderers** who have been unsuccessful, about the result
- P29 negotiate and agree any **variations, adjustments and corrections** with the successful **tenderer** and confirm them in writing, subject to contract

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Knowledge and understanding

Develop a procurement programme

You need to know and understand:

- K1 how to confirm the areas of the asset for which resources will need to be procured (application)
- K2 what to identify as potential sources for obtaining resources (understanding)
- K3 how and why to develop a detailed and accurate procurement programme (synthesis)
- K4 what to identify within the procurement programme as the lead times for ordering and receiving essential resources (understanding)
- K5 what to identify as inconsistencies and unacceptable variations in the procurement programme (understanding)
- K6 how and why to specify and agree with **stakeholders** the ways in which supply chain requirements will be managed and aligned (evaluation)
- K7 what to identify with **partners**, as the necessary changes to the supply chain requirements (understanding)
- K8 how and why to agree with all **partners**, the changes to the supply chain requirements which are necessary to meet asset standard and technical and quality requirements (evaluation)
- K9 how and why to develop appropriate **tests and trials** (synthesis)
- K10 how to implement appropriate **tests and trials** (application)
- K11 how and why to assess the **results** of the **tests and trials** (analysis)
- K12 what to identify as problems with the **results** of the **tests and trials** before moving to full implementation (understanding)
- K13 how and why to make decisions before moving to full implementation of the **test and trials** (evaluation)
- K14 how to check that the supply chain routes conform to asset requirements (application)
- K15 how and why to negotiate formal approvals and contractual arrangements for the implementation and operation of supply chain requirements (synthesis)
- K16 how and why to agree formal approvals and contractual arrangements for the implementation and operation of supply chain requirements (evaluation)
- K17 how and why to integrate the procurement programme so that it is consistent with the requirements of the **overall programme**, statutory bodies and other who will be affected (synthesis)

Evaluate and select potential tenderers

You need to know and understand:

- K18 how and why to select an appropriate type of procurement process and decide which potential **tenderers** could meet the contract specification (evaluation)

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- K19 how and why to decide how many **tenderers** to invite taking into account the quality of the asset (evaluation)
- K20 how and why to decide which potential **tenderers** could meet the contract specification (evaluation)
- K21 how to confirm that the selected **tenderers** are willing to tender (application)
- K22 how to send enquiries to potential **tenderers** requiring them to provide **evidence** about their experience and capability (application)
- K23 how and why to choose **selection criteria** which are suited to the quality of the asset and for the type of work described in the tender
- K24 how to modify the tender list to reflect any changes which are agreed (application)
- K25 how and why to negotiate formal approvals and contractual arrangements that set out the requirements for the implementation and operation of supply chain requirements (synthesis)
- K26 how and why to agree formal approvals and contractual arrangements that set out the requirements for the implementation and operation of supply chain requirements (evaluation)
- K27 how and why to place potential **tenderers** in rank order (analysis)
- K28 how and why to evaluate potential **tenderers** and choose the number of **tenderers** needed (evaluation)
- K29 how to confirm that the selected **tenderers** are willing to tender (application)
- K30 how and why to consider adding more potential **tenderers** from the evaluation list which meet the **selection criteria** if those contacted are not willing to tender (evaluation)
- K31 how and why to offer advice and information to decision makers about potential **tenderers** and the **selection criteria** (synthesis)
- K32 how to check that the supply chain routes conform to the asset requirements (application)

Obtain estimates, bids and tenders

You need to know and understand:

- K33 how and why to collate and issue **procurement documents** to all the **tenderers** (evaluation)
- K34 how to respond to **queries** from **tenderers** and pass on any **information** which **tenderers** need (application)
- K35 how to store and open the tenders received (application)
- K36 how to amend the **procurement documents** to correct any errors, omissions or ambiguities and ensure that addendums are reissued (application)
- K37 how and why to investigate any errors, omissions and ambiguities which are reported by **tenderers** (analysis)
- K38 how to keep accurate records of **procurement documents** issued, feedback, **queries and information** from **tenderers** (application)
- K39 how and why to agree action when **tenderers** withdraw from the

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process (evaluation)

K40 how to implement action when **tenderers** withdraw from the process (application)

Assess and select successful tenderers and negotiate changes

You need to know and understand:

K41 how to check with **tenderers** if any discrepancies, omissions and errors are found in the **tenders** and make any amendments which **tenderers** authorise (application)

K42 how and why to evaluate the **tenders** which are selected and choose the **tender** which best meets the **criteria** (evaluation)

K43 how to check that the successful **tenderer** and the client can meet the obligations of the contract (application)

K44 how and why to recommend a preferred **tenderer** to the client (synthesis)

K45 how to notify **tenderers** who have been unsuccessful, about the result (application)

K46 how and why to accept the successful **tender** formally (evaluation)

K47 how to confirm any **variations, adjustments and corrections** in writing, subject to contact (application)

K48 how and why to negotiate any **variations, adjustments and corrections** with the successful **tenderer** (synthesis)

K49 how and why to agree any **variations, adjustments and corrections** with the successful **tenderer** (evaluation)

