



Australian Government

Assessment Requirements for SITXMPR016 Prepare and present proposals

Release: 1

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

Knowledge Evidence

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

- formats for and inclusions of tenders, proposals and bids
- presentation techniques for tender, proposal and bid materials and current technology options
- role and nature of tender, proposal and bid processes

- sources of specialist advice and expertise for developing tender, proposal and bid materials
- organisational information:
 - full details of organisational products, services and facilities
 - operational requirements and production logistics for delivering the products or services subject to tender, proposal or bid
 - sources of costs for products, services and fees
 - sources of supporting material to be included in tenders, proposals or bids
 - standards of presentation and contents of style guides
- factors that impact organisational capacity to meet client specifications:
 - budgetary constraints outlined in the 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 client requirements:
 - ability to meet lodgement deadline
 - ability to meet tender, proposal or bid criteria and provide full information required
 - competition and prospect of being the successful submitting organisation
 - cost of preparing tender, proposal or bid
- supporting materials for tenders, proposals and bids:
 - 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 tenders, proposals and bids.

Assessment Conditions

Skills must be demonstrated in an operational business environment. This can be:

- an industry workplace; or
- a simulated industry environment or activity set up for the purposes of assessment.

Assessment must ensure access to:

- organisational templates
- client briefs and specifications for products or services
- financial and operational data used to prepare tenders, proposals or bids
- customers seeking products or services and team members from whom to seek input on tender, proposal or bid 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

Companion Volume implementation guides are found in VETNet -

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