



Australian Government

SITXMPR008 Prepare and present proposals

Release: 1

SITXMPR008 Prepare and present proposals

Modification History

Not applicable.

Application

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.

The unit applies to all tourism, travel, hospitality and event sectors and the tender proposal or bid may be for a one-off occasion, a series of occasions, 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.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Marketing and Public Relations

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes.

1. Analyse tender requirements and organisational capacity to meet them.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1. Analyse tender brief, product specifications and needs.
- 1.2. Seek clarification of product and service requirements from organisation requesting or requiring the tender.
- 1.3. Complete assessment of organisational capacity to provide products and services.

- 1.4.Determine viability and, if progressing to a proposal or bid, a plan of action for submission.
2. Develop details for inclusion in proposal.
 - 2.1.Seek assistance to prepare proposal or bid, and coordinate input.
 - 2.2.Prepare budget for providing products and services.
 - 2.3.Develop quotation for products or services to be provided.
 - 2.4.Consider competitor pricing structure and make reasonable cost adjustments to ensure price-competitive quote.
 - 2.5.Collect and collate operational information for analysis and inclusion in proposal.
 - 2.6.Develop specifications for products and services to be provided.
 - 2.7.Access and prepare supporting information for inclusion in proposal or bid.
 - 2.8.Seek support for proposal or bid from relevant individuals and agencies.
3. Prepare written proposal.
 - 3.1.Present clear and comprehensive information relevant to client tender criteria and needs.
 - 3.2.Incorporate all supporting information.
 - 3.3.Present materials according to organisational style preferences in format that maximises use of strategic and creative techniques, and promotes the organisation.
 - 3.4.Evaluate finished proposal, make any required adjustments, and obtain approval to submit if necessary.
4. Submit proposal and seek feedback.
 - 4.1.Lodge all proposal materials at designated location and within designated deadlines.
 - 4.2.Maintain copies of tender documents according to organisational procedures.
 - 4.3.Provide additional information as requested.
 - 4.4.See feedback on tender outcomes to inform future proposals.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
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|------------------------------------|---|
| Reading skills to: | <ul style="list-style-type: none">• interpret client product and service specifications which deal with complex ideas and concepts• research operational issues for use within the proposal. |
| Writing skills to: | <ul style="list-style-type: none">• develop detailed proposals that respond to client tender needs while at the same time take account of organisational capacity. |
| Numeracy skills to: | <ul style="list-style-type: none">• interpret and analyse financial information and use complex calculations to develop budgets and quotations. |
| Learning skills to: | <ul style="list-style-type: none">• monitor tender outcomes and identify issues that impact on future tenders. |
| Problem-solving skills to: | <ul style="list-style-type: none">• identify deficiencies in proposals and identify viable solutions. |
| Planning and organising skills to: | <ul style="list-style-type: none">• access and sort information required for tender preparation within designated deadlines. |
| Technology skills to: | <ul style="list-style-type: none">• use computers, word processing programs, presentation and accounting software packages and to present information in a compliant format. |

Unit Mapping Information

SITXADM501 Prepare and present proposals

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694>

Assessment Requirements for SITXMPR008 Prepare and present proposals

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- prepare one proposal for a product and one proposal for a service, each of which responds to tender specifications or client needs, and includes:
 - capacity of organisation to produce product or provide service
 - organisation's management structure and services
 - policies, procedures and practices to be managed as part of tender
 - product or service specifications
 - resources that will be used and associated supplier, supply and cost specifications
 - special, technical, new or hired equipment required to produce product or provide service
 - transport requirements and costs
- comply with the following criteria when preparing each of the above proposals:
 - eligibility criteria for submission
 - formatting requirements
 - lodgement specifications
 - tender specifications
 - questions to be answered
- effectively analyse client tender brief, specifications and needs in relation to each of the above proposals and confirm viability before proceeding
- present professional and creative proposals that:
 - promote the organisation
 - meet commercial time constraints.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- specific industry sector:
 - formats for and inclusions of tender proposals or bids
 - presentation techniques for proposal and bid materials and current technology options
 - role and nature of tender, proposal or bid processes

- sources of specialist advice and expertise for developing proposals and bid materials
- 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
- factors that impact organisational capacity to meet a tender:
 - budgetary constraints outlined in the tender brief
 - compliance with regulations
 - diversification from 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
- factors to assess in determining viability to meet tender requirements:
 - ability to meet lodgement deadline
 - ability to meet tender criteria and provide full information required
 - competition and prospect of winning the tender
 - cost of preparing tender
- supporting materials for bids and proposals:
 - awards won by the organisation
 - copies of:
 - business registration
 - industry accreditations
 - insurance policies
 - licences
 - membership of organisations
 - qualifications
 - details of current client base
 - organisational and individual employee profiles
 - photographs of current or previous products and services
 - plans, drawings and job specifications
 - product and service manuals
 - references and details of other successful undertakings
 - sample promotional materials
 - samples of work
 - structure of organisation

- testimonials
- 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.

Assessment Conditions

Skills must be demonstrated in a tourism, hospitality or events environment where tenders, proposals or bids are prepared. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to: computers, printers and software programs currently used to prepare proposals:

- organisational templates:
 - budgets
 - proposals
 - product or service specifications
- tender briefs and specifications for products and services
- financial and operational data used to prepare tenders
- customers seeking services via a tender process and team members from whom to seek input on proposal preparation; these can be:
 - those in an industry workplace who are assisted by the individual during the assessment process; or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

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