

<b>Title</b>	<b>Conduct procurement processes and evaluate tenders</b>		
<b>Level</b>	<b>6</b>	<b>Credits</b>	<b>20</b>

<b>Purpose</b>	People credited with this unit standard are able to: describe the appointment and briefing of an evaluation team for tenders; process tenders for a contract; evaluate tenders for a contract; manage communication with tenderers throughout the evaluation process in relation to contract award; and prepare a tender evaluation report.
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<b>Classification</b>	Infrastructure Civil Engineering > Infrastructure Asset Management
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<b>Available grade</b>	Achieved
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### Guidance Information

- 1 All evidence for this unit standard must be in accordance with current editions, and any subsequent amendments, of the following:
  - *Government Procurement Rules: Rules for Sustainable and Inclusive Procurement* (4<sup>th</sup> ed.). (Ministry of Business, Innovation and Employment, 2019) available at <https://www.procurement.govt.nz>.
  - *Procurement manual for activities funded through the National Land Transport Programme* (New Zealand Transport Agency, 2018), available at <http://www.nzta.govt.nz/resources/procurement-manual/>.
- 2 Definition  
RFx refers to one of the following – request for proposal, request for tender, request for quotation, registration of interest. These may include the tender advertisement, conditions of tender, General Conditions of Contract, Special Conditions of Contract, specifications, drawings, or Schedule of Prices.
- 3 Processing and evaluation of tenders must be carried out in accordance with the procedures described in the RFx document and the purchaser's published procurement policies and procedures.

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### Outcomes and performance criteria

#### Outcome 1

Describe the appointment and briefing of an evaluation team for tenders.

**Performance criteria**

- 1.1 Appointment of the tender evaluation team is described in terms of the process and criteria for appointment, technical and procurement skills, and identification and management of conflicts of interest.
- 1.2 Briefing of the tender evaluation team is described in terms of project background, rationale for selection of evaluation process and weightings, testing of weightings used, timing for evaluation deliverables, expectations or restrictions on evaluation team members, and conflicts of interest.

**Outcome 2**

Process tenders for a contract.

Range two examples using supplier selection methods chosen from – lowest price conforming, weighted attributes, price quality, quality-based selection.

**Performance criteria**

- 2.1 Tenders are opened and checked for completeness.
- Range includes but is not limited to – complete documentation, incorrect packaging, communications, tags, alternative tenders, calculation errors, late tenders.
- 2.2 Tender documents are processed.
- Range includes but is not limited to – request for clarification, procedures for dealing with tags, pre-letting meeting, responding to queries during the tender period.
- 2.3 Tenders are processed in a manner that minimises processing activity and delays and also enables robust, accurate and compliant management of tender processes.

**Outcome 3**

Evaluate tenders for a contract.

Range two examples using supplier selection methods chosen from – lowest price conforming, weighted attributes, price quality, quality-based selection.

**Performance criteria**

- 3.1 Evaluation is undertaken that allows clear benchmarking and justification of the scores allocated to each of the tenderers.

- 3.2 Non-price attributes are evaluated to pre-determined objective standards which are agreed by the tender evaluation team prior to commencement of the evaluation.
- Range includes but is not limited to – selection is based on professional and technical principles unaffected by politics of client or personal knowledge outside the tender process.
- 3.3 Records of moderation of scores and/or application of objective criteria are documented to support final evaluation decisions.
- Range includes but is not limited to – reference checking is consistent, fair, and recorded.
- 3.4 Alternative proposals are evaluated in a manner that enables comparison of their features and/or advantages against those of conforming tenders.
- 3.5 Evaluation activities and contract award procedures are completed in a manner that minimises unnecessary evaluation activity and maintains robust consideration of value for money, both for the immediate contract and over the life of the asset.

#### **Outcome 4**

Manage communications with tenderers throughout the evaluation process in relation to contract award.

#### **Performance criteria**

- 4.1 Notices to Tenderers and/or notices to specific tenderers are provided to clarify aspects of the tendering process, deal with tender tags and/or clarifications.
- 4.2 Consideration is given to abandoning or revising the tendering process where a large number of Notices to Tenderers is evident.
- 4.3 Records of communications are filed and organised.
- 4.4 Appropriate post-evaluation communications are sent.
- Range may include – notice of preferred tenderer, letters of acceptance, letters to unsuccessful tenderers, confirmation of contract award.
- 4.5 Debriefs are provided to unsuccessful tenderers.
- Range includes but is not limited to – letter of invitation, agenda, comprehensive minutes of meeting, feedback on process, feedback on improving scores.

#### **Outcome 5**

Prepare a tender evaluation report.

Range two examples using supplier selection methods chosen from – lowest price conforming, weighted attributes, price quality, quality-based selection.

### Performance criteria

5.1 Tender evaluation report is prepared with recommendations from the evaluation team.

Range identification of evaluation team members and leader; procurement planning and background information; rationale for supplier selection method and attribute selection, weightings and evaluation criteria, pass/fail criteria if applicable, treatment of tags, late tenders, alternative tenders as applicable, detailed description of the rationale for scoring for each tenderer's response, analysis of scores and/or pricing; recommendations.

<b>Planned review date</b>	31 December 2024
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### Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	22 January 2002	31 December 2011
Review	2	24 September 2003	31 December 2011
Review	3	18 March 2011	31 December 2017
Review	4	19 May 2016	31 December 2021
Review	5	22 August 2019	N/A

<b>Consent and Moderation Requirements (CMR) reference</b>	0101
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

### Comments on this unit standard

Please contact Connexis – Infrastructure Industry Training Organisation [qualifications@connexis.org.nz](mailto:qualifications@connexis.org.nz) if you wish to suggest changes to the content of this unit standard.