

### Overview

This unit is about preparing a strategy for the project using the most appropriate team. The needs of the stakeholders will be identified along with the requirements of the brief and schedule. You will need to develop effective communication activities, and be able to demonstrate project development, evaluation and monitoring skills. You will need to review the project risks and opportunities and their effects on the available resources. You will need to develop and maintain systems for health, safety and welfare - in particular, identifying and complying with current legislation - with reference to the equipment and resources and their effects on the project. You must provide evidence of the evaluation of project feedback, and how improvements have been made.

## Performance criteria

*You must be able to:*

### Evaluate potential tenderers

- P1 decide which potential **tenderers** could meet the contract specification to fulfil the selected type of procurement process
- P2 decide how many **tenderers** to invite, taking into account the value and size of the contract
- P3 send enquiries to potential **tenderers**, in accordance with **regulatory requirements**, and require them to provide **evidence** about their experience and capability
- P4 choose **selection criteria** which are suitable to weight and rate performance for the type of work described in the tender
- P5 evaluate potential **tenderers** who respond to the invitation against the **selection criteria**, place them in rank order and choose the number needed
- P6 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
- P7 confirm that the selected **tenderers** are willing to tender
- P8 add more potential **tenderers** from the evaluation list which meet the **selection criteria** if those contacted are not willing to tender

### Obtain bids and tenders

*You must be able to:*

- P9 ensure that **procurement documents** are drafted which meet statutory regulations, codes of practice and the organisation policies
- P10 ensure that **procurement documents** are issued to all the **tenderers** on the agreed list, following the agreed procedures
- P11 respond to **queries** from **tenderers** promptly and pass on any additional information which they need
- P12 ensure that accurate records are kept of **procurement documents** issued, feedback, **queries** and information from **tenderers**
- P13 ensure that required action is implemented when **tenderers** withdraw from the process

### Analyse and select successful bids and tenders and negotiate changes

*You must be able to:*

- P14 ensure that the tenders received are stored in a secure place and opening them on the closing date in line with the organisation's procedures and **regulatory requirements**
- P15 select for evaluation those tenders which meet the **criteria** and reject those that do not
- P16 check with **tenderers** if any discrepancies, omissions and errors are found in the tenders, and make any amendments to which **tenderers** agree

**Performance  
criteria**

- P17 analyse the tenders which are selected against the agreed **criteria** and choose the tender which best meets the **criteria**
- P18 check that the successful **tenderer** and the client can meet the obligations of the contract and recommend a preferred tender to the client
- P19 negotiate and agree any **variations, adjustments and corrections** with the successful **tenderer** and confirm them in writing, subject to contract
- P20 accept the successful tender formally and politely notify **tenderers** who have been unsuccessful, about the result
- P21 modify and repeat the procurement processes if too few tenders are received to show that there has been adequate competition

**Knowledge and understanding**

*You need to know and understand:*

**Evaluate potential tenderers**

- K1 how and why to decide how many **tenderers** to invite (evaluation)
- K2 how and why to decide which potential **tenderers** could meet the contract specification to fulfil the selected type of procurement process (evaluation)
- K3 how to confirm that the selected **tenderers** are willing to tender (application)
- K4 how to send enquiries to potential **tenderers** and require them to provide **evidence** about their experience and capability (application)
- K5 how and why to choose **selection criteria** which are suitable for the type of work described in the tender (evaluation)
- K6 how to modify the tender list to reflect any changes which are agreed (application)
- K7 how to add more potential **tenderers** from the evaluation list which meet the **selection criteria** if those contacted are not willing to tender (application)
- K8 how and why to place potential **tenderers** in rank order (analysis)
- K9 how and why to offer advice and information to decision makers about potential **tenderers** and the **selection criteria** (synthesis)
- K10 how and why to evaluate potential **tenderers** and choose the number needed (evaluation)

**Obtain bids and tenders**

*You need to know and understand:*

- K11 how to ensure that **procurement documents** are drafted (evaluation)
- K12 how to ensure that **procurement documents** are issued (application)
- K13 how to ensure that required action is implemented when **tenderers** withdraw from the process (application)
- K14 how to respond to **queries** from **tenderers** and pass on any information which they need (application)
- K15 how to ensure that accurate records are kept of **procurement documents** issued, feedback, **queries** and information from **tenderers** (application)

