



Australian Government

Department of Education, Employment and Workplace Relations

TAATAS502B Prepare a tender bid

Release: 1

TAATAS502B Prepare a tender bid

Modification History

Not applicable.

Unit Descriptor

This unit specifies the competency required to bid for the provision of goods or services through a tender process.

Application of the Unit

This unit addresses the competency of writing a submission or proposal to supply goods or services required by the purchasing organisation through a tender process. It involves researching, preparing and writing a proposal that outlines the suppliers capabilities to meet the tender specifications.

This competency applies to the supplier in a tendering process. The competency of preparing tender documentation as purchaser and overseeing the tendering process is addressed in the purchasing domain of the Business Services Training Package, in particular through the unit of competency **BSBPUR401A Plan purchasing**. The unit **LGACOM409A Prepare tender documentation** from the Local Government Training Package is also of relevance.

In the training and assessment context the provision of tendered services is a critical area of competency applied to funded and contracted services, projects or product development.

Competency in this unit requires knowledge and skills in interpreting tender specifications; developing appropriate activities and methodologies to meet those specifications; estimating financial, human and physical resources needs; and preparing a detailed submission that demonstrates and markets the capacity and capability of the supplier to achieve the specified tender requirements.

Competency also includes responsibility for formatting and lodging the final submission to the potential client within designated timelines and requires the application of relevant technology and project tools.

A critical outcome of this unit is a demonstrated capacity to translate the tender specifications into a clearly defined methodology which encompasses innovative ideas and to develop a budget as part of the tender submission.

The development of innovative ideas is addressed as a separate unit in **TAAENV404B Develop innovative ideas at work**. Budgetary and financial management competency is covered in **BSBMGT503A Prepare budgets and financial plans**.

The competency of managing a project is addressed in **TAATAS503B Manage contracted work**.

The competency specified in this unit is typically required by trainers/facilitators, teachers, assessors, training product developers, program coordinators, training consultants, training managers and learning development/human resource personnel.

In other industry contexts, this unit is relevant to any person undertaking this area of work.

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 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

Elements and Performance Criteria

Element	Performance Criteria
1 Determine tender requirements	1.1 Tender specifications and/or other relevant documentation are obtained and analysed to establish tender requirements 1.2 Viability to undertake required work is assessed against tender specifications and organisational and/or individual operational capacities and capabilities 1.3 Risk assessment is conducted on anticipated outcomes in accordance with organisational and legal requirements 1.4 All occupational health and safety (OHS) and other relevant legislative requirements are interpreted and allowed for within the parameters of the tender requirements

- 2 Develop tender content
 - 2.1 Options and ideas to address tender requirements are generated using effective thinking skills and knowledge of tender area
 - 2.2 Options and ideas are elaborated and refined, and where feasible, further developed with **relevant persons**
 - 2.3 Specific timelines, stages, activities and deliverables are defined and documented to meet tender requirements
 - 2.4 Physical and human resources required to undertake the specified tender requirements are determined and confirmed with relevant persons, where required, in accordance with organisational requirements
 - 2.5 Financial costings are determined in accordance with organisational requirements, and a proposed budget is prepared, with assistance from **others**, if required
- 3 Prepare tender bid
 - 3.1 **Business technology** is used to present information in a format that markets capabilities
 - 3.2 Specific **tender criteria and conditions** are addressed in writing tender submission/proposal
 - 3.3 Submission/proposal outlines organisational capabilities
 - 3.4 All information is reviewed to ensure accuracy and effectiveness in meeting tender specifications
 - 3.5 Final proposal/submission is proofread, formatted and lodged within designated timelines, and a copy is securely stored in accordance with organisational requirements
 - 3.6 Presentation materials are prepared and presentation made to client to support the bid, where required

Required Skills and Knowledge

Not applicable.

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

To demonstrate competency against this unit candidates must be able to provide evidence of the processes used to develop and prepare a detailed proposal/submission in response to a tender which accurately covers the tender requirements.

This evidence must show how the tender specifications were analysed; assessment of organisational viability and risks associated with tender requirements; a detailed methodology and budget; and a final tender proposal/submission which meets all tender criteria and organisational requirements.

Evidence Requirements

Required knowledge includes:

relevant policy, legislation, codes of practice and national standards including Commonwealth, state/ territory legislation, e.g. that related to:

client privacy and confidentiality

provision of accurate information

environmental standards

equal employment opportunities (EEO) and anti-discrimination

OHS roles and responsibilities of employers and employees, trainers/facilitators and assessors, and of the organisation as a training and/or assessment organisation

industries in which the training and/or assessment organisation operates

types of training and assessment projects

tender layout, format and presentation methods

organisational pricing policy and procedures

contingency and risk assessment techniques

key project success factors and typical project pitfalls

evaluation and revision techniques, such as:
asking specific questions
seeking and analysing feedback

