

COSCCOMO13 - SQA Unit Code FM6X 04

Evaluate enquiries and submit tenders in construction contracting operations management



Overview

This unit is about evaluating the organisational capability to meet tender requirements and the submission of tenders.

You will need to evaluate the tender documents against agreed criteria and assess the organisation's capability to meet the tender requirements. You will then need to identify and assess any contractual and legal issues which might affect the project. You will then need to keep information about tender enquiries confidential and only pass it on to people who have the authority to receive it

You will need to identify and evaluate risks and opportunities involved in the submission of a successful tender. You will then need to modify costs to take into account any external factors and also identify a profit margin and payment schedule. You will also need to check that the tender is complete and accurate. You will need to collate and submit tender information in accordance with procurement requirements to support the tender to maximise its acceptability.

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Performance criteria

You must be able to:

Evaluate tender enquiry documentation

- P1 identify any **points of concern** in the **tender documents**
- P2 evaluate the **tender documents** against the **agreed criteria** and assess the organisational capability of meeting the **tender requirements**
- P3 identify and assess any contractual and **legal issues** which might affect the project
- P4 keep information about **tender** enquiries in confidence and only pass it on to people who have the authority to receive it

Finalise and submit a tender

You must be able to:

- P5 identify and evaluate the **risks and opportunities** involved in a successful **tender**
- P6 identify opportunities for any **alternatives and/or qualifications** to the original **tender requirements** to optimise the **tender**
- P7 modify the costs to take into account any external factors which may affect the cost projections
- P8 identify a profit margin and payment schedule which meets the objectives and strategy of the organisation and notify decision makers
- P9 check that the **tender** is complete and accurate and conforms to house style and make any necessary modifications
- P10 collate, arrange and submit **tender** information in accordance with procurement requirements and support the **tender** in a manner which maximises its acceptability

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Knowledge and understanding

You need to know and understand:

Evaluate tender enquiry documentation

- K1 what to identify as any **points of concern** in the **tender documents** (understanding)
- K2 how and why to evaluate the **tender documents** against the **agreed criteria** (evaluation)
- K3 how and why to assess the organisational capability of meeting the **tender requirements** (analysis)
- K4 what to identify as any contractual and **legal issues** which might affect the project (understanding)
- K5 how and why to assess any contractual and **legal issues** which might affect the project (analysis)
- K6 how to keep information about **tender** enquiries confidential and only pass it on to people who have the authority to receive it (application)

Finalise and submit a tender

You need to know and understand:

- K7 what to identify as any **risks and opportunities** involved in a successful **tender** (understanding)
- K8 how and why to evaluate the **risks and opportunities** involved in a successful **tender** (evaluation)
- K9 what to identify as opportunities for any **alternatives and/or qualifications** to the original **tender requirements** to optimise the **tender** (understanding)
- K10 how to modify the costs to take into account any external factors which may affect the cost projections (application)
- K11 what to identify as a profit margin and payment schedule which meets the objectives and strategy of the organisation (understanding)
- K12 how to notify decision makers about identified profit margin and payment schedule (application)
- K13 how to check that the **tender** is complete and accurate and conforms to house style and make any necessary modifications (application)
- K14 how to collate, arrange and submit **tender** information in accordance with procurement requirements supporting the **tender** in a manner which maximises its acceptability (application)

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Scope/range

Evaluate tender enquiry documentation

- 1 Points of concern:
 - 1.1 inconsistent with the policy of the organisation
 - 1.2 discrepancies within enquiry information
 - 1.3 tender procedure requirements
 - 1.4 quantitative requirements
 - 1.5 qualitative requirements
 - 1.6 contractual requirements
- 2 Tender - type:
 - 2.1 contractor
 - 2.2 sub/works/trade contractor
 - 2.3 supply
 - 2.4 consultants
- 3 Tender documents - type:
 - 3.1 invitation to tender
 - 3.2 form of tender
 - 3.3 surveys
 - 3.4 specifications
 - 3.5 bills of quantities
 - 3.6 models
 - 3.7 graphical and non-graphical electronic data files
 - 3.8 drawings, schedules and programmes
 - 3.9 health, safety and welfare requirements
 - 3.10 terms and conditions
 - 3.11 schedules of rates
 - 3.12 evaluation criteria and procedures
 - 3.13 environmental requirements
 - 3.14 procedures for submitting tenders
- 4 Agreed criteria:

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- 4.1 change to organisational capability
- 4.2 financial
- 4.3 viability of tendering information
- 4.4 current workload
- 4.5 type of work
- 4.6 competence of people
- 4.7 timescale (tender and contract)
- 4.8 social & political policies
- 4.9 environmental impact
- 4.10 location
- 4.11 potential competition
- 5 Tender requirements:
 - 5.1 construction
 - 5.2 installation and maintenance work
 - 5.3 supply of goods and materials
 - 5.4 consultancy services
- 6 Legal issues:
 - 6.1 planning
 - 6.2 health and safety
 - 6.3 environmental
 - 6.4 ownerships
 - 6.5 common law rights
 - 6.6 European Union requirements

Finalise and submit a tender

- 7 Risks and opportunities:
 - 7.1 environmental
 - 7.2 financial and market fluctuations
 - 7.3 social and political
 - 7.4 technical

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- 7.5 health and safety
- 7.6 reputation
- 7.7 competence of people
- 7.8 time and resources
- 8 Tender
 - 8.1 contracting
 - 8.2 sub/works/trade contracting
 - 8.3 supply
 - 8.4 consultancy
- 9 Alternatives and/or qualifications:
 - 9.1 specifications and materials
 - 9.2 methods of construction
 - 9.3 services
 - 9.4 time-scales
 - 9.5 supply options
 - 9.6 price offer options
- 10 Tender requirements:
 - 10.1 form of tender
 - 10.2 construction
 - 10.3 installation and maintenance work
 - 10.4 supply of goods and materials
 - 10.5 consultancy services
 - 10.6 low carbon & resource efficient procurement
 - 10.7 purchasing
 - 10.8 technology required
 - 10.9 procedures for submitting tenders

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