**Analyse and select successful bids and tenders and negotiate changes**

*You need to know and understand:*

- K16 how to ensure that the tenders received are stored in a secure place and opened in line with the organisational procedures and **regulatory requirements** (application)
- K17 how to check with **tenderers** if any discrepancies, omissions and errors are found in the tenders and make any amendments to which **tenderers** agree (application)
- K18 how to check that the successful **tenderer** and the client can meet the obligations of the contract (application)

**Knowledge and understanding**

- K19 how to modify and repeat the procurement processes if too few tenders are received to show that there has been adequate competition (application)
- K20 how and why to recommend a preferred tender to the client (synthesis)
- K21 how to notify **tenderers** who have been unsuccessful, about the result (application)
- K22 how and why to select for evaluation those tenders which meet the **criteria** and reject those tenders which do not meet the **criteria** (evaluation)
- K23 how and why to analyse the tenders which are selected and choose the tender which best meets the **criteria** (analysis)
- K24 how and why to accept the successful tender formally (evaluation)
- K25 how to confirm any **variations, adjustments and corrections** in writing, subject to contact (application)
- K26 how and why to negotiate any **variations, adjustments and corrections** with the successful **tenderer** (synthesis)
- K27 how and why to agree any **variations, adjustments and corrections** with the successful **tenderer** (evaluation)

**Scope/range**

**Evaluate potential tenderers**

- 1 Tenderers:
  - 1.1 contractors
  - 1.2 sub/works/trade contractors
  - 1.3 suppliers
  - 1.4 consultants
- 2 Regulatory requirements:
  - 2.1 compulsory competitive tendering
  - 2.2 international (including European Union)
  - 2.3 in house
  - 2.4 national
  - 2.5 local
- 3 Evidence:
  - 3.1 documentary
  - 3.2 references
  - 3.3 interview
  - 3.4 workplace evidence
- 4 Selection criteria:
  - 4.1 quality of deliverables
  - 4.2 past performance
  - 4.3 added value
  - 4.4 acceptability of known sub-contracting arrangements
  - 4.5 acceptability to client
  - 4.6 financial resources
  - 4.7 health and safety
  - 4.8 competence of people
  - 4.9 resources (human, materials, facilities)
  - 4.10 insurance
  - 4.11 environmental

**Obtain bids and tenders**

- 5 Procurement documents:
  - 5.1 invitation to tender

**Scope/range**

- 5.2 form of tender
- 5.3 returns procedure
- 5.4 surveys
- 5.5 specifications
- 5.6 drawings and schedules
- 5.7 bills of quantities
- 5.8 health, safety and environmental plans
- 5.9 scope of services
- 5.10 terms and conditions
- 5.11 schedules of rates
- 5.12 evaluation criteria and procedures
- 6 Tenderers:
  - 6.1 contractors
  - 6.2 sub/works/trade contractors
  - 6.3 suppliers
  - 6.4 consultants
- 7 Queries:
  - 7.1 errors
  - 7.2 omissions
  - 7.3 ambiguities

**Analyse and select successful bids and tenders and negotiate changes**

- 8 Regulatory requirements:
  - 8.1 statutes
  - 8.2 regulations, including EU regulations
  - 8.3 codes of practice and procedure
- 9 Criteria:
  - 9.1 quality of deliverables
  - 9.2 technical
  - 9.3 timescale
  - 9.4 resources
  - 9.5 cost
  - 9.6 loading and cash flow

**Scope/range**

- 9.7 alternative solutions which offer added value
- 9.8 comparative criteria (eg price indices, databases, trade journals, pre-tender estimates)
- 9.9 organisational policies
- 9.10 regulatory requirements
- 9.11 competence of people
- 10 Tenderers:
  - 10.1 contractors
  - 10.2 sub/works/trade contractors
  - 10.3 suppliers
  - 10.4 consultants
- 11 Variations, adjustments and corrections:
  - 11.1 price
  - 11.2 quantity
  - 11.3 quality
  - 11.4 standards
  - 11.5 logistics
  - 11.6 completion
  - 11.7 maintenance
  - 11.8 after sales service
  - 11.9 scope of service
  - 11.10 terms and conditions





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**Developed by** ConstructionSkills

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**Version number**

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**Date Approved** December 2008

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**Indicative review date** November 2019

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**Validity** Current

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**Status** Original

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**Originating organisation** ConstructionSkills

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**Original URN** COSCSMO11

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**Relevant occupations** Managers in construction

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**Suite** Construction Senior Management

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**Keywords** Procurement; brief; schedule; evaluation

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