



Regulated Qualifications Unit and Assessment Specification

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| Unit title | Prepare Estimates, Bids and Tenders in Construction |
| Regulator unit code | K/616/7305 |
| SQA unit code | H7SD 79 |
| SSC Ref | COSCCOO08 |

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

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| Title | Prepare Estimates, Bids and Tenders in Construction | |
| Level | 3 | |
| Credit value | 16 | |
| Learning Outcomes | Assessment Criteria | |
| The learner will: | The learner can: | |
| 1 Be able to evaluate estimate, bid and tender enquiry documentation. | 1.1 | Review and summarise the tender details and tender requirements. |
| | 1.2 | Identify any points of concern in the tender and refer them to decision makers for them to clarify and resolve. |
| | 1.3 | Evaluate the tender documents against the organisational capability and make recommendations to line managers. |
| | 1.4 | Make recommendations about tender requirements and potential alternatives, within the limits of the tender information which is available, and which provide an objective basis for making a decision on whether to make a bid. |
| | 1.5 | Maintain records about tender enquiries in confidence and only pass them on to people who have the authority to receive them. |
| 2 Understand how to be able to evaluate estimate, bid and tender enquiry documentation. | 2.1 | Examine how to review the tender details and tender requirements. |
| | 2.2 | Explain how to summarise the tender details and tender requirements. |
| | 2.3 | Describe what to identify as any points of concern in the tender and refer them to decision makers for them to clarify and resolve. |
| | 2.4 | Evaluate the tender documents against the organisational capability and make recommendations to line managers. |

| Learning Outcomes | Assessment Criteria |
|---------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>The learner will:</p> | <p>The learner can:</p> <p>2.5 Propose how to make recommendations about tender requirements and potential alternatives, within the limits of the tender information which is available, and which provide an objective basis for making a decision on whether to make a bid.</p> <p>2.6 Explain how to maintain records about tender enquiries in confidence and only pass them on to people who have the authority to receive them.</p> |
| <p>3 Be able to calculate, quantities, resources and costs within a tender.</p> | <p>3.1 Assemble and collate information and identify which categories of work require measurement.</p> <p>3.2 Review information to decide how to measure dimensions and calculate quantities methodically and in a way which conforms to relevant conventions, standard methods and standard phraseology.</p> <p>3.3 Calculate the quantities and prepare descriptions accurately, collate and sequence them correctly and present them in a way which meets their intended purpose.</p> <p>3.4 Calculate accurately, from available sources, what resources will be needed and investigate whether the resources will be available.</p> <p>3.5 Estimate resource costs by calculating an accurate cost for each item which is required.</p> <p>3.6 Develop a proposed method statement and draft programme which meet the tender enquiry requirements.</p> <p>3.7 Modify the cost to take into account any external factors which may affect the cost projections.</p> |

| Learning Outcomes | | Assessment Criteria | |
|--------------------------|------------------------------------------------------------------------------------------|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The learner will: | | The learner can: | |
| 4 | Understand how to be able to calculate, quantities, resources and costs within a tender. | 4.1 | Explain how to assemble and collate information. |
| | | 4.2 | Describe what to identify as categories of work requiring measurement. |
| | | 4.3 | Examine how to review information to decide how to measure dimensions and quantities. |
| | | 4.4 | Explain how to calculate the quantities and prepare descriptions accurately, collate and sequence them correctly and present them in a way which meets their intended purpose. |
| | | 4.5 | Explain how to calculate accurately, from available sources, what resources will be needed. |
| | | 4.6 | Examine how to investigate whether the resources will be available. |
| | | 4.7 | Examine how to estimate resource costs by calculating an accurate cost for each item which is required. |
| | | 4.8 | Propose how to develop a proposed method statement and draft programme which meet the tender enquiry requirements. |
| | | 4.9 | Explain how to modify the cost to take into account any external factors which may affect the cost projections. |
| 5 | Be able to collate and present tender information. | 5.1 | Refer quantity, resource and cost information to decision makers. |
| | | 5.2 | Collate and produce the overall estimate of costs and checking that it is complete, accurate and in a form which is suitable for a judgment to be made. |
| | | 5.3 | Explain and clarify the projected costs to support the calculations. |

| Learning Outcomes The learner will: | Assessment Criteria The learner can: |
|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | 5.4 Contribute to payment schedules which will meet known cash flow requirements. 5.5 Collate, arrange and present tender offer information in accordance with procurement requirements to line manager. |
| 6 Understand how to be able to collate and present tender information. | 6.1 Explain how to refer quantity, resource and cost information to decision makers. 6.2 Explain how to collate and produce the overall estimate of costs and checking that it is complete, accurate and in a form which is suitable for a judgment to be made. 6.3 Explain and clarify the projected costs to support the calculations. 6.4 Explain how to contribute to payment schedules which will meet known cash flow requirements. 6.5 Explain how to collate, arrange and present tender offer information in accordance with procurement requirements to line manager. |

