![Australian Government - Department of Education, Employment and Workplace Relations]

CPPDSM5036A Prepare tender documentation in the property industry

Release: 1

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CPPDSM5036A Prepare tender documentation in the property industry

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit of competency specifies the outcomes required to prepare tender documentation for property or facility management and maintenance operations. It requires the ability to determine property requirements accurately, develop detailed budgets, and prepare documentation according to established tender criteria and conditions.
	The unit may form part of the licensing requirements for persons working in the property industry, including in the real estate, business broking, stock and station agency and property operations and development sectors, in those States and Territories where these are regulated activities.

Application of the Unit

Application of the unit	This unit of competency supports the work of those involved in preparing tender documentation for property or facility management and maintenance operations.

Licensing/Regulatory Information

Refer to Unit Descriptor

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Pre-Requisites

Prerequisite units   Nil

Employability Skills Information

Employability skills   The required outcomes described in this unit of competency contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit of competency is packaged, will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where *bold italicised* text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Determine tender requirements.	1.1 Tender brief and other relevant *documentation* are obtained and analysed to establish tender requirements in consultation with *relevant people*.
	1.2 *Viability* to comply with tender requirements is assessed against project specifications and organisational operational capacity.
	1.3 *Risk assessment* is conducted on anticipated project outcomes according to *organisational and legislative requirements*.
	1.4 Personal limitations in assessing tender requirements are identified and assistance is sought as required from relevant people.
	1.5 Relevant legislative requirements are interpreted and allowed for within parameters of tender requirements.
2 Estimate resource requirements.	2.1 Financial, physical and human resource requirements are determined according to tender requirements.
	2.2 Organisational rate schedules and conditions are applied to establish costings where appropriate according to organisational requirements.
	2.3 Factors that may affect capacity to meet tender requirements are identified through risk analysis and accounted for in resource estimates.
	2.4 Information is reviewed to ensure accuracy and a budget is determined to meet assessed tender and resource requirements.
3 Prepare tender documentation.	3.1 *Business equipment and technology* are used to gather and compile relevant information in a suitable format according to organisational requirements.
	3.2 Draft tender documentation is prepared that accurately reflects project requirements and complies with specific *tender criteria and conditions*.
	3.3 Draft tender documentation is distributed to relevant people to check that information is accurate and project requirements are clearly addressed.
	3.4 *Feedback* is sought and where appropriate incorporated into tender documentation.
	3.5 Final documentation is lodged within designated time lines and a copy securely maintained according to organisational requirements.

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills:

- computing skills to compile and present information, access the internet and web pages, prepare and complete online forms, lodge electronic documents and search online databases
- interpersonal skills to relate to people from a range of social, cultural and ethnic backgrounds and varying physical and mental abilities
- literacy and communication skills to access and interpret specific tender criteria and conditions and prepare required documentation using clear and comprehensible language
- numeracy skills to estimate resource requirements and create a budget
- project planning skills to plan, schedule and track activities
- proofreading and editing skills to revise, amend and finalise tender documentation
- research and evaluation skills to evaluate specifications to establish tender criteria and to undertake qualitative and quantitative research.

Required knowledge and understanding:

- contingency and risk assessment techniques
- contractual arrangements in relation to property management and maintenance
- customer service procedures and practices
- legal and ethical responsibilities, including:
  - maintaining client privacy and confidentiality
  - meeting environmental standards
  - providing accurate information
- local knowledge of the property operations and development market
- organisational pricing policy and procedures
- organisational structure, services and environment
- relevant federal and state or territory legislation and local government regulations related to:
  - anti-discrimination
  - consumer protection
  - environmental issues
  - equal employment opportunity (EEO)
  - financial probity
  - franchise and business structures
  - industrial relations
  - OHS

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REQUIRED SKILLS AND KNOWLEDGE

- privacy
- property sales, leasing and management
- tender layout, format and presentation methods
- tendering codes of practice.

