



Australian Government

Department of Education, Employment and Workplace Relations

AHCBUS504A Prepare estimates, quotes and tenders

Release: 1

AHCBUS504A Prepare estimates, quotes and tenders

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit covers the processes involved with preparation of estimates, quote and tenders and defines the standard required to: research the details of the quoted service and clarify with the client; identify requirements for estimate, quote or tender including format, specifications and deadline for submission; identify and cost the resources and services required to fulfil the tender and check for availability; investigate options for supplies, services, contractors and consultants with current pricing structures and availability; develop a work schedule with timelines and expenditure; consider potential problems and risks and develop contingency plans; develop detailed costing sheets with the final quoted cost, including an estimated margin for risk; submit the completed tender to the client with supporting information including details of organisations previous work and client feedback; seek feedback from the client to ensure information supplied is sufficient.
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Application of the Unit

Application of the unit	This unit applies to those who prepare estimates, quotes and tenders in a horticultural, agricultural or land management enterprise.
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Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.
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Elements and Performance Criteria Pre-Content

Not Applicable

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA

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

ELEMENT	PERFORMANCE CRITERIA
	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.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- research and evaluate information
- comply with legislative requirements
- use literacy skills to fulfil job roles as required by the organisation. The level of skill may range from reading and understanding documentation to completion of written reports
- use oral communication skills/language competence to fulfil the job role as specified by the organisation including questioning, active listening, asking for clarification, negotiating solutions and responding to a range of views
- use numeracy skills to estimate, calculate and record complex workplace measures
- use interpersonal skills to work with others and relate to people from a range of cultural, social and religious backgrounds and with a range of physical and mental abilities.

Required knowledge

- 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.

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, 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

The evidence required to demonstrate competency in this unit must be relevant to workplace operations and satisfy holistically all of the requirements of the performance criteria and required skills and knowledge and include achievement of the following:

- research the details of the quoted service and clarify with the client
- identify requirements for estimate, quote or tender including format, specifications and deadline for submission
- identify and cost the resources and services required to fulfil the tender and check for availability
- investigate options for supplies, services, contractors and consultants with current pricing structures and availability
- develop a work schedule with timelines and expenditure
- consider potential problems and risks and develop contingency plans
- develop detailed costing sheets with the final quoted cost, including an estimated margin for risk
- submit the completed tender to the client with supporting information including details of organisations previous work and client feedback
- seek feedback from the client to ensure information supplied is sufficient.

Context of and specific resources for assessment

Competency requires the application of work practices under work conditions. Selection and use of resources for some worksites may differ due to the regional or enterprise circumstances.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole.

The subject of the estimate, quote or tender may include:

- works relating to agricultural production
- horticultural production
- amenity horticulture projects
- conservation and land management-related projects.

Unit Sector(s)

Unit sector	Business
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Co-requisite units

Co-requisite units		

Competency field

Competency field	
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