

Overview

This Unit is about your competence to procure transportation services and contracts such as a resurfacing contract, data collection contract or consultancy services. The key competences are: the ability to select a procurement procedure, agree a form of contract, and evaluate tenders, as well as negotiate and finalise a contract.

You will need to identify the requirements for the project taking account of any conflicting demands. You will also need to identify suitable methods for procuring and monitoring a project. You will need to recommend and agree an appropriate procurement method and selection criteria.

You will need to negotiate and agree the form of contract that is best suited to the project, taking due account of the constraints and project requirements. This will involve giving appropriate information and advice.

You will need to apply selection criteria to tenders to identify the best tender. You will also need to negotiate any changes or adjustments/corrections to the proposal and accept the successful tender.

You will need to negotiate a contract on the best possible terms and arrange for the legal contract to be produced. You will also need to ensure that adequate insurance cover is obtained to safeguard the contract.

Performance criteria

- You must be able to:*
- Select and agree a procurement procedure with a client
 - P1 identify key requirements, resolving any conflicting demands between them, review their relative importance and risks, and confirm the critical priorities
 - P2 identify methods which are suitable for monitoring and controlling the critical priorities
 - P3 identify and agree feasible and realistic procurement objectives and criteria
 - P4 identify procurement methods which are capable of meeting the procurement objectives and evaluate them against appropriate criteria
 - P5 select and recommend the most effective procurement method which meets client constraints and relevant legal and statutory requirements
 - P6 agree and record the selected procurement method and appropriate implementation procedures
 - Agree a form of contract
 - You must be able to:*
 - P7 identify clearly the people involved the people involved the people involved the people involved and the purpose of the contract
 - P8 identify with the people involved the people involved significant criteria for selecting the form of contract
 - P9 agree a form of contract form of contract form of contract form of contract which is appropriate to the type of project
 - P10 give clear and accurate information and advice and giving clients opportunities to comment and to ask for clarification
 - Evaluate and select successful tenders and negotiate changes
 - You must be able to:*
 - P11 select for evaluation those tenders which meet the criteria
 - P12 evaluate the tenders which are selected against the agreed criteria and choose the tender which best meets the criteria
 - P13 negotiate and agree any variations, adjustments and corrections with the successful tenderer and confirm them in writing, subject to contract
 - P14 accept the successful tender formally and notify tenderers who have been unsuccessful to tell them, politely, about the result
 - Negotiate and finalise a contract for the supply of works, goods, materials and consultancy services consultancy services

You must be able to:

P15 negotiate contracts using a style and manner which maintains good long-term relationships with all the people involved in the contract

P16 negotiate and agree the best possible supply position, contract terms, conditions and amendments and accurately summarising the results

P17 arrange for the results of negotiations to be recorded accurately and passed on promptly to all the people involved in the contract

P18 arrange for the preparation of accurate copies of the final contract documents check that they meet legal requirements and arrange for them to be signed

P19 check adequate insurance cover to safeguard the contract

Knowledge and understanding

- You need to know and understand:*
- Select and agree a procurement procedure with a client
 - K1 how and why to resolve any conflicting demands between them (synthesis)
 - K2 how to review their relative importance and risks (analysis)
 - K3 how to confirm the critical priorities (application)
 - K4 what to identify as methods which are suitable for monitoring and controlling the critical priorities (understanding)
 - K5 what to identify as feasible and realistic procurement objectives and criteria (understanding)
 - K6 how and why to agree feasible and realistic procurement objectives and criteria (evaluation)
 - K7 how and why to agree feasible and realistic procurement objectives and criteria (evaluation)
 - K8 what to identify as procurement methods which are capable of meeting the procurement objectives and evaluating them against appropriate criteria (understanding)
 - K9 how and why to select the most effective procurement method which meets client constraints and relevant legal and statutory requirements (evaluation)
 - K10 how and why to select the most effective procurement method which meets client constraints and relevant legal and statutory requirements (evaluation)
 - K11 how and why to recommend the most effective procurement method which meets client constraints and relevant legal and statutory requirements (synthesis)
 - K12 how and why to agree the selected procurement method and appropriate implementation procedures (evaluation)
 - K13 how to record the selected procurement method and appropriate implementation procedures (application)
 - Agree a form of contract
 - You need to know and understand:*
 - K14 what to identify as the purpose of the contract with the people involved (understanding)
 - K15 what to identify as significant criteria selecting the form of contract with the people involved people involved people involved people involved (understanding)

K16 how and why to agree a form of contract form of contract form of contract form of contract which is appropriate to the type of project (evaluation)

