OCR Level 3 NVQ Certificate in Management – Unit 34

Unit Title:	Manage a tendering process (E16)
OCR Unit Number:	34
Unit Number	H/600/9738
Level:	4
Credit value:	4
Guided learning hours:	20

Unit purpose and aim

This unit will ensure that learners are able to manage a tendering process, including developing product or service specifications and tender guidelines, evaluating tenders and selecting a supplier to deliver the required products or services.

Learning Outcomes	Assessment Criteria	Exemplification
1 Understand tendering processes	1.1 Explain the legal requirements of a tendering process. 1.2 Explain organisational tendering policies and processes. 1.3 Explain how to seek specialist support for the tendering process.	This may include: • The relevant legal and regulatory requirements for tendering in the Public Sector : such as Regulations 2006, Public Contracts (Scotland) 2006 • The organisational tendering policies and procedures such as threshold value of goods and services above which tendering procedures must be followed, minimum number of tenders, authorisation, types of tender, eg open, restricted, negotiated, preparation for tender, invitation to tender, opening tenders, tender evaluation criteria, evaluation and approval of tender, notification to tender, document retention • The specialists who can provide support such as, purchasing department, legal services, financial services

© OCR 2010 Oxford Cambridge and RSA Examinations

Learning Outcomes	Assessment Criteria	Exemplification
		• The policies and procedures, together with any legal or regulatory requirements related to tendering to colleagues so that they can carry out their roles appropriately, calling on support as required.
2 Be able to draw up a specification for required products or services.	2.1 Consult with colleagues to identify and agree requirements for products or services. 2.2 Draw up a specification that describes the products or services required.	This may include: • How to communicate appropriately with colleagues to identify the purpose of the purchase, specific requirements, costs • How to develop a specification which is: - clear and easy to read - describes precisely what is required, what the goods, service, or activity/work is meant to achieve, essential and desirable requirements evaluation criteria to judge if requirements have been met, explains precisely what is required.
3 Be able to write an invitation to tender document and communicate it to prospective suppliers.	3.1 Write an invitation to tender outlining required specifications and organisational tendering processes. 3.2 Communicate the invitation to tender to prospective suppliers.	This may include: • The organisational tendering processes such as expressions of interest and requests to tender, the content of invitations to tender such as: contextualisation, services/work/goods required, timings, deliverables • How to communicate clear and understandable invitations to tender which are consistent with organisational requirements.
4 Understand how to respond fairly to pre-tender queries.	4.1 Explain how to respond to pre-tender queries in ways that ensure all prospective suppliers have the same information.	This may include: • Information arising from pre-tender queries to all potential bidders

© OCR 2010 Oxford Cambridge and RSA Examinations

Learning Outcomes	Assessment Criteria	Exemplification
		• The methods of collating and disseminating the information such as: pre-tender briefing meetings, collating and dissemination of questions and responses to all who have expressed interest.
5 Be able to evaluate received tenders.	5.1 Establish criteria with which to evaluate received tenders. 5.2 Receive, record and open tenders in line with stated tendering process. 5.3 Seek clarification from prospective suppliers where necessary. 5.4 Evaluate tenders against established criteria.	This may include: • The risks which are relevant to particular tenders such as financial strength, capability, conflicts of interest, past record of past dealings with bidder • Evaluation criteria which are fair and transparent such as: quality of bid, experience, after sales service, technical capability • The processes for receiving, recording and opening bids used by the organisation such as open bid, sealed bid • The appropriate processes to ensure that all bids are properly dealt fairly and in line with the process laid out in the tendering process • Organisational policy and procedures in carrying out post tender negotiations • The evaluation criteria and associated weighting to identify whether any of the bids meet the criteria sufficiently to be offered a contract.
6 Be able to select a supplier and provide post-tender feedback.	6.1 Offer a contract to the chosen supplier. 6.2 Inform unsuccessful suppliers of the outcome and provide feedback.	This may include: • How to formulate a contract in line with organisational policy covering areas such: responsibilities and liabilities of both parties, detailed descriptions of the service/work/goods being supplied, deadlines, monitoring criteria, outcomes

Learning Outcomes	Assessment Criteria	Exemplification
		• How to provide unsuccessful suppliers with feedback on the reasons why their bids were not successful such as: failure to address bid requirements, price, experience.