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| Additional information about the unit |
| Unit purpose and aim(s) |
| <p>This unit is about the evaluation of tender enquiries, identifying and making necessary measurements and producing estimates by costing resources. You will need to check and summarise tender details and identify points of concerns. You will need to make recommendations about tenders and maintain records.</p> <p>You will need to assemble, collate and review information and measure quantities and prepare descriptions. You will need to identify inaccurate information and deal with it appropriately. You will need to develop working documents, calculate resource requirements, estimate costs, allowing for external factors, and produce an overall estimate. You will need to explain the costings and produce payment schedules.</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 COSCCOO08 in Construction Contracting Operations. |
| Details of the relationship between the unit and other standards or curricula (if appropriate) |
| N/A |
| Endorsement of the unit by a sector or other appropriate body (if required) |
| CITB |
| 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"> ◆ Tender — type: <ul style="list-style-type: none"> — contractor — sub/works/trade contractor — supply — consultancy ◆ Tender requirements: <ul style="list-style-type: none"> — construction — installation and maintenance work — supply of goods and materials — consultancy services |

Additional information about the unit (cont)

Endorsement of the Unit by a sector or other appropriate body (if required)

- ◆ Decision makers:
 - clients and their agents
 - colleagues
 - line managers
 - specialists — internal or external to organisation
- ◆ Points of concern:
 - inconsistent with the policy of the organisation
 - discrepancies within enquiry information
 - tender procedure requirements
 - quantitative requirements
 - qualitative requirements
 - contractual requirements
- ◆ Tender documents — type:
 - invitation to tender
 - form of tender
 - returns procedure
 - survey reports
 - specifications
 - drawings
 - schedules
 - bills of quantities
 - health and safety & welfare policies
 - environmental policies
 - scope of services
 - terms and conditions
 - schedule of rates
 - procedures for submitting tenders
 - evaluation criteria and procedures
- ◆ Organisational capability:
 - financial
 - viability of tendering information
 - current workload
 - type of work
 - competence of people
 - timescale (tender & contract)
 - social policies
 - environmental impact
 - location
 - social and political policies

Learning Outcomes 3 and 4

- ◆ Information:
 - drawings
 - schedules

Additional information about the unit (cont)

Endorsement of the Unit by a sector or other appropriate body (if required)

- specifications
- information about the contract and allocation of risks and responsibilities
- quotations
- records of queries raised and answers
- standard methods of measurement
- technical literature
- ◆ Measurement — relates to:
 - trade
 - elemental
 - operational
 - approximate
 - schedules of rates
- ◆ Measure dimensions and calculate quantities:
 - manual
 - electronic
- ◆ Calculate cost:
 - manual
 - electronic
- ◆ Estimate:
 - cost based on a quotation
 - Unit cost built up from basic data
 - internal and historical cost data
 - published cost data
- ◆ Intended purpose:
 - procurement
 - contract
 - production
- ◆ Resources — type:
 - people (in-house, external)
 - plant and equipment
 - materials
 - finance
 - time
 - supply options
- ◆ Tender requirements:
 - 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

Additional information about the unit (cont)**Endorsement of the Unit by a sector or other appropriate body (if required)**

- schedules of rates
- evaluation criteria and procedures
- environmental requirements
- procedures for submitting tenders
- ◆ External factors:
 - variations over time
 - geographic location
 - statutory and contractual requirements
 - special working conditions and methods
 - special resourcing conditions and availability

Learning Outcomes 5 and 6

- ◆ Explain and clarify:
 - orally
 - written
 - electronic
- ◆ Tender offer
 - contractor
 - sub/works/trade contractor
 - supply
 - consultancy
 - purchase

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.

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

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| Additional information about the unit (cont) |
| 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.