



Australian Government

Department of Education, Employment and Workplace Relations

LGACOM409A Prepare tender documentation

Release 2

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Modification History

LGACOM409A Release 2: Layout adjusted. No changes to content.
LGACOM409A Release 1: Primary release.

Unit Descriptor

This unit covers the scoping of contract services, the preparation of tender documentation and the calling for tenders.

Application of the Unit

This unit supports the attainment of skills and knowledge required for competent workplace performance in councils of all sizes. Knowledge of the legislation and regulations within which councils must operate is essential. The unique nature of councils, as a tier of government directed by elected members and reflecting the needs of local communities, must be appropriately reflected.

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 required 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. Identify the extent and nature of services to be contracted	1.1. Scope of the services is confirmed and reviewed to ensure parameters meet current requirements. 1.2. Statutory and council requirements are identified to determine available options. 1.3. Detailed parameters are specified to enable a complete brief to be prepared. 1.4. The extent of the contract package is determined.
2. Select appropriate method for tender	2.1. Area to be contracted is examined. 2.2. Contract options are identified and analysed. 2.3. Benefits, costs and opportunities of each option are identified. 2.4. Appropriate contract option is selected.
3. Prepare tender specifications according to council and Australian standards	3.1. Complete and detailed service specifications are prepared consistent with council policy and Australian standards and based on service profile and review. 3.2. Legislative, environmental, sustainability practices, occupational health and safety and risk management requirements are applied. 3.3. Quality assurance methods are applied to the preparation of service specifications. 3.4. Service specifications are prepared in consultation with relevant staff that complement required outcomes. 3.5. Details on methods, standards, materials, products, contractors and performance period are provided by quality service specifications, as applicable.
4. Prepare evaluation criteria	4.1. A tender review panel or team is selected from appropriate personnel. 4.2. Criteria are established based on the specifications, product and service required. 4.3. Criteria are written clearly to enable bids to be compared. 4.4. Criteria are ranked against council procedures.
5. Prepare tender document	5.1. Tender documents are prepared clearly and concisely. 5.2. Tender documents are prepared that enable competitive pricing of products. 5.3. Tender documents are designed to enable valid comparisons between tenders received.
6. Invite tenders	6.1. Invitations are prepared based on the type of tendering method used. 6.2. Source list is prepared according to council procedures. 6.3. Advertisement is prepared and placed according to the tender method.

Required Skills and Knowledge

This describes the essential skills and knowledge and their level, required for this unit

Required Skills

- report and specification writing
- qualitative and quantitative research
- analytical
- consultation with relevant personnel
- specification interpretation
- negotiation with relevant internal and external people
- observation of protocol and probity policies

Required Knowledge

- relevant council policies, procedures and codes of conduct
- sustainability practices
- quality assurance systems
- relevant Australian and industry standards
- statutory and council tender requirements
- contractual processes
- industrial agreements
- statutory council requirements
- tendering codes of practice
- national competition policy

Evidence Guide

Overview of assessment requirements	A person who demonstrates competency in this unit will be able to perform the outcomes described in the Elements to the required performance level detailed in the Performance Criteria. The knowledge and skill requirements described in the Range Statement must also be demonstrated. For example, knowledge of the legislative framework and safe work practices that underpin the performance of the unit are also required to be demonstrated.
Critical aspects of evidence to be considered	• Contract authorisation process is undertaken • Appropriate advertisement is placed • Required specifications are produced • Conditions of contract are produced • Industry standard conditions of contract are applied • Confidentiality and probity are observed for both in-house bids and/or external tenders
Context of assessment	On the job or in a simulated work environment.
Method of assessment	The following assessment methods are suggested: • observation of the learner performing a range of workplace tasks over sufficient time to demonstrate handling of a range of contingencies • written and/or oral questioning to assess knowledge and understanding • completion of workplace documentation • third-party reports from experienced practitioners • completion of self-paced learning materials including personal reflection and feedback from trainer, coach or supervisor
Evidence required for demonstration of consistent performance	Evidence will need to be gathered over time across a range of variables.
Resource implications	Access to a workplace or simulated case study that provides the following resources: • relevant council policies and procedures • national competition policy information

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 in the Performance Criteria is detailed below.

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| <i>Services</i> may include: | <ul style="list-style-type: none">• works• function• provision• community expectations |
| <i>Parameters</i> may include: | <ul style="list-style-type: none">• budget range• council resources• level of risk• council policies, such as 'buy local' |
| <i>Tendering methodology</i> may include: | <ul style="list-style-type: none">• lump sum• unit rate• partnership• services process |
| <i>Tendering method</i> may include: | <ul style="list-style-type: none">• expression of interest• public tender• invitation• verbal• written• in-house bid• select tender |
| <i>Advertisement</i> may include: | <ul style="list-style-type: none">• newspaper• in-house• trade magazines• according to council policy |
| <i>Legislative requirements</i> may include: | <ul style="list-style-type: none">• WorkCover• risk management• occupational health and safety• sustainability• equal employment opportunity• sexual harassment• public liability• professional indemnity• evidence of insurance cover• quality assurance |
| <i>Tender documents</i> may include: | <ul style="list-style-type: none">• general conditions• special clauses• technical conditions |

- standard specifications
 - code of tendering
 - statutory declaration
 - evaluation criteria
 - drawings
 - implementation plan
 - legislative amendments
 - legal endorsement
- Comparative statement** may include:
- matrix
 - data
 - criteria
 - compliance
 - score
- Formalisation** may include:
- contract signing procedure
 - preliminary deposits
- Evaluation** may include:
- previous projects
 - verification of quality accreditation
 - capacity
 - capability
 - risk
 - security
 - service

Unit Sector(s)

Administration.

Competency field

Not applicable.