
Overview

This unit is about the evaluation of tender enquiries, identifying and making necessary measurements and producing estimates by costing resources. You will need to check and summarise tender details and identify points of concerns. You will need to make recommendations about tenders and maintain records.

You will need to assemble, collate and review information and measure quantities and prepare descriptions. You will need to identify inaccurate information and deal with it appropriately.

You will need to develop working documents, calculate resource requirements, estimate costs, allowing for external factors, and produce an overall estimate. You will need to explain the costings and produce payment schedules.

Performance criteria

Evaluate estimate, bid and tender enquiry documentation

You must be able to:

- P1 review and summarise the tender details and tender requirements
- P2 identify any points of concern in the tender and refer them to decision makers for them to clarify and resolve
- P3 evaluate the tender documents against the organisational capability and make recommendations to line managers
- P4 make recommendations about tender requirements and potential alternatives, within the limits of the tender information which is available, and which provide an objective basis for making a decision on whether to make a bid
- P5 maintain records about tender enquiries in confidence and only pass them on to people who have the authority to receive them

Calculate, quantities, resources and costs within a tender

You must be able to:

- P6 assemble and collate information and identify which categories of work require measurement
- P7 review information to decide how to measure dimensions and calculate quantities methodically and in a way which conforms to relevant conventions, standard methods and standard phraseology
- P8 calculate the quantities and prepare descriptions accurately, collate and sequence them correctly and present them in a way which meets their intended purpose
- P9 calculate accurately, from available sources, what resources will be needed and investigate whether the resources will be available
- P10 estimate resource costs by calculating an accurate cost for each item which is required
- P11 develop a proposed method statement and draft programme which meet the tender enquiry requirements
- P12 modify the cost to take into account any external factors which may affect the cost projections

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Prepare estimates, bids and tenders in construction

Collate and present tender information

You must be able to:

- P13 refer quantity, resource and cost information to decision makers
- P14 collate and produce the overall estimate of costs and checking that it is complete, accurate and in a form which is suitable for a judgment to be made
- P15 explain and clarify the projected costs to support the calculations
- P16 contribute to payment schedules which will meet known cash flow requirements
- P17 collate, arrange and present tender offer information in accordance with procurement requirements to line manager

Knowledge and understanding

You need to know and understand:

Evaluate estimate, bid and tender enquiry documentation

- K1 how and why to review the tender details and tender requirements (analysis)
- K2 how to summarise the tender details and tender requirements (application)
- K3 what to identify as any points of concern in the tender and refer them to decision makers for them to clarify and resolve (understanding)
- K4 how and why to evaluate the tender documents against the organisational capability and make recommendations to line managers (evaluation)
- K5 how and why to make recommendations about tender requirements and potential alternatives, within the limits of the tender information which is available, and which provide an objective basis for making a decision on whether to make a bid (synthesis)
- K6 how to maintain records about tender enquiries in confidence and only pass them on to people who have the authority to receive them (application)

Calculate, quantities, resources and costs within a tender

You need to know and understand:

- K7 how to assemble and collate information (application)
- K8 what to identify as categories of work requiring measurement (understanding)
- K9 how and why to review information to decide how to measure dimensions and quantities (analysis)
- K10 how to calculate the quantities and prepare descriptions accurately, collate and sequence them correctly and present them in a way which meets their intended purpose(application)
- K11 how to calculate accurately, from available sources, what resources will be needed (application)
- K12 how and why to investigate whether the resources will be available (analysis)
- K13 how to estimate resource costs by calculating an accurate cost for each item which is required (analysis)

- K14 how and why to develop a proposed method statement and draft programme which meet the tender enquiry requirements (synthesis)
- K15 how to modify the cost to take into account any external factors which may affect the cost projections (application)

You need to know and understand:

