



Australian Government

Department of Education, Employment and Workplace Relations

PRMWM31B Prepare detailed tender

Release: 1

PRMWM31B Prepare detailed tender

Modification History

Not Applicable

Unit Descriptor

Unit descriptor

This unit of competency describes the process of preparing a detailed tender. It requires the ability to determine system requirements, estimate costs, and document and confirm quotations with clients. Competency also requires a knowledge of communication and problem-solving techniques to promote customer confidence. These work functions would be carried out under limited supervision within organisational guidelines.

Application of the Unit

Not Applicable

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Not Applicable

Elements and Performance Criteria Pre-Content

Not Applicable

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Analyse tender requirements	1.1 Identify <i>client</i> waste management service requirements including OHS issues 1.2 Identify specific <i>tendering criteria and conditions</i> to ensure submission conforms to tender requirements
2 Determine ability to meet tender requirements and conditions	2.1 Make <i>assessment of the ability to provide the waste management service</i> in accordance with tender requirements and conditions 2.2 Assess <i>viability</i> of tendering for the provision of the waste management service
3 Estimate costs	3.1 Apply <i>organisation's rate schedules</i> and/or industry-based labour rates and conditions to establish costing where appropriate, according to organisational policy and procedures 3.2 Obtain quotations from external suppliers to ensure fair comparisons between suppliers 3.3 Confirm availability of labour, equipment, materials and other relevant items according to <i>organisational requirements</i> 3.4 Identify factors which may affect meeting client requirements through site inspection and make allowances for <i>contingencies</i> based on findings 3.5 Review all information to ensure accuracy and prepare detailed budget according to organisational and <i>submission requirements</i>
4 Prepare tender submission	4.1 Prepare tender using clear and concise language to explain benefits and rationale for security system/services, in accordance with organisational standards relating to style and format 4.2 Check tender for accuracy to ensure it clearly documents client waste management requirements and reflects submission requirements 4.3 Contact client, where possible prior to submission of tender, to discuss waste management requirements and make any necessary amendments according to organisational policy and procedures 4.4 Lodge tender with client within designated

ELEMENT	PERFORMANCE CRITERIA
5 Complete tender submission process	<p>timeframe and store a copy in accordance with organisational requirements</p> <p>5.1 Outline waste management service/benefits in a professional manner that allows the client opportunities for questions, when required</p> <p>5.2 Confirm written agreement to tender submission by both parties without delay and in accordance with legal and organisational procedures</p> <p>5.3 Seek details on outcomes of tender submission and review process to identify areas for improvement to support future tendering procedures and processes</p> <p>5.4 Update relevant documentation accurately and promptly and store in accordance with organisational procedures</p>

Required Skills and Knowledge

Refer to Evidence Guide

Evidence Guide

EVIDENCE GUIDE

Critical aspects of competency

- Correctly identifies all client waste management requirements.
- Correctly identifies all tendering criteria and conditions.
- Correctly assesses ability to provide service and of viability of tendering.
- Accurately determines prices and estimates for service, labour, equipment, materials and other relevant items.
- Ensures availability of equipment/materials.
- Preparation of a detailed budget.
- Makes allowances for contingencies
- Provides full details of service provision
- Discusses service options, where possible, to enable amendments prior to tender submission.
- Presents tender professionally, explains all details and allows questions and discussion.
- Obtains agreement on tender submission, where appropriate.

Knowledge needed to achieve the performance criteria

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

- Basic services offered.
- Basic requirements for service provision.
- Company pricing schedules.
- Presentation standards.
- Legislative and company pricing policy and procedures.
- Relevant industry standards and codes of conduct.
- Problem-solving strategies.
- Organisational and client confidentiality requirements.
- Recording procedures and documentation requirements and processes.
- Duty of care in provision of services.
- Relevant industry standards.
- OHS and other relevant legislation.
- OHS hierarchy of control.

Specific skills needed to achieve the performance criteria

To achieve the performance criteria, some complementary skills are required. These are:

- communication including liaison, customer service, negotiating, report writing, consultation, interpersonal, gaining feedback, giving information, presenting to a group
- observation
- coordination
- project management
- numerical calculations including time, measurements, quantities
- personal computer operation
- safe and efficient work practices
- methodical organisation of work
- time management.

Other units of competency that could be assessed with this unit

This unit could be assessed on its own or in combination with other competencies relevant to the job function, for example:

- PRMWM30B Determine waste management services
- PRMWM55B Provide quotation
- BSBMGT503A Prepare budgets and financial plans
- BSBSBM404A Undertake business planning.

