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## Overview

This unit is concerned with obtaining tenders from contractors and subcontractors, and selecting the ones that you wish to action. The words “estimate”, “bid” and “tender” are all used in the industry, and are taken here to be synonymous.

It is about sending the tender documents out to the bidders. You must be able to find out who will be bidding, prepare the tender documents, send them out, deal with any queries, and keep records up to date.

It is about assessing the bids that you receive. You must be able to review the bids, check them for errors, agree any adjustments, and inform the bidders of the results.

**Performance  
criteria**

*You must be able to:*

- P1 send tender enquiries to potential **tenderers**, in accordance with contract requirements, and invite them to provide evidence about their experience, capability and resources
- P2 collate responses from potential **tenderers** and confirm and agree tender lists
- P3 prepare **tender documents** which meet statutory regulations, codes of practice and your organisational policies
- P4 issue **tender documents** to all the **tenderers** on the agreed list, following the agreed procedures
- P5 investigate any errors, omissions and ambiguities which are reported by **tenderers**, amend the **tender documents** to correct them and pass the information to all the **tenderers**
- P6 keep accurate records of **tender documents** issued, feedback, **queries and information** from **tenderers**
- P7 store the tenders received in a secure place and open them at the agreed date and time in line with organisational procedures
- P8 review the tenders against the criteria for acceptance, including checking for discrepancies, omissions and errors, and recommend **appropriate action**
- P9 discuss and recommend any **variations, adjustments and corrections** with the successful tenderer and confirm them in writing, subject to contract

## Knowledge and understanding

*You need to know and understand:*

- K1 how to send tender enquiries to potential **tenderers** to invite evidence about their experience, capability and resources (application)
- K2 how to collate responses from potential tenderers and confirm tender lists (application)
- K3 how and why to agree tender lists (evaluation)
- K4 how and why to prepare **tender documents** (synthesis)
- K5 how to issue **tender documents** to all **tenderers** on the agreed tender list (application)
- K6 how and why to investigate any errors, omissions and ambiguities which are reported by **tenderers** (analysis)
- K7 how to amend the **tender documents** to correct any errors, omissions or ambiguities which are reported by **tenderers** (application)
- K8 how to pass on to all the **tenderers** the information relating to amendments to **tender documents** (application)
- K9 how to keep accurate records of **tender documents** issued, feedback, **queries and information** from **tenderers** (application)
- K10 how to store and open the **tenders** received in line with organisational procedures (application)
- K11 how and why to review the tenders (analysis)
- K12 how to check for any discrepancies, omissions and errors (application)
- K13 how and why to recommend **appropriate action** (synthesis)
- K14 how and why to discuss and recommend any **variations, adjustments and corrections** with the successful **tenderer** (synthesis)

**Scope/range**

- 1 Tenderers:
  - 1.1 contractors
  - 1.2 sub/works/trade contractors
  - 1.3 suppliers
  - 1.4 consultants
- 2 Tender documents:
  - 2.1 invitation to tender
  - 2.2 form of tender
  - 2.3 returns procedure
  - 2.4 surveys
  - 2.5 specifications
  - 2.6 drawings
  - 2.7 schedules
  - 2.8 bills of quantities
  - 2.9 health and safety plans
  - 2.10 scope of services
  - 2.11 terms and conditions
  - 2.12 schedules of rates
- 3 Queries and information about:
  - 3.1 price
  - 3.2 quantity
  - 3.3 quality
  - 3.4 standards
  - 3.5 carriage and delivery
  - 3.6 completion
  - 3.7 maintenance
  - 3.8 after sales service
  - 3.9 method of payment
  - 3.10 terms of payment
  - 3.11 contract conditions
  - 3.12 survey information
  - 3.13 time
  - 3.14 contractual

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**Scope/range**

- 3.15 administrative
- 3.16 technical
- 3.17 warranties
- 4 Appropriate action:
  - 4.1 accept for evaluation
  - 4.2 invite clarification or amendment
  - 4.3 reject
- 5 Variations, adjustments and corrections:
  - 5.1 price
  - 5.2 quantity
  - 5.3 quality
  - 5.4 time

COSBEDO10 - SQA Unit Code H6AD 04

Obtain and assess tenders in built environment design



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**Developed by** ConstructionSkills

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**Status** Original

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**Relevant occupations** Civil engineers; graphic designers; architectural technologists; town planning technicians; draughtspersons; building surveyors

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**Suite** Built Environment Design

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**Keywords** obtain tenders; assess tenders

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