



**Australian Government**

# **SITXADM501 Prepare and present proposals**

**Release 1**

# SITXADM501 Prepare and present proposals

## Modification History

The version details of this endorsed unit of competency set are in the table below. The latest information is at the top.

Version	Comments
1.0	New unit.

## Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to prepare and present tenders, proposals or bids either as a response to a tender brief or as a proposal created and offered. It requires the ability to analyse client tender specifications or needs, determine organisational ability to meet those requirements and to prepare and present information that is relevant to client criteria or needs.

## Application of the Unit

This unit applies to all tourism, travel, hospitality and event sectors and the tender proposals or bid may be for a one-off event, a series of events or for an extended contract to deliver products and services.

It applies to senior personnel who operate independently or with limited guidance from others and who are responsible for making a range of financial and operational decisions.

## Licensing/Regulatory Information

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

## Pre-Requisites

Not applicable.

## Employability Skills Information

This unit contains employability skills.

## Elements and Performance Criteria Pre-Content

### Elements and Performance Criteria

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 required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

- |   |  |
|---|--|
| 1. Analyse tender requirements.                   | 1.1 Analyse client <b><i>tender brief, product specifications</i></b> or needs.<br>1.2 Seek clarification of product and service requirements from the organisation requesting or requiring the tender.<br>1.3 Determine a plan of action to submit a proposal.  |
| 2. Determine ability to meet tender requirements. | 2.1 Complete an <b><i>assessment</i></b> of organisational capacity to provide products and services.<br>2.2 Determine the <b><i>viability</i></b> of submitting a proposal or bid.<br>2.3 Seek assistance from <b><i>others</i></b> to prepare the proposal or bid and coordinate group input.  |
| 3. Develop details for inclusion in proposal.     | 3.1 Prepare a budget for the provision of products and services.<br>3.2 Develop a quotation for the products or services to be provided.<br>3.3 Consider competitor pricing structure and make reasonable cost adjustments to ensure a price competitive quote.<br>3.4 Collect and collate <b><i>operational information</i></b> for analysis and inclusion in the proposal.<br>3.5 Develop specifications for products and services to be provided.<br>3.6 Access and prepare <b><i>supporting information</i></b> for inclusion in the proposal or bid.<br>3.7 Seek support for the proposal or bid from <b><i>relevant individuals and agencies</i></b> . |
| 4. Prepare written proposal.                      | 4.1 Use clear and concise language according to organisational style for proposals.<br>4.2 Present information relevant to client criteria or needs clearly and comprehensively.<br>4.3 Use a writing style that promotes a quality view of the organisation.<br>4.4 Incorporate all supporting information.<br>4.5 Present materials according to organisational style preferences and in a format that maximises use of creative and promotional techniques.<br>4.6 Evaluate the finished proposal and make adjustments.   |

- 4.7 Maintain copies of all tender documents according to organisational procedures.
- 5. Submit the proposal and seek feedback.
  - 5.1 Lodge all materials at the designated location and within designated deadlines.
  - 5.2 Provide ***additional information*** as requested.
  - 5.3 See feedback on tender outcomes to inform future proposals.

## Required Skills and Knowledge

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

### Required skills

- communication skills to liaise with colleagues, external specialists and the client organisation to collect information for the proposal
- critical thinking skills to analyse the organisational capacity to provide products and services subject to the tender
- initiative and enterprise skills to:
  - select and include a range of useful supporting information with the proposal
  - seek feedback on the tender outcome to assist future work
- literacy skills to:
  - read and interpret client product and service specifications which deal with complex ideas and concepts
  - research operational issues for synthesis within the proposal
  - write comprehensive and creative proposals which promote the organisation
- numeracy skills to interpret and analyse financial information and use complex calculations to develop budgets and quotations
- planning and organising skills to access and sort all information required for tender preparation and to write and submit proposals within designated deadlines
- problem-solving skills to:
  - identify times when assistance is required from colleagues and external specialists
  - identify deficiencies in the proposal and make adjustments
- self-management skills to take responsibility for tender development
- teamwork skills to invite and coordinate the input of others in the organisation
- technology skills to use computers, word processing, presentation and accounting software packages.

### Required knowledge

- for the specific industry sector:
  - role and nature of tender, proposal or bid processes
  - sources of specialist advice and expertise for the development of proposals and bid materials
  - a range of formats for and inclusions of tenders proposals or bids
  - presentation techniques for proposal and bid materials, including current technology options
- for the specific organisation:
  - full details of organisational products, services and facilities
  - operational requirements and production logistics for delivering the products and services subject to tender, proposal or bid
  - sources of costs for products, services and fees

- sources of organisational information to be included in tender proposals
- standards of presentation and contents of style guides
- methods to manage intellectual property of product and service concepts
- features and functions of presentation software packages used to prepare professional and comprehensive tender information.

## 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

#### Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the ability to:

- prepare multiple proposals in response to diverse tender specifications or client needs
- effectively analyse client tender specifications or needs and clearly and comprehensively present information that is relevant to client criteria or needs
- present professional and creative proposals which promote the organisation
- integrate knowledge of organisational products, services and facilities and operational logistics for delivering the products and services subject to tender
- complete proposals within commercial time constraints and nominated deadlines.