Required skills and attributes include:

literacy and communication skills to:
read and interpret relevant information
comply with tender criteria and conditions
provide clear and precise information
receive and interpret feedback on draft submission

prepare required documentation using clear and comprehensible language and layout
tailor submission to requirements

research and evaluation skills to:
evaluate tender requirements to establish project requirements
evaluate viability to provide services and/or products to undertake the project
determine needs of target client group
conduct a risk assessment on anticipated project outcomes
identify and estimate required resources
evaluate feedback for incorporation in submission
identify selection criteria, weightings and selection process

numeracy skills to:
create a detailed budget
prepare a submission for tender

proofreading and editing skills to:
revise, amend and finalise submission

project planning skills to:
plan and schedule activities

	methodically organise work work within agreed timeframes and budgetary constraints
	technology skills to: use appropriate equipment and software to research and compile information use spreadsheets in the preparation of a detailed budget
Products that could be used as evidence include:	prepared quotations and estimates tender proposal/submission feedback received on tender proposal/submission graphic presentations
Processes that could be used as evidence include:	how tender criteria were analysed how resource requirements were identified and estimated how risks were identified and assessed what costing and quoting methods were used how relevant policies or legislative information were reviewed how feedback on tenders was used to improve future tenders
Resource implications for assessment include:	access to real or simulated tender process access to information to prepare tender (relevant documents, research, organisational information) access to people involved in tender process time specifications
The collection of quality evidence requires that:	assessment must address the scope of this unit and reflect all components of the unit i.e. the Elements, Performance Criteria, Range Statement, Evidence Guide, Employability Skills a range of appropriate assessment methods/evidence gathering techniques is used to determine competency

evidence must be gathered in the workplace wherever possible. Where no workplace is available, a simulated workplace must be provided

the evidence collected must relate to a number of performances assessed at different points in time and in a learning and assessment pathway these must be separated by further learning and practice

assessment meets the rules of evidence

a judgement of competency should only be made when the assessor is confident that the required outcomes of the unit have been achieved and that consistent performance has been demonstrated

Specific evidence requirements must include:

a detailed tender proposal/submission which addresses:

tender specifications

organisational viability

detailed methodology with identified stages, activities, timelines and deliverables

risk assessment

resource requirements

budget

revision, editing and proofreading following feedback

effective presentation

Integrated assessment means that:

this unit can be assessed alone or as part of an integrated assessment activity involving relevant units in the **TAA04 Training and Assessment Training Package**. Suggested units include but are not limited to:

TAATAS501A Undertake organisational training needs analysis

TAATAS503B Manage contracted work

TAAASS403B Develop assessment tools

TAADES502B Design and develop learning resources

TAADES503B Research and design

e-learningresources

**TAADES504B Develop and evaluate
e-learningresources**

**TAADES505B Research and develop
competencystandards.**

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.

Tender specifications may include:

- simple or detailed explanation of tender requirements
- identification of deliverables
- client group needs
- designated performance standards
- proposed activities to be undertaken
- time and cost parameters
- scope
- quality
- human and physical resource needs
- legal requirements
- consultation, stakeholder involvement
- project management
- insurance requirements
- specific requirements

Viability may include consideration of:

- tender criteria and conditions
- available resources, equipment and supplies
- client group needs
- time constraints
- other projects
- geographical constraints
- skills required for the provision of services
- financial considerations
- compliance with regulations

Risk assessment may include:

- identifying risks in isolation or as part of a broader risk management strategy,

addressing risks such as:
environmental landscape
financial/economic loss/failure
damage to property/equipment
professional incompetency
equipment/system failures
OHS
inability to deliver or meet the timelines if selected

Organisational requirements may include: quality assurance and/or procedures manuals
organisational goals, objectives, plans, systems and processes
organisational policies, procedures and guidelines
recording and reporting procedures
industry consultative mechanisms
business and performance plans
access and equity principles and practices
confidentiality requirements
ethical standards
collaborative/partnership arrangements
OHS policies, procedures and programs
quality and continuous improvement processes and standards
defined resource parameters

Legal requirements may include: Australian Quality Training Framework (AQTF) Standards for Registered Training Organisations (RTOs)
state or territory registering body requirements
industrial relations award and enterprise agreements and relevant industrial arrangements
confidentiality and privacy requirements
relevant legislation from all levels of government that affects business operations

	OHS legislation
	environmental legislation
	equal opportunity legislation
	industrial relations legislation
	anti-discrimination legislation
	relevant industry codes of practice
Relevant persons may include:	tenderer/potential client
	target client group
	colleagues
	managers, supervisors
	government agencies
	employment agencies
	industry groups
	training and/or assessment coordinators
	industry regulators/licensing authorities
	members of professional associations
	state/territory registering body
	external consultants
Others may include:	accounting/finance personnel
	other persons with broader budgetary experience
Business technology may include:	computers
	database software applications
	graphical presentation software
	word processing software
	project management software
	printers
	email, Internet, Intranet
Specific tender criteria and conditions may include:	eligibility for submission of tender
	special requirements
	selection criteria and weightings
	tender document format
	interview, meeting or presentation of tender

submission date

Unit Sector(s)

Not applicable.

Competency Field

Training Advisory Services