COSCSMO12 SQA Unit Code H99X 04

Manage the preparation and submission of estimates, bids and tenders in construction management

Overview

This unit is about managing the technical content of the tendering process.

You will need to manage the tender process in terms of resources and time. You will need to ensure that resource cost requirements are estimated. You will need to produce the overall costings and conclude the process by proposing payment profiles.

You will need to consider the risks and opportunities in a tender and specified qualifications to the tender based on the enquiry. You will manage the completion of the tender and present it to the organisation. You will conclude the process by storing all of the tender information securely.

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Performance criteria

You must be able to:

Evaluate estimate, bid and tender enquiry documentation

P1 check the **tender** details and **tender requirements** and confirm them with **decision makers**

P2 summarise the **tender requirements** accurately and pass them on for comment to **decision makers**

P3 identify any **points of concern** in the **tender documents** and refer them to **decision makers** for them to clarify and resolve

P4 evaluate the **tender documents** against the **agreed criteria** and assess whether the organisation is capable of meeting the **tender requirements**

P5 identify and assess any contractual and **legal issues** which might affect the project

P6 investigate the **tender documents** within budgets and tender time limits

P7 draw accurate conclusions about **tender requirements** 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

P8 keep information about **tender** enquiries in confidence and only pass it on to people who have the authority to receive it

You must be able to:

Assess the resource requirements and costs within an estimate, bid and tender

P9 develop a proposed method statement and draft programme which meet the **tender requirements**

P10 ensure that the **resources** needed are calculated accurately from **available sources**, resource availability is investigated and the information is presented so that the requirements can be costed and planned

P11 ensure that **resource** costs are **estimated** by **calculating** an accurate **cost** for each item which is required

P12 ensure that the cost is modified to take into account any **external factors** which may affect the cost projections

P13 produce the overall estimate of costs and check that it is complete, accurate and in a form which is suitable for a judgement to be made

P14 explain and clarify the projected costs to support the calculations

P15 recommend payment schedules which will meet known cash flow requirements

You must be able to:

Finalise and submit an estimate, bid and tender offer

P16 identify and evaluate, realistically, the **risks and opportunities** involved in a successful **tender offer**

P17 identify and specify any **alternatives and qualifications** to the original **tender requirements** which may improve the organisation's ability to

carry out the work

P18 apply a profit margin and payment schedule which meets the objectives and strategy of the organisation

P19 check that the **tender offer** is complete and accurate and conforms to house style and make any necessary modifications

P20 **present** and support the **tender offer** in a manner which maximises its acceptability

P21 collate, arrange and submit the **tender offer** information in accordance with procurement requirements

P22 collect together all the **tender offer** information, record it, store it securely and only pass it on to people who have the authority to receive it

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Knowledge and understanding

You need to know and understand:

Evaluate estimate, bid and tender enquiry documentation

K1 how to check the **tender** details and **tender requirements** (application)

K2 how to confirm the **tender** details and **tender requirements** with **decision makers** (application)

K3 how to summarise the **tender requirements** accurately (application)

K4 how to pass summaries of the **tender requirements** on for comment to **decision makers** (application)

K5 what to identify as any **points of concern** in the **tender documents** (understanding)

K6 how to refer any **points of concern** in the **tender documents** to **decision makers** for them to clarify and resolve (application)

K7 how and why to evaluate the **tender documents** against the **agreed criteria** (evaluation)

K8 how and why to assess whether the organisation is capable of meeting the **tender requirements** (analysis)

K9 what to identify as any contractual and **legal issues** which might affect the project (understanding)

K10 how and why to assess any contractual and **legal issues** which might affect the project (analysis)

K11 how and why to investigate the **tender documents** within budgets and tender time limits (analysis)

K12 how and why to draw accurate conclusions about **tender requirements** 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 (evaluation)

K13 how to keep information about **tender** enquiries in confidence (application)

K14 how to pass on information about **tender** enquiries on to people who have the authority to receive it (application)

You need to know and understand:

Assess the resource requirements and costs within an estimate, bid and tender

K15 how and why to develop a proposed method statement and draft programme which meet the tender requirements (evaluation)

K16 how to ensure that the **resources** needed are calculated accurately from **available sources**, resource availability is investigated and the

information is presented so that the requirements can be costed and planned (application)

K17 how to ensure that resource costs are **estimated** by calculating an accurate cost for each item which is required (application)

K18 how to ensure that the cost is modified to take into account any **external factors** which may affect the cost projections (application)

K19 how to produce the overall estimate of costs (application)

K20 how to check that the overall estimate of costs is complete, accurate and in a form which is suitable for a judgement to be made (application)

K21 how to explain the projected costs to support the calculations (application)

