

COSCCOMO12 - SQA Unit Code FM7D 04

Obtain tenders and appoint successful contractors in construction contracting operations management



Overview

This unit is about shortlisting and selecting appropriate tenderers. It is also about the review and amendment of tender documents and ensuring that addendums are issued.

You will need to develop a potential list of tenderers who meet the contract criteria. You will also need to send tender enquiries to potential tenderers and evaluate those that respond in order to shortlist them against chosen selection criteria.

You will need to identify documents which are suitable for the type of procurement and evaluate options against relevant criteria. You will also need to select options for documents. You will then need to forecast the prime cost, provisional sums and contingencies and prepare a bill of preliminaries. You will also need to check final drafts.

You will need to select an appropriate tender and ensure that tender documents are issued. You will also need to investigate any queries, errors or omissions reported by tenderers, amend tender documents and ensure that addendums are reissued.

You will need to acknowledge and evaluate tenders against the criteria and if necessary modify and repeat tendering processes in consultation with the client. You will need to choose the best tenderers to appoint them formally and notify unsuccessful tenderers. You will also need to negotiate and agree any variations, adjustments and corrections with tenderer(s) subject to contract.

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Performance criteria

You must be able to:

Shortlist tenderers

- P1 select an appropriate type of **procurement process** which aligns with legal, statutory and organisational requirements and decide which potential **tenderers** could meet the contract conditions
- P2 decide how many **tenderers** to invite, taking into account the value and size of the contract
- P3 choose **selection criteria** which are suitable to weight and rate performance for the type of work described in the tender
- P4 send tender enquiries to potential **tenderers**, for them to provide **evidence** about their experience, capability and availability to carry out the work
- P5 evaluate potential **tenderers** who respond to the enquiry against the **selection criteria**, in order to short list **tenderers**
- 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 add more potential **tenderers** from the evaluation list which meet the **selection criteria** if those contacted are not willing or able to tender

Select documents

You must be able to:

- P8 identify **documents** which are suitable for the type of **procurement** and evaluate the options against **relevant criteria**
- P9 select valid options for **documents**, discuss them with the client and other people who have an interest and agree a form
- P10 include within the **documents** and descriptions, changes, clarifications and corrections arising from the source **documents** and the brief
- P11 forecast the prime cost, provisional sums and contingencies so that they can be included in the **documents**
- P12 prepare accurate **documents** which describe the needs of the contractor and the client
- P13 obtain necessary **checks and approvals**
- P14 check the final draft **documents** and approve those which are accurate for production and issuing

Obtain tenders

You must be able to:

- P15 select an appropriate type of **tender**
- P16 ensure that all required **tender information and documents** are issued in accordance with agreed procedures
- P17 investigate any queries, errors, omissions and ambiguities which are reported by **tenderers**

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- P18 amend the **tender information and documents** to correct them and ensure that addendums are re-issued
- P19 agree and implement action when **tenderers** withdraw from the process
- P20 keep records of **tender information and documents** issued, feedback, **queries and information** from **tenderers**

Evaluate tenders and appoint contractors

You must be able to:

- P21 acknowledge and evaluate the **tenders** received against the agreed **criteria**
- P22 modify and/or repeat the tendering processes in consultation with the client if too few tenders are received
- P23 check with **tenderers** if any discrepancies, omissions and errors are found in the tenders, and make any amendments which **tenderers** authorise
- P24 choose the tender which best meets the **criteria**
- P25 negotiate and agree any **variations, adjustments and corrections** with the most appropriate **tenderer** and confirm them in writing, subject to contract
- P26 appoint the successful **tenderer** formally and notify **tenderers** who have been unsuccessful, about the result

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Knowledge and understanding

You need to know and understand:

Shortlist tenderers

- K1 how and why to select an appropriate type of **procurement process** which aligns with legal, statutory and organisational requirements and decide which potential **tenderers** could meet the contract conditions (evaluation)
- K2 how and why to decide how many **tenderers** to invite, taking into account the value and size of the contract (evaluation)
- K3 how and why to choose **selection criteria** which are suitable to weight and rate performance for the type of work described in the tender (evaluation)
- K4 how to send tender enquiries to potential **tenderers**, for them to provide **evidence** about their experience, capability and availability to carry out the work (application)
- K5 how and why to evaluate potential **tenderers** who respond to the enquiry against the **selection criteria**, in order to short list **tenderers** (evaluation)
- K6 how and why to offer advice and information to decision makers about potential **tenderers** and the **selection criteria** (synthesis)
- K7 how to modify the **tender** list to reflect any changes which are agreed (application)
- K8 how to add more potential **tenderers** from the evaluation list which meet the **selection criteria** if those contacted are not willing or able to tender (application)

Select documents

You need to know and understand:

- K9 what to identify as **documents** which are suitable for the type of **procurement** (understanding)
- K10 how and why to evaluate the options for **documents** against **relevant criteria** (evaluation)
- K11 how and why to select valid options for **documents** (evaluation)
- K12 how and why to discuss valid options with the client and other people who have an interest (synthesis)
- K13 how and why to agree a form of options with the client and other people who have an interest (evaluation)
- K14 how to include within the **documents** and descriptions, changes, clarifications and corrections arising from the source **documents** and the brief (application)

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- K15 how and why to forecast the prime cost, provisional sums and contingencies so that they can be included in the **documents** (analysis)
- K16 how to prepare accurate **documents** which describe the needs of the contractor and the client (application)
- K17 how to obtain necessary **checks and approvals** (application)
- K18 how to check the final draft **documents** and approve those which are accurate for production and issuing (application)

Obtain tenders

You need to know and understand:

- K19 how and why to select appropriate types of **tender** (evaluation)
- K20 how to ensure that all **tender information and documents** are issued in accordance with agreed procedures (application)
- K21 how and why to investigate any queries, errors, omissions and ambiguities which are reported by tenderers (analysis)
- K22 how to amend the **tender information and documents** to correct them (application)
- K23 how to ensure that addendums are re-issued (application)
- K24 how and why to agree action when **tenderers** withdraw from the process (evaluation)
- K25 how to implement action when **tenderers** withdraw from the process (application)
- K26 how to keep records of **tender information and documents** issued, feedback, **queries and information** from **tenderers** (application)

Evaluate tenders and appoint contractors

You need to know and understand:

- K27 how to acknowledge the **tenders** received (application)
- K28 how to evaluate the tenders received against the agreed **criteria** (evaluation)
- K29 how to modify and/or repeat the tendering processes in consultation with the client if too few tenders are received (application)
- K30 how to check with **tenderers** if any discrepancies, omissions and errors are found in the tenders, and make any amendments which **tenderers** authorise (application)
- K31 how and why to choose the tender which best meets the **criteria** (evaluation)
- K32 how and why to negotiate any **variations, adjustments and**

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corrections with the most appropriate **tenderer** (synthesis)

- K33 how and why to agree any **variations, adjustments and corrections** with the most appropriate **tenderer** (evaluation)
- K34 how to confirm in writing any **variations, adjustments and corrections** with the most appropriate **tenderer** subject to contract (application)
- K35 how to appoint the successful **tenderer** formally (application)
- K36 how to notify **tenderers** who have been unsuccessful, about the result (application)

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Scope/range

Shortlist tenderers

- 1 Procurement process:
 - 1.1 open competitive
 - 1.2 two stage tender
 - 1.3 selected list
 - 1.4 negotiated
- 2 Tenderers:
 - 2.1 contractors
 - 2.2 sub/works/trade contractors
 - 2.3 suppliers
 - 2.4 consultants
- 3 Selection criteria:
 - 3.1 quality and delivery record
 - 3.2 perceived added value (including reputation of potential contractors and past performance)
 - 3.3 acceptability of known sub-contracting and organisational supply chain arrangements
 - 3.4 acceptability to client
 - 3.5 financial resources
 - 3.6 references from previous clients and bankers
 - 3.7 health, safety and welfare record
 - 3.8 human resource records
 - 3.9 competence of people
 - 3.10 Building Information Modelling capability
 - 3.11 systems compatibility
 - 3.12 resources (human, materials, facilities)
 - 3.13 insurance
 - 3.14 environmental policy and management record
 - 3.15 innovation record
 - 3.16 local economic benefit

