



Australian Government

SITXMPR016 Prepare and present proposals

Release: 1

SITXMPR016 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 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.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

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 client requirements and organisational capacity

PERFORMANCE CRITERIA

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

- 1.1. Analyse client brief, product specifications and needs.
- 1.2. Seek clarification of product and service requirements from client organisation as required.

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| to meet them. | 1.3. Assess organisational capacity to provide products or services. |
| | 1.4. Determine viability and, if progressing to a tender, proposal or bid, a plan of action for submission. |
| 2. Develop details for inclusion in tender, proposal or bid. | 2.1. Seek assistance to prepare tender, proposal or bid, and coordinate input. |
| | 2.2. Prepare budget for providing products or 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 tender, proposal or bid. |
| | 2.6. Develop specifications for products or services to be provided. |
| | 2.7. Access and prepare supporting information for inclusion in tender, proposal or bid. |
| | 2.8. Seek support for tender, proposal or bid from relevant individuals and agencies. |
| 3. Prepare written tender, proposal or bid. | 3.1 Present clear and comprehensive information relevant to client 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 tender, proposal or bid, make any required adjustments, and obtain approval to submit if necessary. |
| 4. Submit tender, proposal or bid and seek feedback. | 4.1. Lodge all proposal materials at designated location and within designated deadlines. |
| | 4.2. Maintain copies of tender, proposal or bid documents according to organisational procedures. |
| | 4.3. Provide additional information as requested. |
| | 4.4 Seek feedback on tender, proposal or bid outcomes to inform future submissions. |

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 or service specifications• research operational issues for use within the tender, proposal or bid. |
| Learning skills to: | <ul style="list-style-type: none">• monitor tender, proposal or bid outcomes and identify issues that impact on future submissions. |
| Problem-solving skills to: | <ul style="list-style-type: none">• identify deficiencies in tenders, proposals or bids and identify viable solutions. |
| Planning and organising skills to: | <ul style="list-style-type: none">• access and sort information required for tender, proposal or bid preparation within designated deadlines. |
| Technology skills to: | <ul style="list-style-type: none">• use computers, word processing programs, and presentation and accounting software packages to present information in a compliant format. |

Unit Mapping Information

Supersedes and is equivalent to SITXMPR008 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 SITXMPR016 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 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

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