#### Context of and specific resources for assessment

Assessment must ensure use of:

- a real or simulated tourism, hospitality or event industry business operation or activity for which tender, proposals or bids are prepared
- computers, printers and software programs currently used by the tourism, hospitality and event industry to prepare proposals
- tender briefs and specifications for tourism, hospitality or event products and services
- financial and operational data used to prepare tenders for tourism, hospitality and event products and services.

#### Method of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- evaluation of a complete tender proposal, prepared by the individual, for the provision of products
- evaluation of reports produced by the individual detailing the processes undertaken to prepare a proposal
- activities that allow assessment of the individual's ability to:
  - analyse the content of different tender brief, product specifications or client needs
  - prepare budgets and quotations for the provision of

different products and services

- write proposals that present information relevant to client criteria or needs
- direct observation of the individual delivering a presentation of a tender, proposal or bid
- written or oral questioning to assess knowledge of the role and nature of tender, proposal or bid processes; details of organisational products, services and facilities, and a range of formats for and inclusions of tender proposals
- review of portfolios of evidence and third-party workplace reports of on-the-job performance by the individual.

### **Guidance information for assessment**

The assessor should design integrated assessment activities to holistically assess this unit with other units relevant to the industry sector, workplace and job role, for example:

- SITHKOP404 Plan catering for events or functions
- SITXEVT401 Plan in-house events or functions
- SITXEVT602 Develop event concepts
- SITXFIN501 Prepare and monitor budgets
- SITXMGT501 Establish and conduct business relationships.



## 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.

*Tender brief* may detail:

- criteria
- details of selection process:
  - interview
  - meeting
  - paper based submission
  - presentation to selection committee
- eligibility for submission of a tender
- formatting requirements for the tender:
  - on-line application
  - use of a template
- lodgement address
- lodgement date
- questions to be answered
- tender specifications.

*Product specifications* may include:

- commencement date for:
  - one off event
  - ongoing provision of products and services
  - series of events
- customers or audience for products and services
- identification of deliverables
- indicative cost of supply
- insurance requirements
- legal requirements
- legal responsibilities of the contractor
- legal responsibilities of the principal
- length of contract
- operational and financial management requirements
- outline of contractual arrangements
- performance standards
- products and services required
- project management
- quality assurance
- requirement for management of:
  - environment

- risk
  - resource requirements; human and physical
  - specified price or maximum price
  - style of products and services
  - timeline for the operation of a particular project.
  - budgetary constraints outlined in the tender brief
  - compliance with regulations
  - diversification from range of products and services currently offered
  - geographic constraints
  - likely profit
  - other conflicting projects
  - resource capacity of organisation to provide scope of products and services
  - risk assessment of providing the products and services.
  - ability to meet the lodgement deadline
  - ability to meet the tender criteria and provide full information required
  - competition and prospect of winning the tender
  - cost of preparing the tender.
- Assessment** of organisational capacity may include:
- Viability** may involve:
- Others** may include:
- artists
  - financial specialists
  - graphic designers
  - industry association personnel
  - joint venture partners
  - legal representatives
  - managers
  - multimedia specialists
  - outsourced consultants
  - peers
  - photographers
  - professional writers
  - supervisors.
- Operational information** may include:
- capacity of facilities to produce products
  - facilities management requirements
  - environmental sustainability policies and procedures
  - event management services
  - event specifications:
    - business program
    - entertainment
    - general concepts and themes
    - social program

- staging, theming and styling
- travel and touring arrangements
- event technical equipment, specifications and services:
  - audio-visual
  - pyrotechnics
  - rigging
  - sound and lighting
  - special effects
  - stage design and construction
  - venue styling
- policies, procedures and practices to manage:
  - crowds
  - environmental impacts
  - impacts on local community
  - risk to tourism, hospitality or event participants
  - work health and safety
- product specifications:
  - accommodation
  - coach, car, aircraft, river and sea vessel details
  - guiding services
  - meal plans
  - menus
  - style of service, theme and decor
  - touring equipment details
  - touring itineraries
- resources that will be utilised:
  - physical
  - human
- suppliers, supply and cost specifications
- special, new or hired equipment required to produce products or provide services
- stock control
- transport.
- awards won by the organisation
- copies of:
  - business registration
  - industry accreditations
  - insurance policies
  - licences
  - membership of organisations

*Supporting information* may include:

- qualifications
- details of current client base
- organisational and individual employee profiles
- photographs of current or previous products and services
- plans, drawings, job specifications
- product and service manuals
- references and details of other successful undertakings
- sample promotional materials
- samples of work
- structure of organisation
- testimonials.
- community agencies
- government agencies
- high profile
- local businesses
- sponsors
- statutory authorities.
- by:
  - face-face conversation
  - formal meeting
  - telephone
- in:
  - a presentation
  - writing.

***Relevant individuals and agencies*** may include:

***Additional information*** may be provided:

## **Unit Sector(s)**

Cross-Sector

## **Competency Field**

Administration