

Construction Contracting Operations Level 3 CCOL3

The Unit:

CCOL3/O07 Prepare and process estimate, bid and tender enquiries
SQA Unit Code F519 04

The Standards that are part of this Unit

CCOL3/O07.1 Identify potential tenderers

CCOL3/O07.2 Prepare and issue tender

documents CCOL3/O07.3 Check tenders

The Unit Commentary

This Optional Unit is about identifying and pre-qualifying tenderers such as sub-contractors and suppliers and producing and issuing tender documents.

O07.1 Identify potential tenderers

You will need to identify and list potential tenderers, send out pre-qualification enquiries, evaluate responses and confirm the tender list.

O07.2 Prepare and issue tender documents

You will need to draw up, review for accuracy and issue tender documents. You will need to deal with errors and enquiries and keep accurate records.

O07.3 Check tenders

You will need to check tenders received against agreed criteria and recommend the tender which best meets the criteria.

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007.1 Identify potential tenderers

Performance Criteria - this involves...

- (a) identifying a list of potential **tenderers** able to meet the contract criteria and suitable for pre-qualification
- (b) offering advice and information to decision makers about potential **tenderers** and the **selection criteria**
- (c) obtaining pre-qualification information about potential **tenderers** to confirm **evidence** about their experience and capability and availability to carry out the work
- (d) evaluating potential **tenderers** who respond to the pre-qualification enquiry against the **selection criteria** in order to short-list.
- (e) confirming that the selected **tenderers** are willing to bid and, if necessary, refer to the original long list

The Range...

[1] Tenderers:

- contractors;
- sub/works/trade contractors;
- suppliers;
- consultants

[2] Evidence:

- documentary;
- references;
- interview

[3] Selection criteria:

- quality and delivery record;
- competitiveness;
- perceived added value (including reputation of potential contractors);
- acceptability of known sub-contracting arrangements;
- acceptability to client;
- financial resources;
- references from previous clients and bankers;
- health and safety;
- competence of people;
- resources (human, materials, facilities);
- insurance;
- environmental policy and management

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O07.1 Identify potential tenderers

The Evidence - performance and process

Taken as a whole, the evidence must show that the candidate consistently meets all the performance criteria, across the ranges for the Element.

References in brackets after items in the Evidence specification refer to the corresponding performance criteria, eg. (a), and range, eg. [1], to which they apply.

There must be workplace evidence against each performance criterion. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant performance criterion.

Product Evidence:

The candidate must produce documentary evidence from the workplace covering the following items that are considered to be common and key/critical to demonstrate competence.

(f) Record(s) of tender information sent to potential tenderers (a,b,c) [1,2,3]

(g) Evaluation(s) of tenderers including advice and information provided (b,d,e) [1,2]

Simulations are not considered to be acceptable for producing evidence for this Element.

Process Evidence:

None applicable

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O07.2 Prepare and issue tender documents

Performance Criteria - this involves...

- (h) drafting appropriate **tender documents**
- (i) reviewing **tender documents** to ensure that they cover the scope of the works and contract requirements
- (j) ensuring that all **tender documents** are issued in accordance with agreed procedures
- (k) investigating any errors, omissions and ambiguities which are reported by **tenderers** and amending the **tender documents** to correct them and ensuring that addendums are re-issued
- (l) implementing action when **tenderers** withdraw from the process
- (m) keeping accurate records of **tender documents** issued, feedback, **queries and information** from **tenderers**

The Range...

[1] Tender:

- open competitive;
- two stage;
- selected list;
- negotiated

[2] Tender documents:

- invitation to tender;
- form of tender;
- returns procedure;
- surveys;
- specifications;
- drawings;
- schedules;
- bills of quantities;
- health and safety plans;
- scope of services;
- terms and conditions;
- schedules of rates

[3] Tenderers:

- contractors;
- sub/works/trade contractors;
- suppliers;
- consultants

[4] Queries and information about:

- price;
- quantity;
- quality;
- standards;
- carriage and delivery;
- completion;
- maintenance;
- after sales service;
- method of payment;
- terms of payment;

- contract conditions;
- survey information;
- timescales

Evidence: Knowledge and Understanding

Established from questioning the candidate or from industry recognised education and training course assessment, which is matched to the Element. A candidate's knowledge and understanding can also be demonstrated through presented performance evidence.