Resources required to assess this unit

The following resources should be available:

- tender document and requirements
- client file and requirements for review
- service costs
- unit prices of equipment, materials, labour upon which to make estimate
- standard company quotation pro forma
- case studies
- calculator/computer
- relevant codes of practice.

Gaining evidence to assess this unit

For valid and reliable assessment of this unit, the competency should be demonstrated over a period of time and be observed by the assessor (or assessment team working together to conduct the assessment). The competency is to be demonstrated in a range of situations, which may include customer/workplace interruptions and involvement in related activities normally experienced in the workplace.

Evidence of competency is best obtained by observing activities in this field and reviewing the preparation of a detailed tender. If this is not practicable, observations in realistic simulated environments may be substituted.

Consistency in performance

Assessment requires that the plan meets the objectives of the client and that it complies with industry expectations in the particular client environment. If the environment is narrowly defined or is not representative of industry needs, it may be necessary to refer to portfolio case studies of a variety of waste requirements to assess competency in the preparation of a detailed tender.

Oral questioning or written assessment and hypothetical situations (scenarios) may be used to assess underpinning knowledge. (In assessment situations where the candidate is offered a preference between oral questioning and written audit, questions are to be identical.)

Supplementary evidence may be obtained from relevant authenticated correspondence from existing supervisors, team leaders or specialist training staff.

Note: All practical demonstrations must adhere to the safety and environmental regulations relevant to each state or territory.

Key competency levels

There are a number of processes that are learnt throughout work and life that 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.

Information below highlights how these processes are applied in this competency standard.

- | | | |
|------------------------------|---|---|
| 1 Perform the process | 2 Perform and administer the process | 3 Perform, administer and design the process |
|------------------------------|---|---|

How can communication of ideas and information be applied?	3	Document waste management service accounts and tender and organise by record or report for analysis.
How can information be collected, analysed and organised ?	2	Gather and analyse waste management services information and alternative options to possibly present to the client for consideration.
How are activities planned and organised ?	2	Plan and organise activities to monitor and provide feedback throughout the tender process to evaluate effectiveness of tender.
How can teamwork be applied?	2	Work effectively with relevant personnel to meet client requirements within designated timeframes.
How can the use of mathematical ideas and techniques be applied?	3	Correctly apply mathematical techniques to estimate resource requirements and plan and schedule work tasks.
How can problem-solving skills be applied?	2	Analyse factors that may affect meeting client requirements and detail contingencies.
How can the use of technology be applied?	2	Use technology to communicate, schedule, source and document information.

Range Statement

RANGE STATEMENT

The range statement links the required knowledge and organisational and technical requirements to the workplace context. It describes any contextual variables that will be used or encountered when applying the competency in work situations. It allows for different work practices and work and knowledge requirements as well as for differences between organisations and workplaces. The following variables may be present for this particular unit.

Assessment of ability to provide waste management service includes but is not limited to:

- availability of equipment and supplies
- financial considerations
- number of personnel
- other projects
- skills required for provision of service
- tender criteria and conditions
- time constraints.

Client/company includes all forms of business enterprises in this context including government agencies, local governments/councils, private and public companies, and residents/ratepayers

Contingencies typically include:

- building progress
- cash flow
- competencies
- disputes
- insurance
- restricted site access
- time penalties
- transport
- weather and environmental conditions.

Organisational/company requirements are found in:

- access and equity policy, principles and practice
- business and performance plans
- client and company confidentiality requirements
- client service standards
- defined resource parameters
- duty of care, code of conduct, code of ethics
- emergency and evacuation procedures
- induction documentation
- insurance policy agreements
- legal and organisational policy and procedures including personnel practices and guidelines
- OHS policies, procedures and programs
- operations manuals
- organisational goals, objectives, plans, systems and processes
- policies and procedures relating to own role, responsibility and delegation
- quality and continuous improvement processes and standards
- records and information systems and processes
- training materials
- verbal or written instructions.

Organisation's rate schedules include labour rates, standard disposal costs, standard equipment costs, standard materials costs, standard service costs and standard unit costs.

Performance of this unit is carried out in accordance with relevant requirements of the following:

- Australian Standards
- environmental regulations
- legislative requirements
- manufacturers' specifications
- organisational procedures
- relevant state/territory regulations.

Submission requirements include:

- client requirements

- drawings
- format and layout
- legal compliance
- photographs
- response to all tender clauses
- submission date
- tender conditions and criteria.

Tendering criteria and conditions typically include:

- eligibility for submission of tender
- interview
- listing of client requirements
- meeting or presentation of tender
- special requirements
- submission date
- tender document format.

Viability includes consideration of:

- competition in tendering process
- cost of tender preparation
- likely profit
- prospect of winning the tender
- time constraints.
-

Unit Sector(s)

Not Applicable