

RTC5908A**Prepare estimates, quotes and tenders****Unit Descriptor**

Prepare estimates, quotes and tenders

Unit Sector

No sector assigned

ELEMENT**PERFORMANCE CRITERIA**

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| 1. Carry out preliminary planning activities for estimating, quoting and/or tendering | <p>1.1 Nature and scope of the project are identified in consultation with the client according to enterprise policy.</p> <p>1.2 Format, specifications and deadline for submission of the estimate, quote or tender are identified and confirmed with the client.</p> <p>1.3 Available relevant documentation is obtained and interpreted.</p> <p>1.4 Project site is inspected and reconciled with scaled drawings, project and other site plans in consultation with the client, agent or other authority.</p> |
| 2. Determine resource requirements | <p>2.1 Detailed project information and monetary sums are interpreted and recorded from client specifications.</p> <p>2.2 Size, type and quantity of required project resources are identified and estimated according to client specifications.</p> <p>2.3 Sources are identified and evaluated for the procurement of suitable project resources consistent with client requirements.</p> <p>2.4 Appropriate tools and equipment are selected and used to calculate the correct size, type and quantity of each resource item.</p> <p>2.5 Unit and total cost for each resource item are calculated and documented.</p> <p>2.6 Necessary and appropriate contingency sums to complete the estimate, quote or tender are interpreted and documented.</p> <p>2.7 Calculations are accurately recorded on a price summary sheet.</p> |
| 3. Prepare schedules for the estimate, quote or tender | <p>3.1 Works schedule is documented according to client specifications.</p> <p>3.2 Scheduling of resources is accurately documented consistent with the requirements of the works schedule.</p> <p>3.3 Scheduling of financial requirements is accurately documented according to enterprise guidelines.</p> |

4. Prepare and document the estimate, quote or tender for submission to the client
 - 4.1 Estimate, quote or tender price is calculated and checked according to enterprise guidelines.
 - 4.2 Costed **summaries** and works, resource and financial schedules are compiled according to client specifications.
 - 4.3 Quality assurance requirements, enterprise customer service procedures, conventional formatting and industry standards are strictly adhered to in the development of documentation.
 - 4.4 Total estimate, quotation and/or tender is completed accurately and submitted to the client within the specified deadline.
 - 4.5 Further information is provided and adjustments made according to client requirements.

KEY COMPETENCIES

What processes should be applied to this competency standard? There are a number of processes that are learnt throughout work and life, which are required in all jobs. They are fundamental processes and generally transferable to other work functions. Some of these are covered by the key competencies, although others may be added. The questions below highlight how these processes are applied in this competency standard. Following each question a number in brackets indicates the level to which the key competency needs to be demonstrated where 0 = not required, 1 = perform the process, 2 = perform and administer the process and 3 = perform, administer and design the process.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	Oral and written communication with clients, suppliers, consultants, government agencies, community organisations, industry contacts and others in the enterprise work team is required.	3
Collecting analysing and organising information	Information may be collected through research, consultation and own experience. This information will be analysed and organised in relation to the achievement of client objectives and available resources. Estimates, quotes and/or tenders, including statistical, logistical and financial data, will be generated.	3
Planning and organising activities	Activities of self and other staff are planned, and delegation may be used to develop estimates, quotes and tenders.	3
Working with others and in teams	Teamwork with staff and experts based on effective, timely communication and consultation will help to achieve deadlines for the submission of estimates, quotes and tenders.	3
Using mathematical ideas and techniques	Mathematical understanding will be required to evaluate, collate, calculate and present data regarding costs and resource requirements for the project.	3
Solving problems	Problems relating to the requirements of the client, availability of information, resources and equipment, and price variations may arise when estimating, quoting and tendering, and will require problem-solving skills.	3
Using technology	Technology will be required to record, store and communicate ideas and information. It will also be used to research relevant information, obtain and calculate data and produce an estimate, quote or tender.	3

RANGE STATEMENT

What type of project may apply to this standard?

The subject of the estimate, quote or tender may include works relating to agricultural production, horticultural production, amenity horticulture projects, or conservation and land management-related projects.

Who may be referred to as a client?	Clients may include the enterprise's management, or a private individual, company, community group, government agency or a combination of these entities.
What relevant documentation may be available for interpretation?	Documentation may include schematic and detailed drawings, tender specifications, specified items recorded on a tender title sheet, technical data, manufacturers' specifications, enterprise policies and procedures, catalogues, price lists, project plans, designs and management plans, client financial limitations and allocations, OHS standards, statutory requirements, Australian standards, Codes of Practice, quality assurance requirements, timeline specifications, and legislation, industrial awards and enterprise agreements relating to labour and works.
What issues may be assessed during a project site inspection?	Issues may include access, work conditions and work requirements.
What resources may be required for project works?	Resources may include materials, tools, equipment and machinery, labour hours, staffing levels, technical skills and management requirements, consultant time and contracted services.
What sources may be identified for project resources?	Sources may include suppliers, manufacturers, equipment and labour hire agencies, contractors, consultants, or the client enterprise which may already have some or all of the required resources on site or available for project implementation.
What tools and equipment may be used for estimating, quoting and tendering?	Tools and equipment may include computing hardware, accounting, drafting and project management software, calculators and manual drafting and accounting tools and equipment.
What factors may be included in works schedules?	Factors may include details of labour requirements, staged implementation and objectives, prioritising of work activities, and scheduling of works, resource orders and deliveries.
What enterprise guidelines may be relevant to this standard?	Enterprise guidelines may include compliance with industry best practice standards, enterprise customer service policy, legal requirements, insurance limitations and guidelines, and enterprise OHS policy.
What items may be included in summaries?	Items may include preliminary costs, summation of resource materials, equipment and labour required, and abstract sums.

What format may be utilised for documentation of the estimate, quote or tender?

Format may include hand written, typed and printed hard copy or electronic formats, and may also support audiovisual, slide and photographic presentation.

EVIDENCE GUIDE

What specific knowledge is needed to achieve the performance criteria?

Knowledge and understanding are essential to apply this standard in the workplace, to transfer the skills to other contexts and to deal with unplanned events. The knowledge requirements for this competency standard are listed below:

- Relevant State and Federal legislation, awards, enterprise agreements and management policies relating to labour hire and employment terms.
- Current pricing structures and options for supplies, services, contractors and consultants.
- Enterprise and industry standards and practices for formatting, organising and presenting financial and quantitative information.
- Business ethics in relation to confidentiality and the tendering process.

What specific skills are needed to achieve the performance criteria?

To achieve the performance criteria, appropriate literacy and numeracy levels as well as some complementary skills are required. These include the ability to:

- Communicate and negotiate orally and in writing with staff, management, clients, contractors, suppliers, manufacturers and consultants.
- Liaise effectively with difficult clients and resolve issues.
- Research and evaluate information.
- Carry out financial, logistical and spatial estimations and calculations.
- Comply with legislative requirements.

Are there other competency standards that could be assessed with this one?

This competency standard could be assessed on its own or in combination with other competencies relevant to the job function.

Essential Assessment Information

There is essential information about **assessing this competency standard for consistent performance** and **where and how it may be assessed**, in the Assessment Guidelines for this Training Package. All users of these competency standards must have **access** to both the **Assessment Guidelines** and the relevant **Sector Booklet**.