- (1) How do you confirm that the selected **tenderers** are willing to tender? (application) (e) [1]
- (2) How do you identify a list of potential **tenderers**? (application) (a) [1]
- (3) How do you obtain pre-qualification information about potential **tenderers** to confirm **evidence** about their experience and capability and availability to carry out the work? (application) (c) [1,2]
- (4) How and why do you offer advice and information to decision makers about potential **tenderers** and the **selection criteria**? (synthesis) (b) [1,3]
- (5) How and why do you evaluate potential **tenderers** against the **selection criteria** in order to short list? (evaluation) (d) [1,3]

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O07.2 Prepare and issue tender documents

The Evidence - performance and process

Taken as a whole, the evidence must show that the candidate consistently meets all the performance criteria, across the ranges for the Element.

References in brackets after items in the Evidence specification refer to the corresponding performance criteria, eg. (a), and range, eg. [1], to which they apply.

There must be workplace evidence against each performance criterion. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant performance criterion.

Product Evidence:

The candidate must produce documentary evidence from the workplace covering the following items that are considered to be common and key/critical to demonstrate competence:

- (n) Tender document(s) (a) [1,2]
- (o) Record(s) of tender documents issued including amendments and queries (b,c,d,e,f)
[all]

Simulations are not considered to be acceptable for producing evidence for this Element.

Process Evidence:

None applicable

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O07.3 Check tenders

Performance Criteria - this involves...

- (p) acknowledging and checking the tenders received against the agreed **criteria**
- (q) modifying and repeating the tendering processes if too few tenders are received to show that there has been adequate competition
- (r) checking with **tenderers** if any discrepancies, omissions and errors are found in the tenders, and recording any amendments which **tenderers** authorise.
- (s) recommending the tender which best meets the **criteria**

The Range...

[1] Tenderers:

- contractors;
- sub/works/trade contractors;
- suppliers;
- consultants

[2] Criteria:

- tender compliance;
- quality;
- technical viability;
- timescale;
- cost (budgets, rates);
- loading and cash flow;
- policies which offer added value;
- any variations, adjustments and corrections

Evidence: Knowledge and Understanding

Established from questioning the candidate or from industry recognised education and training course assessment, which is matched to the Element. A candidate's knowledge and understanding can also be demonstrated through presented performance evidence.

- (6) How and why do you draft appropriate **tender documents**? (evaluation) (a) [1,2]
- (7) How do you review **tender documents**? (application) (b) [1,2,3]
- (8) How do you ensure that **tender documents** are issued in accordance with agreed procedures? (application) (c) [2]
- (9) How do you implement action when **tenderers** withdraw from the process? (application) (e) [1,3]
- (10) How do you amend the **tender documents** to correct any errors, omissions or ambiguities? (application) (d) [1,2,4]
- (11) How do ensure that addendums are re-issued? (application) (d) [1,2,4]
- (12) How do you keep accurate records of **tender documents** issued, feedback, **queries** and **information** from **tenderers**? (application) (f) [1,2,3,4]

(13) How and why do you investigate any errors, omissions and ambiguities which are reported by **tenderers**? (analysis) (d) [1,2,3]

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O07.3 Check tenders

The Evidence - performance and process

Evidence: knowledge and understanding

Taken as a whole, the evidence must show that the candidate consistently meets all the performance criteria, across the ranges for the Element.

Established from questioning the candidate or from industry recognised education and training course assessment, which is matched to the Element. A candidate's knowledge and understanding can also be demonstrated through presented performance evidence.

References in brackets after items in the Evidence specification refer to the corresponding performance criteria, eg. (a), and range, eg. [1], to which they apply.

(14)

How do you check with **tenderers** if any discrepancies, omissions and errors are found in the **tenders** and record any amendments which **tenderers** authorise? (application) (c) [1]

There must be workplace evidence against each performance criterion. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant performance criterion.

(15)

How do you modify and repeat the tendering processes if too few tenders are received to show that there has been adequate competition? (application) (b) [1,2]

Product Evidence:

The candidate must produce documentary evidence from the workplace covering the following items that are considered to be common and key/critical to demonstrate competence

(16)

How do you recommend the tender which best meets the criteria? (evaluation) (d) [1,2]

(t) Records of criteria for checking tenders

How do you acknowledge the **tenderers** received? (application) (a) [1]

(u) Records of any errors or omissions found in tenders and amendments made

(18)

How do you check the **tenderers** received against the agreed **criteria**? (application) (a) [1,2]

Simulations are not considered to be acceptable for producing evidence for this Element.

Process Evidence:

None applicable