

# COSCCOO07

## Prepare and process invitations to tender in construction



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### Overview

This unit is about identifying and pre-qualifying tenderers such as sub-contractors and suppliers, and producing and issuing tender documents. You will need to identify and list potential tenderers, send out pre-qualification enquiries, evaluate responses and confirm the tender list.

You will need to draw up, review for accuracy and issue tender documents. You will need to deal with errors and enquiries and keep accurate records. You will need to check tenders received against agreed criteria and recommend the tender which best meets the criteria.

### Performance criteria

#### Identify potential tenderers

- You must be able to:*
- P1 identify a list of potential tenderers able to meet the contract criteria and suitable for pre-qualification
  - P2 offer advice and information to decision makers about potential tenderers and the selection criteria
  - P3 obtain pre-qualification information about potential tenderers to confirm evidence about their experience and capability and availability to carry out the work
  - P4 evaluate potential tenderers who respond to the pre-qualification enquiry against the selection criteria in order to short-list.
  - P5 confirm that the selected tenderers are willing to bid and, if necessary, refer to the original long list

#### Prepare and issue tender documents

- You must be able to:*
- P6 draft and review appropriate tender documents in relevant formats to ensure that they cover the scope of the works, contract and client requirements
  - P7 ensure that all tender documents are issued in accordance with agreed procedures
  - P8 record any changes required by the client
  - P9 identify any changes which are reported and amend the tender documents and ensure that addendums are re-issued
  - P10 keep accurate records of tender documents issued, feedback and identified changes
  - P11 implement action when tenderers withdraw from the process

#### Check tenders

- You must be able to:*
- P12 acknowledge and check the tenders received against the agreed criteria
  - P13 modify and repeat the tendering processes if too few tenders are received to show that there has been adequate competition
  - P14 check with tenderers if any discrepancies, omissions and errors are found in the tenders, and record any amendments which tenderers authorise.
  - P15 identify tenders which meet the criteria

### Knowledge and understanding

*You need to know and understand:*

#### Identify potential tenderers

- K1 how to identify a list of potential tenderers (application)
- K2 how and why to offer advice and information to decision makers about potential tenderers and the selection criteria (synthesis)
- K3 how to obtain pre-qualification information about potential tenderers to confirm evidence about their experience and capability and availability to carry out the work (application)
- K4 how and why to evaluate potential tenderers against the selection criteria in order to short list (evaluation)
- K5 how to confirm that the selected tenderers are willing to tender (application)

#### Prepare and issue tender documents

*You need to know and understand:*

- K6 how to draft appropriate tender documents (application)
- K7 how and why to review tender documents (analysis)
- K8 how to ensure that tender documents are issued in accordance with agreed procedures (application)
- K9 how to record any changes required by the client (application)
- K10 what to identify as any reported changes (understanding)
- K11 how to amend the tender documents (application)
- K12 how to ensure that addendums are re-issued (application)
- K13 how to keep accurate records of tender documents issued, feedback and identified changes(application)
- K14 how to implement action when tenderers withdraw from the process (application)

#### Check tenders

*You need to know and understand:*

- K15 how to acknowledge the tenderers received (application)
- K16 how to check the tenderers received against the agreed criteria (application)
- K17 how to modify and repeat the tendering processes if too few tenders are received to show that there has been adequate competition (application)

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- K18 how to check with tenderers if any discrepancies, omissions and errors are found in the tenders and record any amendments which tenderers authorise (application)
- K19 what to identify as the tenders which meet the criteria (understanding)

### Additional Information

#### Scope/range

#### Identify potential tenderers

##### 1. Tenderers:

- 1.1. contractors
- 1.2. sub/works/trade contractors
- 1.3. suppliers
- 1.4. consultants

##### 2. Evidence:

- 2.1. documentary
- 2.2. references
- 2.3. interview

##### 3. Selection criteria:

- 3.1. quality and delivery record
- 3.2. competitiveness
- 3.3. perceived added value (including reputation of potential contractors)
- 3.4. acceptability of known sub-contracting arrangements
- 3.5. acceptability to client
- 3.6. financial resources
- 3.7. references from previous clients and bankers
- 3.8. health and safety
- 3.9. competence of people
- 3.10. resources (human, materials, facilities)
- 3.11. insurance
- 3.12. environmental policy and management
- 3.13. innovation
- 3.14. local economic benefit

#### Prepare and issue tender documents

##### 4. Tender:

- 4.1. open competitive
- 4.2. two stage
- 4.3. selected list
- 4.4. negotiated

### **5. Documents:**

- 5.1. invitation to tender
- 5.2. form of tender
- 5.3. returns procedure
- 5.4. surveys
- 5.5. specifications
- 5.6. drawings
- 5.7. schedules
- 5.8. bills of quantities
- 5.9. health, safety and welfare requirements
- 5.10. scope of services
- 5.11. terms and conditions
- 5.12. schedules of rates
- 5.13. evaluation criteria and procedures
- 5.14. environmental requirements
- 5.15. procedures for submitting tenders

### **6. Formats:**

- 6.1. paper
- 6.2. electronic

### **7. Client requirements:**

- 7.1. Electronic
- 7.2. preferred suppliers
- 7.3. confidentiality
- 7.4. publicity restrictions
- 7.5. local and economic benefits
- 7.6. industry accreditation
- 7.7. workforce accreditation
- 7.8. agreed conservation value

### **8. Changes:**

- 8.1. price
- 8.2. quantity
- 8.3. quality
- 8.4. standards
- 8.5. carriage and delivery
- 8.6. completion

- 8.7. maintenance
- 8.8. after sales service
- 8.9. method of payment
- 8.10. terms of payment
- 8.11. contract conditions
- 8.12. survey information
- 8.13. timescales
- 8.14. client amendment

### **9. Tenderers:**

- 9.1. contractors
- 9.2. sub/works/trade contractors
- 9.3. suppliers
- 9.4. consultants

### **Check tenders**

### **10. Tenderers:**

- 10.1. contractors
- 10.2. sub/works/trade contractors
- 10.3. suppliers

### **11. Criteria:**

- 11.1. consultants
- 11.2. tender compliance
- 11.3. quality
- 11.4. technical viability
- 11.5. timescale
- 11.6. cost (budgets, rates)
- 11.7. loading and cash flow
- 11.8. policies which offer added value
- 11.9. any variations, adjustments and corrections

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## Prepare and process invitations to tender in construction

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