



Australian Government

Department of Education, Employment and Workplace Relations

CPCCB6008A Develop and implement an appropriate estimating and tendering system

Release: 1

CPCCB6008A Develop and implement an appropriate estimating and tendering system

Modification History

Not Applicable

Unit Descriptor

Unit descriptor

This unit of competency specifies the outcomes required to develop and implement an appropriate estimating and tendering system. It covers the facilitation, implementation and maintenance of an estimating and tendering system in a building and construction organisation involved in residential and/or commercial projects. It supports the establishment of the human resources and facilities necessary to produce accurate and successful tenders in accordance with contractual guidelines.

Application of the Unit

Application of the unit

This unit of competency supports the needs of builders and senior managers within building, construction and services firms, typically working in larger organisations and managing more complex projects and processes, responsible for developing and implementing estimating and tendering systems for residential or commercial projects.

Knowledge of financial and business administration principles, and factors that determine the risks inherent in the organisation's range of construction types, is required. Ability to identify and interpret strategic information which could affect the organisation's financial viability and direct personnel effectively is essential.

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Prerequisite units Nil

Employability Skills Information

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

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Quantify and qualify factors to be included in the organisational tendering system.	1.1. Strategic economic and social factors impacting on the organisation are quantified and qualified. 1.2. Range and scope of activities to be undertaken by the organisation and their impact are strategically quantified and qualified. 1.3. Strategic operational and financial structures within the organisation are reviewed and qualified regarding their information needs.
2. Establish and implement tendering system in the organisation.	2.1. Design and development of the organisational estimating and tendering system are facilitated and implemented in accordance with legislative and organisational requirements. 2.2. Strategic criteria for personnel and processes concerned with estimating and tendering are established and disseminated. 2.3. Endorsement of senior management for implementation of the system is obtained. 2.4. Staff with the necessary expertise and industry knowledge to excel at the tasks involved are appointed.
3. Establish and implement a tendering quality control system.	3.1. Appropriate financial structures which underpin the tendering process are identified and applied. 3.2. Review and feedback system using company project records and performance criteria is facilitated and implemented.
4. Develop and implement a client feedback system.	4.1. Communication system to enable effective contact with clients is established and implemented. 4.2. Client feedback system based on price, performance, progress and other strategic factors is planned and strategically implemented.
5. Establish a recording and evaluation system.	5.1. Tender recording system which meets organisational needs for ongoing evaluation of tender performance is designed and implemented. 5.2. Strategic balances and checks which enable the ongoing maintenance of quality of the estimating and tendering system are developed and implemented.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

Required skills for this unit are:

- apply numeracy skills to workplace requirements
- communication skills to:
 - appoint staff
 - enable clear and direct communication, using questioning to identify and confirm requirements, share information, listen and understand
 - obtain senior management endorsement
 - read and interpret documents from a variety of sources
 - seek feedback
 - use and interpret non-verbal communication
 - use language and concepts appropriate to cultural differences
 - written skills to complete relevant documentation
- conceptualising and envisaging unique solutions to complex problems and situations
- delegating tasks within specific functional guidelines
- directing the activities of personnel involved in the estimating and tendering process
- facilitating the implementation of new and modified systems
- interpreting strategic and often ambiguous information and reaching logical and practical decisions
- monitoring and overseeing the performance of systems and individuals involved in the process
- technological skills to facilitate use of the organisation's software and office equipment.

Required knowledge

Required knowledge for this unit is:

- appropriate sector of the building and construction industry and the nature of the contracts upon which its activities are based
- factors to be considered in assessing the risk inherent in different types of building and construction projects
- financial and business administration principles commensurate with organisational needs
- human resource practices and the industry's industrial relations climate and practices
- relevant state or territory building and construction codes, standards and regulations

REQUIRED SKILLS AND KNOWLEDGE

- socioeconomic and political factors which determine the climate in that sector of the building and construction industry.

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

This unit of competency could be assessed by effective development and implementation of an estimating and tendering system for an organisation.

This unit of competency can be assessed in the workplace or a close simulation of the workplace environment, provided that simulated or project-based assessment techniques fully replicate construction workplace conditions, materials, activities, responsibilities and procedures.

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

A person who demonstrates competency in this unit must be able to provide evidence of the ability to:

- implement an effective estimating and tendering system, supported and directed by strong and decisive leadership
- develop conceptual and strategic problem solving and systems
- implement management practices which result in high level staff productivity
- interact effectively with personnel within and external to the organisation
- communicate effectively both verbally and in writing with senior management, employees, clients and regulatory authorities
- comply with legislative and regulatory requirements and codes of practice.

Context of and specific resources for assessment

This competency is to be assessed using standard and authorised work practices, safety requirements and environmental constraints.

Assessment of essential underpinning knowledge will usually be conducted in an off-site context.

Assessment is to comply with relevant regulatory or Australian standards' requirements.

Resource implications for assessment include:

- suitable project work applicable to the building and construction process

EVIDENCE GUIDE

- appropriate equipment, materials and documentation to comply with OHS legislation and other organisational policies
- related learning resources in support of the underpinning knowledge and skills acquisition required by this unit of competency.

Reasonable adjustments for people with disabilities must be made to assessment processes where required. This could include access to modified equipment and other physical resources, and the provision of appropriate assessment support.

Method of assessment

Assessment methods must:

- satisfy the endorsed Assessment Guidelines of the Construction, Plumbing and Services Training Package
- include direct observation of tasks in real or simulated work conditions, with questioning to confirm the ability to consistently identify and correctly interpret the essential underpinning knowledge required for practical application
- reinforce the integration of employability skills with workplace tasks and job roles
- confirm that competency is verified and able to be transferred to other circumstances and environments.

Validity and sufficiency of evidence requires that:

- competency will need to be demonstrated over a period of time reflecting the scope of the role and the practical requirements of the workplace
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice, with a decision on competency only taken at the point when the assessor has complete confidence in the person's demonstrated ability and applied knowledge
- all assessment that is part of a structured learning experience must include a combination of direct, indirect and

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supplementary evidence.

Assessment processes and techniques should as far as is practical take into account the language, literacy and numeracy capacity of the candidate in relation to the competency being assessed. Supplementary evidence of competency may be obtained from relevant authenticated documentation from third parties, such as existing supervisors, team leaders or specialist training staff.

Range Statement

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.

- Tendering system*** factors include:
- legislative and regulatory requirements and codes of practice
 - market rates, trends and technological improvements and variations
 - materials and labour cost determination
 - range of contracts employed by the organisation
 - standard organisational documentation
 - tendering methods, processes and timeframes
 - timeframes and scheduling arrangements.
- Strategic criteria for personnel and processes concerned with estimating and tendering*** include:
- analysis and revision of data
 - critical incident analysis and reporting
 - risk management
 - scheduling and planning for contingencies.
- Financial structures which underpin the tendering process*** include:
- accounting methods and systems
 - calculation and apportioning of overheads and margins
 - subcontracting and organisational contracting rates.

RANGE STATEMENT

Review and feedback system
includes:

- critical path development and analysis
- feedback loops
- internal and external client review and feedback systems
- personnel and system review and evaluation processes
- programmed and critical incident evaluation meetings.

Communication system includes:

- phone, facsimile and email systems
- handwritten and word-processed reports and briefing notes
- internal and external memoranda
- face to face communication.

Tender recording system includes:

- day logs and diaries
- financial, labour and materials recording and inventory systems
- manual and computer-based data systems.

Unit Sector(s)

Unit sector Construction

Co-requisite units

Co-requisite units Nil

Functional area

Functional area