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Scope/Range

Develop a procurement programme

- 1 Stakeholders:**
 - 1.1 contractors
 - 1.2 subcontractors
 - 1.3 suppliers
 - 1.4 consultants
 - 1.5 clients/end users
 - 1.6 specialists
 - 1.7 planning authorities
 - 1.8 funding agencies
 - 1.9 environmental bodies
 - 1.10 heritage bodies
- 2 Partners:**
 - 2.1 internal
 - 2.2 external
- 3 Test(s) and trial:**
 - 3.1 physical
 - 3.2 condition
 - 3.3 performance
 - 3.4 environmental
 - 3.5 material
- 4 Results:**
 - 4.1 reports
 - 4.2 archival research
 - 4.3 scientific analysis
 - 4.4 environmental exposure
 - 4.5 performance and relevance of materials
 - 4.6 visual assessment
- 5 Overall programme:**
 - 5.1 client's overall timescale and requirements
 - 5.2 tender and contract activities
 - 5.3 key dates for long delivery items

Evaluate and select potential tenderers

- 6 Tenderers:**
 - 6.1 contractors
 - 6.2 sub/works/trade contractors
 - 6.3 suppliers
 - 6.4 consultants

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- 6.5 negotiation
- 6.6 specialist conservators
- 6.7 laboratories
- 6.8 testing facility
- 7 Evidence:**
 - 7.1 documentary
 - 7.2 references
 - 7.3 interview
 - 7.4 workplace evidence
- 8 Selection criteria:**
 - 8.1 quality and delivery record
 - 8.2 added value (including past performance)
 - 8.3 acceptability of known sub-contracting arrangements
 - 8.4 acceptability to client
 - 8.5 financial resources
 - 8.6 health and safety
 - 8.7 competence & capability
 - 8.8 knowledge and experience
 - 8.9 specialism
 - 8.10 resources
 - 8.11 insurance
 - 8.12 environmental policy and management

Obtain estimates, bids and tenders

- 9 Procurement documents:**
 - 9.1 invitation to tender
 - 9.2 form of tender
 - 9.3 returns procedure
 - 9.4 surveys
 - 9.5 specifications
 - 9.6 drawings
 - 9.7 schedules
 - 9.8 bills of quantities
 - 9.9 health, safety and environmental plans
 - 9.10 scope of services
 - 9.11 terms and conditions
 - 9.12 schedules of rates
 - 9.13 evaluation criteria and procedures
- 10 Tenderers:**
 - 10.1 contractors
 - 10.2 sub/works/trade contractors

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- 10.3 suppliers
- 10.4 consultants
- 10.5 negotiation
- 10.6 specialist conservators
- 10.7 laboratories
- 10.8 testing facility

11 **Queries and information about:**

- 11.1 price
- 11.2 quantity
- 11.3 quality
- 11.4 standards
- 11.5 logistics
- 11.6 conservation
- 11.7 completion
- 11.8 maintenance
- 11.9 after sales service
- 11.10 method of payment
- 11.11 terms of payment
- 11.12 contract conditions
- 11.13 survey information
- 11.14 time
- 11.15 contractual
- 11.16 administrative
- 11.17 technical
- 11.18 design

12 **Regulatory requirements:**

- 12.1 statutes
- 12.2 regulations, including EU regulations
- 12.3 codes of practice and procedure

Assess and select successful tenderers and negotiate changes

13 **Tenderers:**

- 13.1 contractors
- 13.2 sub/works/trade contractors
- 13.3 suppliers
- 13.4 consultants
- 13.5 negotiation
- 13.6 specialist conservators
- 13.7 laboratories
- 13.8 testing facility

14 **Tenders:**

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- 14.1 single
- 14.2 competitive
- 14.3 negotiated
- 15 Criteria:**
 - 15.1 quality
 - 15.2 technical viability
 - 15.3 timescale
 - 15.4 cost , loading and cash flow
 - 15.5 policies which offer added value
 - 15.6 comparative criteria
 - 15.7 weighting
 - 15.8 organisational policies
 - 15.9 regulatory requirements
 - 15.10 competence of people
 - 15.11 conservation issues
 - 15.12 community benefits
 - 15.13 best whole life value
- 16 Variations, adjustments and corrections:**
 - 16.1 price
 - 16.2 quantity
 - 16.3 quality
 - 16.4 standards
 - 16.5 logistics
 - 16.6 completion
 - 16.7 maintenance
 - 16.8 method of payment
 - 16.9 terms of payment
 - 16.10 contract conditions
 - 16.11 scope of service
 - 16.12 terms and conditions

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Developed by	ConstructionSkills
Version Number	2
Date Approved	March 2012
Indicate review date	March 2018
Validity	Current
Status	Original
Originating organisation	ConstructionSkills
Original URN	COSBEDCL4018
Relevant occupations	Town planners; chartered surveyors (not quantity surveyors); building inspectors; construction project manager and related professions
Suite	Town Planning, Conservation and Building Control
Key Words	Tenderers; procurement; contractual; tender documents; scope of work