
Overview

This standard is about understanding the role and process for tendering and procurement, implementing procurement routes selected for projects and carrying out tendering processes relevant to them. It is about contributing to evaluating and selecting potential tenderers, contributing to the obtaining of estimates, bids and tenders, and contributing to the assessment and selection of successful tenders and negotiation of changes.

Performance criteria

You must be able to:

1. agree with your line manager the required type of procurement process which aligns with legal and statutory requirements and identify which potential tenderers could meet the contract conditions
2. determine which potential tenderers meet the contract specification to fulfil the selected type of procurement process
3. determine how many tenderers to invite, considering the value and size of the contract
4. send invitations to tender to potential tenderers, in accordance with relevant statutory requirements, and invite them to provide evidence about their experience and capability
5. evaluate potential tenderers who respond to the invitation against the agreed selection criteria, rank them in order and present the information to the evaluation panel
6. confirm that the selected tenderers are available to tender and revise the list of tenderers as required
7. contribute to the preparation of tender documents which meet relevant statutory requirements and codes of practice
8. issue tender documents to all the tenderers on the agreed list, following your organisation's agreed procedures
9. respond to queries from tenderers within the agreed timescales and pass on any additional variations and information which they require
10. maintain records of tender documents issued, feedback, variations and information received from tenderers
11. confirm the safe keeping and opening of the tenders received in line with your organisation's procedures and relevant legal requirements
12. contribute to the selection of those tenders which meet the criteria and reject those that do not
13. contribute to the analysis of tenders which are selected against the agreed criteria
14. contribute to the negotiation and agreement of any variations, adjustments and corrections with the successful tenderer and confirm them in writing, subject to contract
15. accept the successful tender formally and notify tenderers who have been unsuccessful, about the result

Knowledge and understanding

You need to know and understand:

1. the main types of procurement and tendering used in your industry
2. how to agree with your line manager the required type of procurement process and the potential tenderers who meet the contract specification
3. how to confirm that the selected tenderers are available to tender
4. your organisation's tender and procurement processes
5. how to present information to the evaluation panel about potential tenderers
6. the importance of evaluating potential tenderers against the selection criteria
7. the relevant statutory requirements and codes of practice for tender documents
8. the agreed procedures for issuing tender documents to tenderers on the agreed list
9. your organisation's procedures for responding to queries from tenderers and passing on any additional variations and information which they need
10. how to maintain accurate records of tender documents issued, feedback, variations and information from tenderers
11. how to confirm the safe keeping and opening of the tenders received
12. how to identify and clarify, in writing, variations and information with relevant tenderers
13. how to analyse selected tenders against agreed criteria to identify those tenders that meet the criteria
14. how to confirm any variations, adjustments and corrections with the successful tenderer in writing, subject to contract
15. how to accept the successful tender formally and how to notify tenderers who have been unsuccessful

**Scope/range related
to performance
criteria**

Tender:

- open competitive
- negotiated
- public

Tenderers:

- contractors
- suppliers

Requirements:

- legal
- statutory
- EU guidelines

Evidence:

- documentary
- references

Selection criteria:

- quality and delivery record
- competence of people
- references from previous clients and bankers
- conflict of interest
- health and safety
- resources (human, materials, facilities)
- environmental policy and management
- technical variability
- timescales
- costs

Variations and information:

- time
- cost
- quality

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Suite Surveying, Property Maintenance

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