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4 Evidence:

- 4.1 documentary
- 4.2 references
- 4.3 interview

Select documents

5 Documents:

- 5.1 bills of quantities
- 5.2 drawings
- 5.3 specifications
- 5.4 standards
- 5.5 schedules
- 5.6 programmes

6 Procurement:

- 6.1 competitive tender - limited competition
- 6.2 open competition (including advertising)
- 6.3 competitive - negotiation
- 6.4 term award

7 Relevant criteria:

- 7.1 cost of production
- 7.2 time in preparation
- 7.3 suitability to the contract
- 7.4 form of project procurement
- 7.5 intended purpose

8 Checks and approvals:

- 8.1 format
- 8.2 presentation
- 8.3 accuracy
- 8.4 technical content
- 8.5 completeness

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- 8.6 referencing
- 8.7 cross-referencing and correlation with associated documents
- 8.8 spelling, grammar and punctuation
- 8.9 status

Obtain tenders

- 9 Tender:
 - 9.1 open competitive
 - 9.2 two stage
 - 9.3 selected list
 - 9.4 negotiated
- 10 Tender information and documents:
 - 10.1 invitation to tender
 - 10.2 form of tender
 - 10.3 surveys
 - 10.4 specifications
 - 10.5 bills of quantities
 - 10.6 models
 - 10.7 graphical and non-graphical electronic data files
 - 10.8 drawings, schedules and programmes
 - 10.9 health, safety and welfare requirements
 - 10.10 terms and conditions
 - 10.11 schedules of rates
 - 10.12 evaluation criteria and procedures
 - 10.13 environmental requirements
 - 10.14 procedures for submitting tenders
- 11 Tenderers:
 - 11.1 contractors
 - 11.2 sub/works/trade contractors
 - 11.3 suppliers

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11.4 consultants

12 Queries and information about:

12.1 price

12.2 quantity

12.3 quality

12.4 standards

12.5 logistics

12.6 completion

12.7 maintenance

12.8 after sales service

12.9 method of payment

12.10 terms of payment

12.11 contract conditions

12.12 survey information

12.13 timescales

12.14 contractual

12.15 administrative

12.16 technical

12.17 design

12.18 client amendment

Evaluate tenders and appoint contractors

13 Tenders:

13.1 open competitive

13.2 two stage

13.3 selected list

13.4 negotiated

14 Criteria

14.1 tender compliance

14.2 quality

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- 14.3 technical viability
- 14.4 timescale
- 14.5 cost (budgets, rates)
- 14.6 loading and cash flow
- 14.7 policies which offer added value
- 14.8 any variations, adjustments and corrections
- 14.9 comparative criteria (eg price indices, databases, trade journals, pre-tender estimates)
- 14.10 weighting
- 14.11 organisational policies
- 14.12 regulatory requirements
- 14.13 competence of people
- 14.14 Building Information Modelling capability
- 14.15 information delivery
- 14.16 design quality and costing
- 14.17 community benefits
- 14.18 best whole life value
- 14.19 open book accounting
- 15 Tenderers:
 - 15.1 contractors
 - 15.2 sub/works/trade contractors
 - 15.3 suppliers
 - 15.4 consultants
- 16 Variations, adjustments and corrections:
 - 16.1 price
 - 16.2 quantity
 - 16.3 quality
 - 16.4 standards
 - 16.5 logistics
 - 16.6 completion

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- 16.7 maintenance
- 16.8 after sales service
- 16.9 method of payment
- 16.10 terms of payment
- 16.11 contract conditions
- 16.12 survey information
- 16.13 timescales
- 16.14 contractual
- 16.15 administrative
- 16.16 technical
- 16.17 design
- 16.18 client amendment

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