



Australian Government

Department of Education, Employment and Workplace Relations

PSPPROC412A Develop and distribute requests for offers

Revision Number: 3

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Modification History

Release	TP Version	Comments
3	PSP12V1	Layout adjusted. No changes to content.
2	PSP04V4.2.	Layout adjusted. No changes to content.
1	PSP04V4.1	Primary release.

Unit Descriptor

This unit covers the competencies required to develop and disseminate a request for offers to fulfil procurement requirements. It includes specifying the requirement, developing the formal request for offer documents and developing the offer evaluation plan.

In practice, developing and distributing requests for offers overlaps with other generalist and specialist public sector and local government work activities, such as upholding and supporting the values and principles of public service, identifying and treating risks, exercising delegations, applying government processes, encouraging compliance with legislation in the public sector or local government, planning procurement, selecting providers and managing contracts.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

The unit applies to those who plan, prepare and develop formal requests for offers, including those who specialise in procurement.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

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

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Specify procurement requirement.	1.1. Scoping of requirement is undertaken to identify outcomes, objectives and <i>practical requirements</i> . 1.2. Statement of requirement is prepared that meets organisational requirements for format and content and is acceptable to <i>stakeholders</i> . 1.3. Needs of clients, end users and other stakeholders are considered and incorporated into statement of requirement. 1.4. Procurement outcome is fair to, and achievable by, potential providers. 1.5. Planned provider contract arrangements are specified according to policy and guidelines. 1.6. <i>Standards of performance</i> and <i>codes of practice</i> , incentives, disincentives and performance measures are specified.
2. Develop request for offers.	2.1. <i>Request for offers</i> and contractual conditions suitable for procurement activity are developed and clarified with clients, providers and/or experts as necessary. 2.2. Contractual conditions suitable for procurement activity are developed and clarified with clients, providers and/or experts as necessary. 2.3. When possible and appropriate, <i>input</i> on content of request for offer documents and proposed contractual conditions is obtained from market according to probity requirement of impartiality. 2.4. Approvals to approach marketplace are obtained according to organisational policy and procedures. 2.5. Records relating to documenting request, and seeking, processing and closing <i>offers</i> , are maintained according to organisational procedures and legal requirements.
3. Develop offer evaluation plan.	3.1. <i>Offer evaluation plan</i> , including <i>criteria for evaluation</i> , is developed, documented and approved prior to releasing formal request documentation to the market. 3.2. Where used, <i>specialist expertise</i> is arranged to evaluate offers and the structure and membership of evaluation panel. 3.3. Offer evaluation plan complies with <i>probity requirements</i> , in particular impartiality and management of conflict of interest.
4. Manage distribution	4.1. Request for offers is disseminated according to

and receipt of offers.

- organisational procedures and guidelines, and public sector standards.
- 4.2. Briefings and clarification of information in the request for offer are undertaken as required according to procurement plan, organisational procedures and guidelines, public sector standards and probity requirements of fairness and impartiality.
 - 4.3. ***Offers are received*** according to organisational procedures and guidelines, and public sector standards.
 - 4.4. Requests for offers and closing offers are disseminated in line with ***probity issues***.
 - 4.5. Late offers and non-conforming bids are dealt with according to procurement plan and request for offer documentation.

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
 - consult with stakeholders, specialists and providers involving complex oral and written exchanges of information
 - read complex documents, such as contracts, legislation and guidelines
 - write requests for offers, which may include complex style and language expressed in unambiguous terms
 - provide feedback
- teamwork skills to:
 - work independently or under direction as appropriate to the situation
 - model team leadership approaches if appropriate
 - respond to diversity
 - refer issues to the correct person
- problem-solving skills to:
 - apply probity requirements in specifying and developing requests for offers, providing briefings and information, and receiving offers
 - apply OHS requirements (where safety or security may be an issue) when developing requests for offers
- initiative and enterprise skills to:
 - apply the content of complex documents, such as contracts, legislation and guidelines
 - apply OHS, environmental, sustainability and corporate social responsibility practices in the context of developing requests for offers
- planning and organising skills to manage the release of documents to stakeholders
- learning skills to keep up-to-date with relevant procurement legislation, policies and procedures
- technology skills to:
 - operate organisational IT systems
 - use electronic procurement templates

Required knowledge

- commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
 - relating to requests for offers, including environmental purchasing and corporate social responsibility guidance
 - such as OHS and equity and diversity
- organisational procurement policies, practices and approval processes

- probity principles and issues
- codes of conduct, codes of practice and standards of individual behaviour relating to developing and receiving requests for offers
- issues to be considered when developing requests for offers, including things like buying locally, and open or restricted opportunities to tender
- aspects of law of contract, laws of tort, trade practices law, commercial law and other legislation relating to requests for offers

Evidence Guide

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

Overview of assessment Competency must be demonstrated in the development and distribution of requests for offers; performed consistently and in accordance with legislative and organisational requirements.