Collate and present tender information

- K16 how to refer quantity, resource and cost information to decision makers (application)
- K17 how to collate and produce the overall estimate of costs and checking that it is complete, accurate and in a form which is suitable for a judgment to be made (application)
- K18 how to explain and clarify the projected costs to support the calculations (application)
- K19 how to contribute to payment schedules which will meet known cash flow requirements (application)
- K20 how to collate, arrange and present tender offer information in accordance with procurement requirements to line manager (application)

Additional Information

Scope/range

Evaluate estimate, bid and tender enquiry documentation

1. Tender - type:

- 1.1. contractor
- 1.2. sub/works/trade contractor
- 1.3. supply
- 1.4. consultancy

2. Tender requirements:

- 2.1. construction
- 2.2. installation and maintenance work
- 2.3. supply of goods and materials
- 2.4. consultancy services

3. Decision makers:

- 3.1. clients and their agents
- 3.2. colleagues
- 3.3. line managers
- 3.4. specialists - internal or external to organisation

4. Points of concern:

- 4.1. inconsistent with the policy of the organisation
- 4.2. discrepancies within enquiry information
- 4.3. tender procedure requirements
- 4.4. quantitative requirements
- 4.5. qualitative requirements
- 4.6. contractual requirements

5. Tender documents - type:

- 5.1. invitation to tender
- 5.2. form of tender
- 5.3. returns procedure
- 5.4. survey reports
- 5.5. specifications
- 5.6. drawings
- 5.7. schedules
- 5.8. bills of quantities
- 5.9. health and safety & welfare policies

- 5.10. environmental policies
- 5.11. scope of services
- 5.12. terms and conditions
- 5.13. schedule of rates
- 5.14. procedures for submitting tenders
- 5.15. evaluation criteria and procedures

6. Organisational capability:

- 6.1. financial
- 6.2. viability of tendering information
- 6.3. current workload
- 6.4. type of work
- 6.5. competence of people
- 6.6. timescale (tender contract)
- 6.7. social policies
- 6.8. environmental impact
- 6.9. location
- 6.10. social and political policies

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7. Information:

- 7.1. drawings
- 7.2. schedules
- 7.3. specifications
- 7.4. information about the contract and allocation of risks and responsibilities
- 7.5. quotations
- 7.6. records of queries raised and answers
- 7.7. standard methods of measurement
- 7.8. technical literature

8. Measurement - relates to:

- 8.1. trade
- 8.2. elemental
- 8.3. operational
- 8.4. approximate
- 8.5. schedules of rates

9. Measure dimensions and calculate quantities:

- 9.1. manual
- 9.2. electronic

10. Calculate cost:

- 10.1. electronic
- 10.2. manual

11. Estimate:

- 11.1. cost based on a quotation
- 11.2. unit cost built up from basic data
- 11.3. internal and historical cost data
- 11.4. published cost data

12. Intended purpose:

- 12.1. procurement
- 12.2. contract
- 12.3. production

13. Resources - type:

- 13.1. people (in-house, external)
- 13.2. plant and equipment
- 13.3. materials
- 13.4. finance
- 13.5. time
- 13.6. supply options

14. Tender requirements:

- 14.1. invitation to tender
- 14.2. form of tender
- 14.3. returns procedure
- 14.4. surveys
- 14.5. specifications
- 14.6. drawings
- 14.7. schedules
- 14.8. bills of quantities
- 14.9. health, safety and welfare requirements
- 14.10. scope of services
- 14.11. terms and conditions
- 14.12. schedules of rates

14.13. evaluation criteria and procedures

14.14. environmental requirements

14.15. procedures for submitting tenders

15. External factors:

15.1. variations over time

15.2. geographic location

15.3. statutory and contractual requirements

15.4. special working conditions and methods

15.5. special resourcing conditions and availability

Assess the resource requirements and costs within a tender

16. Explain and clarify:

16.1. orally

16.2. written

16.3. electronic

17. Tender offer:

17.1. contractor

17.2. sub/works/trade contractor

17.3. supply

17.4. consultancy

17.5. purchase

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