K17 how to give clear and accurate information and advice (application)

K18 how to give clients opportunities to comment and to ask for clarification (application)

K19 how and why to select for evaluation those tenders which meet the criteria (evaluation)

K20 how and why to evaluate the tenders which are selected against the agreed criteria and choose the tender which best meets the criteria (evaluation)

K21 how and why to negotiate any variations, adjustments and corrections with the successful tenderer and confirm them in writing, subject to contract (synthesis)

K22 how and why to agree any variations, adjustments and corrections with the successful tenderer and confirm them in writing, subject to contract (evaluation)

K23 how to accept the successful tender formally and notifying tenderers who have been unsuccessful to tell them, politely, about the result (application)

K24 how to notify tenderers who have been unsuccessful to tell them, politely, about the result (application)

Negotiate and finalise a contract for the supply of works, goods, materials consultancy services

K25 how and why to negotiate contracts using a style and manner which maintains good long term relationships with all the people involved in the contract (synthesis)

K26 negotiating and agreeing the best possible supply position, contract terms, conditions and amendments and accurately summarising the results (synthesis)

K27 how and why to agree the best possible supply position, contract terms, conditions and amendments and accurately summarising the results (evaluation)

K28 how to arrange for the results of negotiations to be recorded accurately and passed on promptly to all the people involved in the contract (application)

K29 how to arrange for the preparation of accurate copies of the final contract documents (application)

K30 how to check that contract documents meet legal requirements and

arrange for them to be signed (application)

K31 how to check adequate insurance cover to safeguard the contract
(application)

Scope/range

vSelect and agree a procurement procedure with a client Select and agree a procurement procedure with a client Select and agree a procurement procedure with a client Select and agree a procurement procedure with a client

1 Procurement objectives:

1.2 type and form of contract

1.3 risk allocation

1.4 project duration and complexity

1.5 economic and political context

1.6 funding sources

1.5 funding sources

2 Criteria:

2.1 degree of commercial and financial risk

2.2 degree of commercial and financial risk

2.3 relative cost

2.4 timescale

2.5 quality

3 Procurement methods:

3.1 single source/single negotiations

3.2 competitive tendering

4 Client constraints:

4.1 mandatory

4.2 advisory

5 Legal and statutory requirements:

5.1 common law

5.2 contract law

5.3 codes of practice and procedures

6 Implementation procedures:

6.1 tendering process

6.2 tender evaluation

6.3 award recommendation

6.4 contract award

Agree a form of contract

7 the people involved:

7.1 the client

7.2the employer

7.3 sub-contractors

7.4 third parties

8 Criteria for selecting the form of contract:

8.1 client's needs and requirements

8.2 form of procurement

8.3 technical complexity

8.4 sector practice

Evaluate and select successful tenders and negotiate changes

9 Criteria:

9.1 quality

9.2 compliance with tender requirements

9.3 technical viability

9.4 timescale

9.5 cost (budgets, rates)

9.6 loading and cash-flow

9.7 policies which offer added value

9.8 weighting

9.9 organisational policies

9.10 legal requirements

10 Variations, adjustments and corrections:

10.1 price

10.2 quantity

10.3 quality

10.4 standards

10.5 carriage and delivery

10.6 completion

10.7 maintenance

10.8 after sales service

10.9 method of payment

10.10 terms of payment

10.11 contract condition

Negotiate and finalise a contract for the supply of works, goods, materials and consultancy services 11 Contracts - type:

11.1 main contract

11.2 sub-contract

11.3 lump sum

Agree project procurement

- 11.4 schedule based
- 11.5 prime cost based
- 11.6 hybrid
- 11.7 firm price
- 11.8 fluctuating price
- 11.9 labour and materials
- 11.10 labour only
- 11.11 material supply only
- 11.12 service contracts
- 11.13 design warranties
- 12 People involved in the contract:
 - 12.1 employers
 - 12.2 clients
 - 12.3 sub-contractors
 - 12.4 third parties
- 13 Amendments:
 - 13.1 allocation of risks and responsibilities
 - 13.2 structure of contract
 - 13.3 key instructions
 - 13.4 legal factors
- 14 Legal and statutory requirements:
 - 14.1 regulations, including European Union regulations
 - 14.2 codes of practice and procedures
 - 14.3 common law
- 15 Contract documents:
 - 15.1 standard forms of contract
 - 15.2 contract drawing
 - 15.3 specifications
 - 15.4 schedules
 - 15.5 bills of quantity and approximate bills of quantity
 - 15.6 other relevant correspondence

Agree project procurement

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