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Overview of assessment	This unit of competency could be assessed through practical demonstration of preparing tender documentation for property or facility management and maintenance operations. Targeted written (including alternative formats where necessary) or verbal questioning to assess the candidate's underpinning knowledge would provide additional supporting evidence of competence. The demonstration and questioning would include collecting evidence of the candidate's knowledge and application of ethical standards and relevant federal, and state or territory legislation and regulations. This assessment may be carried out in a simulated or workplace environment.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	A person who demonstrates competency in this unit must be able to provide evidence of: • actively seeking feedback from clients and colleagues on tender requirements • following organisational procedures to produce tender documentation • gathering and collating information • knowledge of organisation's practices, ethical standards and legislative requirements associated with preparing tender documentation for property or facility management and maintenance operations • understanding methodologies and activities required to analyse tender requirements.
Context of and specific resources for assessment	Resource implications for assessment include: • access to suitable simulated or real opportunities and resources to demonstrate competence • assessment instruments that may include personal

planner and assessment record book

- access to a registered provider of assessment services.

Where applicable, physical resources should include equipment modified for people with disabilities.

Access must be provided to appropriate learning and/or assessment support when required.

Assessment processes and techniques must be culturally appropriate, and appropriate to the language and literacy capacity of the candidate and the work being performed.

Validity and sufficiency of evidence require that:

- competency will need to be demonstrated over a period of time reflecting the scope of the role and the practical requirements of the workplace
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the person's competence
- all assessment that is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through simulated project-based activity and must include evidence relating to each of the elements in this unit.

In all cases where practical assessment is used it will be combined with targeted questioning to assess the underpinning knowledge. Questioning will be undertaken in such a manner as is appropriate to the language and literacy levels of the candidate and any cultural issues that may affect responses to the questions, and will reflect the requirements of the competency and the work being performed.

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Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the performance criteria is detailed below. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Property ***documentation*** may include information relating to:	- agreements - building codes - company services - contracts - depreciation schedules - licences - operating costs - permits - plans - specifications.
Relevant people may include:	- clients - government agencies - industry regulators and associations - legal representatives - management and colleagues - principals.
Viability may include consideration of:	- available resources, equipment and supplies - compliance with regulations - financial considerations - geographical constraints - skills required for the provision of services - time constraints.
Risk assessment may include:	- identifying risks in isolation or as part of a broader risk management strategy, such as: - damage to property and equipment - environmental risks - equipment and system failures - financial and economic loss or failure - OHS - professional incompetence.
Organisational	access and equity principles and practice guidelines

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requirements may be outlined and reflected in:	- business and performance plans - complaint and dispute resolution procedures - goals, objectives, plans, systems and processes - legal and ethical requirements and codes of practice - mission statements and strategic plans - OHS policies, procedures and programs - policies and procedures in relation to client service - quality and continuous improvement processes and standards - quality assurance and procedure manuals.
Legislative requirements may be outlined and reflected in:	- Australian standards - codes of practice covering the market sector and industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas and electricity), and contract or common law - environmental and zoning laws affecting access security, access and property use - general duty of care to clients - home building requirements - local regulations and by-laws - privacy laws applying to owners, contractors and tenants - quality assurance and certification requirements - relevant federal, and state or territory legislation that affects organisational operation, including: - anti-discrimination and diversity - environmental issues - EEO - industrial relations - OHS - strata, community and company titles - tenancy agreements - trade practices laws and guidelines.
Business equipment and technology may include:	- computers and email - data storage devices - facsimile machines - internet, extranet and intranet - photocopiers - printers and scanners - software applications, such as databases and word applications.
Tender criteria and	eligibility for submission of tender

conditions may include:	• interview, meeting or presentation of tender
	• special requirements
	• submission date
	• tender document format.
Feedback may be sought from:	• clients and their legal representatives
	• supervisors and colleagues
	• formal and informal performance appraisals
	• workplace assessment.

Unit Sector(s)

Unit sector   Property development, sales and management

Competency field

Competency field   Property operations and development

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