Assessment

This unit is centre assessed and externally verified. In order to achieve the unit you must produce a portfolio of evidence which will need to be made available to the OCR external verifier.

Portfolios of work must be produced independently and Centres must confirm to OCR that the evidence is authentic. Assessment must be based on naturally occurring evidence from the workplace.

Evidence requirements

In order to achieve this unit you must demonstrate that you have met all of the stated learning outcomes and assessment criteria. Your assessor must be able to observe you in the workplace or you must provide tangible evidence of your real work activities. Simulation is not allowed for this unit.

Guidance on assessment and evidence requirements

Candidates are encouraged to use evidence, where appropriate across a number of units to reduce repetition. Where ever possible, the evidence should occur naturally within the role of the individual and can include

Reports and other documentation created for the organisation,

- Tendering documents
- Pre-tender request for information and responses
- Post tender negotiations
- Feedback to unsuccessful bidders.

In addition, evidence can be sought in a number of ways, when it is not available through normal work or where ephemeral evidence such as that of behaviour is required, these methods may include:

- Witness testimonies from colleagues, managers and subordinates
- observations of tasks and interactions with others
- case studies where the candidate explains and reflects upon specific events which demonstrate competence, where current evidence is not available.
- Professional discussions where the candidate explains the rationale for a particular approach to the assessor.

© OCR 2010 Oxford Cambridge and RSA Examinations

This is a level four unit and thus the candidate must demonstrate complex skills and knowledge, often covering more than one element of the assessment criteria. The ability to recognise and develop competence across these criteria is to be encouraged but it does mean that reports, whilst aiming for succinctness and clarity of thought will need to be of sufficient depth and breadth to meet the level four standard. Minutes of meetings must demonstrate that the candidate's contribution is significant and contributes to the meeting of assessment criteria and be easily identifiable within the document.

Digital evidence such as recordings of meetings, photographs, scanned documents are also permitted.

Resources

Stationery, USB drive or a CD-rom.

Access to photocopier, PC and printer is desirable but not essential.

Access to sources of under-pinning knowledge such as websites, books, journals, etc, might be of help, but you are not expected to reproduce other people's written work.

- GOLD, J. THORPE, R. and MUMFORD, A. (April, 2010) *Leadership and Management Development.* ISBN: 1843982447
- http://www.dalecarnegie.com/kc/
- http://www.What-are-good-leadershipskills.com (2010)
- MacBeath, J. (ed) (2008) Connecting Leadership and Learning: Principles for Practice
- **Northouse G., (2009) Leadership: Theory and Practice [Paperback]**
- http://www.businesslink.gov.uk
- http://www.smallbusiness.co.uk
- Johnson, C. and Keddy, J (2010) *Managing Conflict at Work: Understanding and Resolving Conflict for Productive Working Relationships* **ISBN-10:** 0749459522
- Eckerson, W (2010) *Performance Dashboards: Measuring, Monitoring, and Managing Your Business, 2nd Ed* **ISBN-10:** 0470589833
- www.hse.gov.uk/legislation/index.htm

Details of relationship between the unit and national occupational standards

This unit is based on the NOS produced by the Management Standards Centre (MSC)

Management and Leadership NOS unit E16, Select suppliers through a tendering process.

NOS can be viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk.

Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications' (A850)* on the OCR website www.ocr.org.uk

OCR
Oxford Cambridge and RSA

OCR Level 3 NVQ Certificate in Management

Evidence Record Sheet

Unit 34 Manage a tendering process (E16)

I confirm that the evidence provided is a result of my own work.

Signature of candidate: _____ Date: _____

Evidence reference	Evidence title	Assessment method	LO1			LO2		LO3		LO4	LO5				LO6	
			1.1	1.2	1.3	2.1	2.2	3.1	3.2	4.1	5.1	5.2	5.3	5.4	6.1	6.2

I confirm that the candidate has demonstrated competence by satisfying all of the criteria for this unit.

Signature of assessor: _____ Name (in block capitals): _____ Date: _____

Countersignature of qualified assessor (if required) and date: _____

IV initials (if sampled) and date: _____ Countersignature of qualified IV (if required) and date: _____

(Page of)

© OCR 2010 Oxford Cambridge and RSA Examinations