

SUMETPM205

Develop estimates and tenders for electrotechnical projects



Overview

This unit is for you if you are responsible for developing estimates and tenders.

This unit is about ensuring that accurate information is obtained in order to develop and submit estimates and the completed tender. It involves considering quantities of materials, plant and labour that will be required. It involves approaching potential external providers of materials, plant and labour and asking them to submit costs for the same if necessary. It is also about considering potential problems that could occur in relation to the delivery of materials, plant and labour. It also involves storing and recording relevant information and ensuring that adequate administrative procedures are in place for each stage in the estimating and tendering process.

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Performance criteria

To develop estimates and tenders

You must be able to:

- P1 ensure that sufficient organisational resources are available to meet the tender deadline in accordance with the project
- P2 plan the preparation of the tender and collate all necessary information prior to commencement
- P3 if appropriate, assess the status and financial viability of the potential client and suppliers in accordance with the practices of your organisation
- P4 use the information provided by the potential client to identify the sequence of work and the types of plant, labour and materials required for the project.
- P5 assess the potential cost of plant, labour and material requirements and their availability against the requirements of the project
- P6 apply the organisation's estimating systems to estimate the quantities of plant, labour and materials in relation to the requirements of the project
- P7 establish the costs of plant, labour and materials derived from potential sources in accordance with the requirements of the project
- P8 establish the estimated cost for each activity in accordance with the requirements of the project
- P9 incorporate the requirements for a method statement and risk assessments into the tender
- P10 seek clarification from the relevant person(s) where there are potential problems with the tender information provided
- P11 finalise total estimated costs in accordance with the procedures of your organisation
- P12 make commercially confidential information, held in any format, available only to authorised person(s)
- P13 confirm that the information contained within the completed estimate is accurate and represents your organisation in a professional manner
- P14 finalise and distribute promptly the completed estimate to the relevant person(s) for authorisation, adjudication and submission as a tender bid in accordance with organisational procedures
- P15 present the tender information in a manner most likely to achieve acceptability
- P16 record and store all relevant information used in the tender preparation
- P17 monitor the progress of the tender and check if further information is required
- P18 review the tendering process to establish areas for improvement within your organisation
- P19 seek feedback where the tender was unsuccessful and record and communicate the explanation to the relevant person

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Knowledge and understanding

You need to know and understand:

- K1 the deadline for submission of the tender
- K2 the resources , including information technology software that are available to your organisation for the purposes of tendering
- K3 how to evaluate whether these resources will be sufficient
- K4 the organisation's schedule of work and its implications for the tender
- K5 if appropriate, how to assess the status and financial viability of the potential client and suppliers in accordance with the practices of your organisation
- K6 what information will need to be included within the tender
- K7 how to prepare a schedule of work
- K8 how to assess plant, labour and materials required in accordance with the following factors:
 - K8.1 types required
 - K8.2 availability
 - K8.3 cost
 - K8.4 quantity
 - K8.5 your organisation's estimating systems
 - K8.6 the requirements of the tender
- K9 how to obtain competitive costings of plant, labour and materials derived from potential sources in accordance with the requirements of the project
- K10 delivery times of plant, labour and materials
- K11 the implications of long and lead times, extended delivery dates and required completion times
- K12 who can clarify potential problems arising from the tender information provided
- K13 how to incorporate the requirements of method statements and risk assessments into the organisation's schedule of work to meet the project requirements
- K14 the implications of the requirement of method statements and risk assessments within the tender specification
- K15 what is commercially confidential information and who is permitted to view it
- K16 who needs to authorise the tender bid and submission of the tender bid
- K17 organisational procedures for recording and storing information used in tender preparation
- K18 how to confirm with the relevant person(s) what contractual and legal issues will affect the project
- K19 how to monitor the progress of the tender and check if further information is required

- K20 how to advise the relevant person(s) of problems relating to extended

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delivery dates

K21 how to review the tendering process to establish areas for improvement within your organisation

K22 from whom you should obtain feedback and to whom it should be communicated

Additional Information

Glossary

Client Information:

These are the sources of information provided by the client that include the invitation to tender and any drawings and specifications. Some of this information may be subject to commercial confidentiality, and, as such, may not be disclosable to some person(s), organisations etc.

Potential Sources

These can be internal or external sources.

Project

The scope of works as defined in the tender documents including drawings and specifications.

Relevant person(s)

These are persons who are fully conversant with the contents of the tender and could include persons representing the client and / or your organisation. It could also include a sub contractor or external contractors.

Authorised person(s)

These are persons who are authorised in the terms of the tender to receive confidential information.

Adjudication

The action taken by management to convert an estimate into a tender.

Estimate

This is the cost to your organisation for undertaking the project as laid out in the tender drawings and specification.

Tender

The bid price for the project including mark up as applied in the tender adjudication process.

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