



Regulated Qualifications Unit and Assessment Specification

Unit title	Prepare and Process Invitations to Tender in Construction
Regulator unit code	R/616/7296
SQA unit code	H7SC 79
SSC Ref	COSCCOO07

History of changes

Publication date: August 2014

Version: 02 (July 2017)

Version number	Date	Description	Authorised by
02	July 2017	Unit Specification updated to reflect current Ofqual terminology	Qualifications Officer

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Regulated Qualifications Unit specification

Title	Prepare and Process Invitations to Tender in Construction	
Level	3	
Credit value	16	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1 Be able to identify potential tenderers.	1.1	Identify a list of potential tenderers able to meet the contract criteria and suitable for pre-qualification.
	1.2	Offer advice and information to decision makers about potential tenderers and the selection criteria.
	1.3	Obtain pre-qualification information about potential tenderers to confirm evidence about their experience and capability and availability to carry out the work.
	1.4	Evaluate potential tenderers who respond to the pre-qualification enquiry against the selection criteria in order to short-list.
	1.5	Confirm that the selected tenderers are willing to bid and, if necessary, refer to the original long list.
2 Understand how to identify potential tenderers.	2.1	Describe how to identify a list of potential tenderers.
	2.2	Propose how to offer advice and information to decision makers about potential tenderers and the selection criteria.
	2.3	Explain how to obtain pre-qualification information about potential tenderers to confirm evidence about their experience and capability and availability to carry out the work.
	2.4	Evaluate potential tenderers against the selection criteria in order to short list.
	2.5	Explain how to confirm that the selected tenderers are willing to tender.

Learning Outcomes	Assessment Criteria
The learner will:	The learner can:
<p>3 Be able to prepare and issue tender documents.</p>	<p>3.1 Draft and review appropriate tender documents in relevant formats to ensure that they cover the scope of the works, contract and client requirements.</p> <p>3.2 Ensure that all tender documents are issued in accordance with agreed procedures.</p> <p>3.3 Record any changes required by the client.</p> <p>3.4 Identify any changes which are reported and amend the tender documents and ensure that addendums are re-issued.</p> <p>3.5 Keep accurate records of tender documents issued, feedback and identified changes.</p> <p>3.6 Implement action when tenderers withdraw from the process.</p>
<p>4 Understand how to prepare and issue tender documents.</p>	<p>4.1 Evaluate how to draft appropriate tender documents.</p> <p>4.2 Examine how to review tender documents.</p> <p>4.3 Explain how to ensure that tender documents are issued in accordance with agreed procedures.</p> <p>4.4 Explain how to record any changes required by the client.</p> <p>4.5 Describe what to identify as any reported changes.</p> <p>4.6 Explain how to amend the tender documents.</p> <p>4.7 Explain how to ensure that addendums are re-issued.</p> <p>4.8 Explain how to keep accurate records of tender documents issued, feedback and identified changes.</p>

Learning Outcomes The learner will:	Assessment Criteria The learner can:
	4.9 Explain how to implement action when tenderers withdraw from the process.
5 Be able to check tenders.	5.1 Acknowledge and check the tenders received against the agreed criteria. 5.2 Modify and repeat the tendering processes if too few tenders are received to show that there has been adequate competition. 5.3 Check with tenderers if any discrepancies, omissions and errors are found in the tenders, and record any amendments which tenderers authorise. 5.4 Identify tenders which meet the criteria.
6 Understand how to check tenders.	6.1 Explain how to acknowledge the tenderers received. 6.2 Explain how to check the tenderers received against the agreed criteria. 6.3 Explain how to modify and repeat the tendering processes if too few tenders are received to show that there has been adequate competition. 6.4 Explain how to check with tenderers if any discrepancies, omissions and errors are found in the tenders and record any amendments which tenderers authorise. 6.5 Describe what to identify as the tenders which meet the criteria.