Critical aspects for assessment and evidence required to demonstrate competency in this unit Assessment must confirm the ability to:

- consult with stakeholders to develop a specification suited to the particular procurement being completed
- develop request for offer documentation, using templates where available
- develop offer evaluation plans with suitable evaluation criteria and evaluation process, using templates where available
- manage the release of requests for offers to industry
- manage the receipt of responses from industry
- apply probity principles relevant to this stage of the procurement process

Consistency in performance

Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.

Context of and specific resources for assessment The unit of competency is to be assessed in the workplace or a simulated workplace environment. Access may be required to:

- legislation, policy, procedures and protocols relating to procurement of goods and services
- codes of conduct and codes of practice
- workplace scenarios and case studies relating to a range of procurement activities associated with developing and distributing requests for offers
- case studies that incorporate dilemmas, and probity requirements relating to developing and distributing requests for offers

Method of assessment The following assessment methods are suggested:

- questions to assess understanding of relevant legislation and procedures
- review of strategies and approaches adopted for developing

and distributing requests for offers

- review of requests for offers (including specifications), offer evaluation plans, industry briefs, risk assessments and other documentation prepared by the candidate in a range of contexts
- review of stakeholder engagement strategies used by the candidate.

In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.

Guidance information for assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- PSPETHC401A Uphold and support the values and principles of public service
- PSPGOV417A Identify and treat risks
- PSPGOV421A Exercise delegations
- PSPLEGN401A Encourage compliance with legislation in the public sector
- PSPPROC411A Plan procurement
- PSPPROC413A Select providers and develop contracts
- PSPPROC414A Manage contracts.

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, if used in the performance criteria, is detailed below. 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) may also be included.

Practical requirements may include:

- phases or stages of the procurement activity
- timeframes
- expertise needed
- facilities needed
- software and other tools needed

Stakeholders may include:

- end users, customers or clients, and sponsors
- current or potential providers or suppliers
- technical or functional experts or advisers
- commonwealth, state or territory, and local government
- the organisation
- other public sector organisations
- employees, unions and staff associations
- industry bodies
- local communities
- lobby groups and special user groups

Standards of performance and codes of practice may include:

- value for money
- quality measures
- benchmarks
- milestones and timeframes
- performance indicators
- codes of practice and standards of behaviour

Requests for offers may include invitations to submit:

- tenders
- proposals
- quotations
- expressions of interest

Input may be obtained through:

- exposure of draft request for offer
- request for information
- industry comment process

Offers may include:

- tenders
- written quotations
- proposals

- expressions of interest

Offer evaluation plan should:

- be consistent with public sector and organisational legislation, policy and guidelines, such as:
 - commonwealth or state and territory legislation, including:
 - equal employment opportunity and anti-discrimination
 - risk management
 - security and confidentiality
 - council rules and by-laws
 - commonwealth, and state or territory government procurement guidelines, including environmental purchasing, access and equity, social justice guidelines
 - organisational policies and practices
 - environmental, sustainability and corporate social responsibility principles
- include practical and measurable criteria for selecting the provider and explanation of process that will be used to make selection

Criteria for evaluation may include:

- value for money
- demonstrated capacity to deliver outcomes
- available expertise
- project management expertise to deliver the outcomes on time and within budget
- meeting specific policy requirements, such as buying locally and environmental sustainability
- innovation

Specialist expertise may include:

- financial
- legal
- technical and user representatives
- commercial
- probity
- logistics

Probity requirements:

- may include:
 - accountability
 - transparency
 - confidentiality
 - managing conflict of interest
 - impartiality
- are maintained to:
 - ensure conformity to processes

- facilitate accountability
- ensure proponents are treated in a fair and equitable manner
- encourage commercial completion
- preserve public and private sector confidence in government processes

Offers are received:

- using a variety of forms, including:
 - traditional paper-based tender responses
 - computer disk
 - electronic, such as internet, email, facsimile, and electronic tendering system
- by a variety of delivery methods, including:
 - post
 - courier
 - by hand
 - electronic lodgement

Probity issues may include:

- equity of access to tender documents
- fairness in provision of information
- decisions about when to accept or reject late tenders
- inappropriate assistance to prepare a tender
- conflict of interest.

Unit Sector(s)

Not applicable.

Competency field

Procurement and Contract Management.