
Overview

This unit is about selecting suppliers to supply products and/or services through a formal tendering process against a specification.

The standard is relevant to managers and leaders who are not procurement specialists but who are required to select suppliers through a formal tendering process as part of their role.

This standard links closely to all the other standards in key area *EC Procure products and services* and also to *CFAM&LEB2 Obtain physical resources* and *CFAM&LEB5 Optimise effective use of technology*. It mirrors, from a procurement perspective, the standard in key area *FC Manage sales*, *CFAM&LFC2 Bid for contracts*.

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Select suppliers through a tendering process

Performance criteria

- You must be able to:*
- P1 Comply with relevant organisational procedures and legal and ethical requirements when selecting suppliers.
 - P2 Seek support from colleagues or procurement or legal specialists on any aspects of tendering about which you are unsure.
 - P3 Draw up a specification which clearly describes the products/services required, including information on quality, time and cost constraints, where appropriate.
 - P4 Invite a number and range of suitably-qualified prospective suppliers to tender proportionate to:
 - P4.1 the value of the contract
 - P4.2 the diversity of suppliers available.
 - P5 Include full information about the tendering process, deadlines for receipt of tenders, contract details and how pre-tender queries will be dealt with.
 - P6 Answer pre-tender queries in ways which ensure all prospective suppliers have the same information available to them.
 - P7 Establish clear criteria to allow tenders to be evaluated fairly and the supplier that provides the optimal mix of quality, cost, timeliness and reliability to be selected.
 - P8 Receive, record and open tenders in line with your organisation's procedures.
 - P9 Evaluate tenders, by yourself or with others as required, rigorously applying established criteria and seeking clarification from prospective suppliers where necessary.
 - P10 Offer a contract to supply the products/services to the supplier whose tender was evaluated most highly.
 - P11 Inform unsuccessful prospective suppliers of the outcome of the evaluation and provide them with clear and specific feedback where appropriate.
 - P12 Resolve any post-tender queries with unsuccessful suppliers promptly and effectively.

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 The importance of following relevant organisational procedures and legal and ethical requirements when selecting suppliers.
- K2 How to draw up a specification that clearly describes the products/services required, including information on quality, time and cost constraints, where appropriate.
- K3 The importance of communicating information clearly, concisely and accurately, and how to do so.
- K4 How to identify suitably-qualified prospective suppliers to tender, taking account of the value of the contract and the diversity of suppliers available.
- K5 The importance of including full information about the tendering process, deadlines for receipt of tenders, contract details and how pre-tender queries will be dealt with.
- K6 How to deal with pre-tender queries in ways which ensure all prospective suppliers have the same information available to them.
- K7 How to establish clear criteria and how to evaluate the tenders fairly, using the criteria, and select the supplier that provides the optimal mix of quality, cost, timeliness and reliability.
- K8 How to evaluate tenders rigorously and the importance of seeking clarification from prospective suppliers, where necessary.
- K9 The importance of informing unsuccessful prospective suppliers of the outcome of the evaluation and providing them with clear and specific feedback, where appropriate.
- K10 How to resolve any post-tender queries with unsuccessful suppliers promptly and effectively.

Industry/sector specific knowledge and understanding

You need to know and understand:

- K11 Industry/sector requirements for selecting suppliers.

Context specific knowledge and understanding

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You need to know and understand:

- K12 Relevant organisational procedures and legal and ethical requirements for selecting suppliers.
- K13 Sources of advice, guidance and support from colleagues or procurement or legal specialists on any aspects of tendering for supplies about which you are unsure.
- K14 The limits of your own knowledge, skills and competence.
- K15 The details of the specifications and products/services required.
- K16 The diversity of suppliers available.

Behaviours

When performing to this standard, you are likely to demonstrate the following behaviours:

- 1 Listen actively, ask questions, clarify points and restate or rephrase statements to check mutual understanding
- 2 Present information clearly, concisely, accurately and in ways that promote understanding
- 3 Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
- 4 Act within the limits of your authority
- 5 Show integrity, fairness and consistency in decision-making
- 6 Clearly agree what is expected of others and hold them to account
- 7 Focus personal attention on specific details that are critical to achieving successful results
- 8 Check the accuracy and validity of information
- 9 Make appropriate information and knowledge available promptly to those who need it and have a right to it
- 10 Identify the range of elements in a situation and how they relate to each other
- 11 Take timely decisions that are realistic for the situation

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Skills

When performing to this standard, you are likely to demonstrate the following skills:

- Assessing
- Communicating
- Decision-making
- Evaluating
- Presenting information
- Problem solving
- Providing feedback
- Questioning
- Reviewing
- Setting objectives
- Time management

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