K22 how to clarify the projected costs to support the calculations (application)

K23 how and why to recommend payment schedules which will meet known cash flow requirements (synthesis)

Finalise and submit an estimate, bid and tender offer

You need to know and understand:

K24 what to identify as the **risks and opportunities** involved in a successful **tender offer** (understanding)

K25 how and why to evaluate, realistically, the **risks and opportunities** involved in a successful **tender offer** (evaluation)

K26 what to identify as any **alternatives and qualifications** to the original **tender requirements** which may improve the organisation's ability to carry out the work (understanding)

K27 how and why to specify any **alternatives and qualifications** to the original **tender requirements** organisation's ability to carry out the work (evaluation)

K28 how to apply a profit margin and payment schedule which meets the objectives and strategy of the organisation (application)

K29 how to check that the **tender offer** is complete and accurate and conforms to house style (application)

K30 how to make any necessary modifications to the **tender offer** (application)

K31 how to **present** and support the **tender offer** in a manner which maximises its acceptability (application)

K32 how to collate the **tender offer** information in accordance with procurement requirements (application)

K33 how to arrange the **tender offer** information in accordance with procurement requirements (application)

K34 how to submit the **tender offer** information in accordance with procurement requirements (application)

K35 how to collect together all the **tender offer** information (application)

K36 how to record the **tender offer** information (application)

K37 how to store the **tender offer** information securely (application)

K38 how to pass the **tender offer** information on to people who have the authority to receive it (application)

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Scope/range

Evaluate estimate, bid and tender enquiry documentation

1 Tender:

- 1.1 contractor
- 1.2 sub/works/trade contractor
- 1.3 supply
- 1.4 consultants

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 and directors
- 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:

- 5.1 invitation to tender
- 5.2 form of tender
- 5.3 returns procedure
- 5.4 survey reports
- 5.5 specifications

5.6 graphical and non-graphical electronic data files

5.7 drawing schedule and programme

5.8 bills of quantities

5.9 health, safety and welfare requirements

5.10 scope of services

5.11 terms and conditions

5.12 schedule of rates

5.13 environmental requirements

5.14 procedures for submitting tenders

5.15 evaluation criteria and procedures

6 Agreed criteria:

6.1 change to organisational capability

6.2 financial

6.3 viability of tendering information

6.4 current workload

6.5 type of work

6.6 competence of people

6.7 timescale (tender and contract)

6.8 social and political policies

6.9 environmental impact

6.10 location

6.11 potential completion

7 Legal issues:

7.1 planning

7.2 health and safety

7.3 environmental

7.4 ownership

7.5 common law rights

7.6 European Union requirements

Assess the resource requirements and costs within an estimate, bid and

tender

8 Tender requirements:

- 8.1 construction
- 8.2 installation and maintenance work
- 8.3 supply of goods and materials
- 8.4 consultancy services
- 8.5 purchasing
- 8.6 low carbon and resource efficient procurement
- 8.7 invitation to tender
- 8.8 form of tender
- 8.9 technology required
- 8.10 procedures for submitting tenders

9 Resources:

- 9.1 people (in-house & external)
- 9.2 plant and equipment
- 9.3 materials
- 9.4 finance
- 9.5 time
- 9.6 supply options

10 Available sources:

- 10.1 client brief
- 10.2 tender enquiry documentation
- 10.3 site measurements/visits
- 10.4 survey reports
- 10.5 scaled drawings
- 10.6 schedules
- 10.7 method statements
- 10.8 programmes
- 10.9 specialist contractors and suppliers

11 Estimate:

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

12 Calculate cost:

- 12.1 manual
- 12.2 electronic

13 External factors:

- 13.1 variations over time
- 13.2 location
- 13.3 statutory and contractual requirements
- 13.4 special working conditions and methods
- 13.5 resourcing conditions
- 13.6 competition

Finalise and submit an estimate, bid and tender offer

14 Risks and opportunities:

- 14.1 environmental and sustainability
- 14.2 social
- 14.3 financial and market fluctuations
- 14.4 political
- 14.5 technical
- 14.6 health and safety
- 14.7 reputation
- 14.8 competence of people

15 Tender offer:

- 15.1 contractor
- 15.2 sub/works/trade contractor

15.3 supply

15.4 consultancy

15.5 purchase

16 Alternatives and qualifications:

16.1 specifications and materials

16.2 methods of construction

16.3 services

16.4 time-scales

16.5 supply options

16.6 price offer options

16.7 whole life value

17 Tender requirements:

17.1 construction

17.2 installation and maintenance work

17.3 supply of goods and materials

17.4 consultancy services

17.5 delivery

18 Present:

18.1 orally

18.2 in writing

18.3 graphically

18.4 using computer models

18.5 electronically

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