Additional information about the unit
Unit purpose and aim(s)
<p>This unit is about identifying and pre-qualifying tenderers such as sub-contractors and suppliers, and producing and issuing tender documents. You will need to identify and list potential tenderers, send out pre-qualification enquiries, evaluate responses and confirm the tender list.</p> <p>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.</p> <p>You will need to check tenders received against agreed criteria and recommend the tender which best meets the criteria.</p>
Unit start date
01 August 2014
Details of the relationship between the unit and relevant national occupational standards (if appropriate)
The unit sets out the competence and knowledge specification for COSCCOO07 in Construction Contracting Operations.
Details of the relationship between the unit and other standards or curricula (if appropriate)
N/A
Assessment requirements specified by a sector or regulatory body (if appropriate)
<p>The following ranges apply: Learning Outcomes 1 and 2</p> <ul style="list-style-type: none"> ◆ Tenderers: <ul style="list-style-type: none"> — contractors — sub/works/trade contractors — suppliers — consultants ◆ Evidence: <ul style="list-style-type: none"> — documentary — references — interview

Additional information about the unit (cont)

Assessment requirements specified by a sector or regulatory body (if appropriate)

- ◆ 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
 - innovation
 - local economic benefit

Learning Outcomes 3 and 4

- ◆ Tender:
 - open competitive
 - two stage
 - selected list
 - negotiated
- ◆ Documents:
 - invitation to tender
 - form of tender
 - returns procedure
 - surveys
 - specifications
 - drawings
 - schedules
 - bills of quantities
 - health, safety and welfare requirements
 - scope of services
 - terms and conditions
 - schedules of rates
 - evaluation criteria and procedures
 - environmental requirements
 - procedures for submitting tenders
- ◆ Formats:
 - paper
 - electronic
- ◆ Client requirements:
 - preferred suppliers
 - confidentiality
 - publicity restrictions
 - local and economic benefits
 - industry accreditation
 - workforce accreditation
 - agreed conservation value

Additional information about the Unit (cont)

Assessment requirements specified by a sector or regulatory body (if appropriate)

- ◆ Changes:
 - price
 - quantity
 - quality
 - standards
 - carriage and delivery
 - completion
 - maintenance
 - after sales service
 - method of payment
 - terms of payment
 - contract conditions
 - survey information
 - timescales
 - client amendment
- ◆ Tenderers:
 - contractors
 - sub/works/trade contractors
 - suppliers
 - consultants

Learning Outcomes 5 and 6

- ◆ Tenderers:
 - contractors
 - sub/works/trade contractors
 - suppliers
 - consultants
- ◆ Criteria:
 - tender compliance
 - quality
 - technical viability
 - timescale
 - cost (budgets, rates)
 - loading and cash flow
 - policies which offer added value
 - any variations, adjustments and corrections

This Unit must be assessed in a work environment, in accordance with:

- ◆ the Additional Requirements for Qualifications using the title NVQ in QCF
- ◆ the ConstructionSkills' Consolidated Assessment Strategy for Construction and the Built Environment.

Assessors for this Unit must have verifiable, current industry experience and a sufficient depth of relevant occupational expertise and knowledge, and must use a combination of assessment methods as defined in the Consolidated Assessment Strategy.

Workplace evidence of skills cannot be simulated.

Additional information about the unit (cont)
Endorsement of the unit by a sector or other appropriate body (if required)
CITB
Location of the unit within the subject/sector classification system
4.1 Engineering, 5.2 Building and Construction
Name of the organisation submitting the unit
CITB
Guided Learning Hours
60

Regulated Qualifications Assessment specification

Assessment (evidence) requirements

The evidence requirements for this unit are shown in the main body of the unit under the section titled 'Assessment requirements or guidance specified by a sector or regulatory body'.

Guidance on methods/instruments of assessment

Occupational skills (OS) unit

This unit is designed to assess the skills of learners in the workplace. Observation of learner performance can only be carried out on-the-job and should always be the primary and preferred source of evidence of competent performance.

Collection of supplementary evidence of performance can be used to further substantiate, support and expand the evidence base for competent performance where this is necessary. This may arise in situations where evidence from direct observation of the learners on-the-job is deemed insufficient to fully meet the required standards. Supplementary evidence may include:

- ◆ witness testimony
- ◆ questioning
- ◆ professional discussion
- ◆ product and photographic evidence
- ◆ relevant active documentation, reports, presentations
- ◆ other valid evidence which relates directly to learner performance on-the-job

SQA's Guide to Assessment is designed to provide support for everyone who assesses for SQA qualifications. It looks at the principles of assessment, and brings together information on assessment in general as well as on best practice in assessment. The Guide to Assessment can be downloaded free from SQA's website www.sqa.org.uk.