

CPCBC4013

PREPARE AND EVALUATE TENDER DOCUMENTATION

PRACTICAL ASSESSMENT

Participant name	Leah Hellewell
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FOR THE PARTICIPANT
Instructions - The tasks outlined on the following pages will require performance of normal workplace activities, as a result of a structured activity set by an Observer in the workplace or a simulated activity set by your Assessor/Observer. - The timeframe for these tasks will be established by your Assessor/Observer, in consideration of location conditions and industry requirements. - You must complete all tasks unassisted by the Assessor or other personnel unless the steps note this assistance. - You must attempt all tasks (and itemised steps) for a 'Satisfactory' assessment outcome to be awarded. - For any observation conducted that is incomplete, or without satisfactory performance, the observation will need to be completed again after further training support.

FOR THE ASSESSOR/OBSERVER
Instructions - The following observation record should be used to judge and record your observations of the Participant as they complete the task(s) set. You must record your observations of the Participant's performance. - For each occasion, indicate the task performed and whether it was a simulation or workplace-based task. - Any simulated assessment must ensure the Participant still performs under workplace conditions which reflect industry standards. - In the comments, provide clear detail regarding the task that the Participant was required to do (e.g. PPE used, materials handled, attachments connected, plant types). - All steps must be satisfactorily demonstrated by the Participant for a 'Satisfactory' determination (indicated by an Assessor tick to the right of each itemised step, or an Observer tick to the right of each itemised step, and confirmation by an Assessor in the Assessor Comments). - Where you have determined that one or more task steps have not been satisfactorily demonstrated, provide the Participant with additional support and outline details of such assistance in the Assessor/Observer Comments. Allow the Participant two (2) further opportunities to demonstrate the task again to allow an opportunity for a 'Satisfactory' assessment outcome to be achieved. - If after three (3) attempts the Assessor determines that the Participant cannot demonstrate the required steps, a 'Not Satisfactory' outcome is to be determined.

TASK OUTCOME					
Task	Date	Task Type (Tick)	Location	Task outcome (Tick)	
				Satisfactory	Not Satisfactory
Task 1 (Occasion 1)	20/9/24	☐ Workplace ☒ Simulation	Merrimac	☐	☐
Task 1 (Occasion 2)	20/9/24	☐ Workplace ☒ Simulation	Merrimac	☐	☐

ASSESSOR COMMENTS: GENERAL**As necessary, outline:**

- Details on reattempts, alternative arrangements or reasonable adjustments made.
- Where a Participant is deemed 'Not Satisfactory', provide recommendations for future training.

ASSESSOR COMMENTS: PRACTICAL TASK 1: OCCASION 1 Residential tender

☒ Individual student (as named on cover page) ☐ Multiple students [☐ All from Attendance Report, ☐ Specific students involved – identify students]	
Task	Provide detail
1.1A.	Specify information collected from current and approved project plans, specifications and project documentation:
1.1B.	Was the participant able to understand the documentation sufficiently to extract information relevant to the tendering process. ☐ Yes ☐ No
1.1C. 1.2C. 1.4C. 1.4D.	Specify equipment and programs used to extract and send information and confirm compliance and to develop documents:
1.1D. 1.3A.	Specify workplace forms, contracts and documents accessed to achieve required outcomes:
1.1E.	Specify plans, specifications and tender documentation checked for currency and amendments:
1.1F.	Specify where determined risks were documented:
1.3B.	Specify supporting documents attached/ inserted to tender application:

ASSESSOR COMMENTS: PRACTICAL TASK 1: OCCASION 2 Commercial tender

☒ Individual student (as named on cover page) ☐ Multiple students [☐ All from Attendance Report, ☐ Specific students involved – identify students]	
Task	Details
1.1A.	Specify information collected from current and approved project plans, specifications and project documentation:
1.1B.	Was the participant able to understand the documentation sufficiently to extract information relevant to the tendering process. ☐ Yes ☐ No
1.1C. 1.2C. 1.4C. 1.4D.	Specify equipment and programs used to extract and send information and confirm compliance and to develop documents:
1.1D. 1.3A.	Specify workplace forms, contracts and documents accessed to achieve required outcomes:
1.1E.	Specify plans, specifications and tender documentation checked for currency and amendments:
1.1F.	Specify where determined risks were documented:
1.3B.	Specify supporting documents attached/ inserted to tender application:

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PREPARE AND EVALUATE TENDER DOCUMENTATION

Practical Task 1 (2X)

Description of task:

The participant must prepare tender documents for two (2) contracts, one (1) for a residential project (Occasion 1) and one (1) for a commercial project (Occasion 2). Workplace or created documents must be used for this assessment although a template is available for the Tender Submission Evaluation Checklist. The participant must demonstrate:

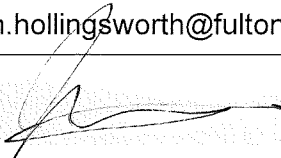
- Research project requirements.
 - Collect relevant information for tender preparation from current and approved project plans, specifications and project documentation.
 - Read and understand documentation sufficiently to extract relevant information from complex text.
 - Use equipment and programs to access and extract information to develop relevant documentation.
 - Select contracts and tender documents appropriate to the situation and requirements.
 - Source and check relevant plans, specifications and tender documentation for currency and amendments.
 - Evaluate and document risks associated with contracts and tender processes.
- Prepare tender documentation.
 - Collate all information for tender preparation and check for accuracy.
 - Prepare tender documentation to correspond with selected contracts and organisational processes and procedures. (*Create bill of quantities; Costing documents for materials and labour*)
 - Use appropriate equipment and programs to develop relevant documentation.
- Attach supporting documentation.
 - Select appropriate forms and format to accurately complete relevant documentation required to submit with the tender (*Tender Submission Draft*).
 - Attach vital information, drawings, specifications or other supporting evidence to the tender document.
 - Develop a client acceptance form to forward to the client with a request for any amendments and conditions to the tender or contract (*Client Acceptance Forms*)
- Obtain tender approval or endorsement.
 - Check all completed tender documentation for compliance to requirements and workplace processes (*Tender submission evaluation checklist template available*).
 - Develop an appropriate client contract for the project ready for approval. (*Completed client contract*)
 - Provide tender documentation to relevant staff member for approval or endorsement. (*Completed tender documentation*).
 - Use tools and devices to communicate and collaborate effectively with others.

These tasks may be simulated or real. The Participant is to gather evidence of how they have completed each component of the Practical Task, which is to be submitted with this Practical Assessment sheet. The Observer is to provide detailed comments on the tasks completed by the Participant (on the Observer Comments, overleaf). The Assessor is to verify the Observer's comments, noting their findings in the Assessor Comments (on the back of the Practical Assessment cover page) and provide the assessment outcome.

Resources required:

One residential and one commercial contract for tendering; Access to government legislation; building and construction codes, NCC and standards; construction contracts and associated tender documentation; organisational procedures and quality documents, templates; business technology, applications and software to produce tender documentation.

Observer details

Name of observer:	Ian Hollingsworth
Role of observer (Confirm suitability to sign)	Project Manager
Email address of observer	ian.hollingsworth@fultonhogan.com.au
Signature of observer:	
Date:	21/09/2024

When completing the task, did the Participant:	Tick if satisfactorily completed. Provide comments if left unticked.	
	1 st Occasion	2 nd Occasion
1 Research project requirements.		
1.1A. Collect relevant information for tender preparation from current and approved project plans, specifications and project documentation.	☒	☐
1.1B. Read and understand documentation sufficiently to extract relevant information from complex text.	☒	☐
1.1C. Use equipment and programs to access and extract information to develop relevant documentation.	☒	☐
1.1D. Select contracts and tender documents appropriate to the situation and requirements.	☒	☐
1.1E. Source and check relevant plans, specifications and tender documentation for currency and amendments.	☒	☐
1.1F. Evaluate and document risks associated with contracts and tender processes.	☒	☐
2 Prepare tender documentation.		
1.2A. Collate all information for tender preparation and check for accuracy.	☒	☐
1.2B. Prepare tender documentation to correspond with selected contracts and organisational processes and procedures. <i>(Create bill of quantities; Costing documents for materials and labour)</i>	☐	☒
1.2C. Use appropriate equipment and programs to develop relevant documentation.	☒	☐
3 Attach supporting documentation.		
1.3A. Select appropriate forms and format to accurately complete relevant documentation required to submit with the tender <i>(Tender Submission Draft)</i> .	☒	☐
1.3B. Attach vital information, drawings, specifications or other supporting evidence to the tender document.	☒	☐
1.3C. Develop a client acceptance form to forward to the client, requesting any amendments and conditions to the tender or contract. <i>(Client Acceptance Forms)</i>	☒	☐
4 Obtain tender approval or endorsement.		
1.4A. Check all completed tender documentation for compliance to requirements and workplace processes <i>(Tender submission evaluation checklist template available)</i> .	☒	☐
1.4B. Develop an appropriate client contract for the project ready for approval. <i>(Completed client contract)</i>	☐	☒
1.4C. Provide tender documentation to relevant staff member for approval or endorsement. <i>(Completed tender documentation)</i> .	☒	☐
1.4D. Use tools and devices to communicate and collaborate effectively with others.	☒	☐