



ASSESSMENT WORKBOOK



CPCCBBC4013

Prepare and evaluate tender documentation

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Introduction

The assessments in this workbook are divided into three categories: Knowledge Assessment and Practical Assessment.

The **Knowledge Assessment** is a set of general and workplace questions testing your knowledge and understanding of the general theory behind the unit.

You must answer all Knowledge Assessment Questions using your own words. However, you may refer to your Learner Guide and other relevant resources and learning materials to complete this assessment.

Some questions cover processes you would likely encounter in a workplace. Ideally, you should be able to answer these questions based on the processes that are currently in place in your workplace. However, if you do not currently have access to a workplace, then answer the questions based on processes that should be implemented in a typical workplace setting.

The **Practical Assessment** is made up of the **Practical Assignment and Workplace Assessment**. This assessment tests your practical skills with respect to the requirements of the unit of competency relevant in this workbook.

The Practical Assessment requires you to complete and submit workplace documents and other documentation relevant to the unit of competency.

The evidence you submit must be your own work except where due reference is made and where you are required to submit supplementary workplace documents such as policies and procedures.

When completing the assessments included in this workbook:

1. Read the instructions provided in each task carefully before attempting to complete the task. The instructions will guide you on how to answer the question or complete the task satisfactorily.
2. Follow the steps provided in each task.
 - If the question instructs you to describe, provide a description as your response. If the question instructs you to list, provide a list as your response.
 - Where there is a number of required responses, provide the required number of responses. For example, if you are asked to list three responses, provide three responses.
3. Ensure that all your submissions for this assessment indicate your first and last name and that these submissions have been named according to the file naming convention prescribed in each task.

Competency-Based Assessments

Definition of Competency

Assessment in this context can be defined as the fair, valid, reliable, and flexible gathering and recording of evidence to support the judgement on whether competency has been achieved. Skills and knowledge (developed in a structured learning situation, at work, or in some other context) are assessed against national standards of competence required by industry, rather than compared with the skills and knowledge of other candidates.

The features of a competency-based assessment system are:

- It is focused on what candidates can do and whether it meets the criteria specified by the industry as competency standards.
- Assessment should mirror the environment the candidate will encounter in the workplace.
- Assessment criteria should be clearly stated to the candidate at the beginning of the learning process.
- Assessment should be holistic. That is, it aims to assess as many elements and/or units of competency as is feasible at one time.
- In competency assessment, a candidate receives one of only two outcomes – ‘competent’ or ‘not yet competent.’
- The basis of assessment is in applying knowledge for some purpose. In a competency system, knowledge for the sake of knowledge is seen to be ineffectual unless it assists a person in performing a task to the level required in the workplace.
- The emphasis in assessment is on assessable outcomes that are clearly stated for the trainer and candidate. Assessable outcomes are tied to the relevant industry competency standards where these exist. Where such competencies do not exist, the outcomes are based upon those identified in a training needs analysis.

Assessing Nationally-Recognised Training

Developing and conducting assessment, in an Australian Vocational Education and Training (VET) context, is founded on the Principles of Assessment and the Rules of Evidence:

Principles of Assessment

1. Assessment must be valid

- Assessment must include the full range of skills and knowledge needed to demonstrate competency.
- Assessment must include the combination of knowledge and skills with their practical application.
- Assessment, where possible, must include judgements based on evidence drawn from a number of occasions and across a number of contexts.

2. Assessment must be reliable

- Assessment must be reliable and must be regularly reviewed to ensure that assessors are making decisions in a consistent manner.
- Assessors must be trained in national competency standards for assessors to ensure reliability.

3. Assessment must be flexible

- Assessment, where possible, must cover both the on- and off-the-job components of training within a course.
- Assessment must provide for the recognition of knowledge, skills, and attitudes regardless of how they have been acquired.
- Assessment must be made accessible to candidates through a variety of delivery modes, so they can proceed through modularised training packages to gain competencies.
- Assessment must be mutually developed and agreed upon between assessor and the assessed.
- Assessment must be able to be challenged. Appropriate mechanisms must be made for reassessment as a result of challenge.

4. Assessment must be fair

- Assessment process must consider the individual needs of the candidate.
- Assessment must provide for reasonable adjustments, where appropriate, to consider the individual candidate's needs.

(Source: Standards for RTOs 2015, Clauses 1.8 – 1.12)

Rules of Evidence

When collecting evidence, certain rules apply to that evidence. All evidence must be valid, sufficient, authentic, and current:

1. Valid

Evidence gathered should meet the requirements of the unit of competency. This evidence should match, or at least reflect, the type of performance that is to be assessed, whether it covers knowledge, skills, or attitudes.

2. Sufficient

This rule relates to the amount of evidence gathered. Enough evidence must be gathered to satisfy the requirements that the candidate be competent in all aspects of the unit of competency.

3. Authentic

When evidence is gathered, the assessor must be satisfied that evidence is the candidate's own work.

4. Current

This relates to the recency of the evidence and whether the evidence relates to current abilities.

(Source: Training in Australia by M Tovey, D Lawlor)

Dimensions of Competency

The national concept of competency includes all aspects of work performance and not only narrow task skills. The four dimensions of competency are:

1. Task skills
2. Task management skills
3. Contingency management skills
4. Job or role environment skills

Reasonable Adjustment

'Reasonable adjustment' in VET is the term applied to modifying the learning environment or making changes to the training delivered to assist a candidate with a disability. A reasonable adjustment can be as simple as changing classrooms to be closer to amenities or installing a particular type of software on a computer for a person with vision impairment.

Why make a reasonable adjustment?

We make reasonable adjustments in VET to make sure that candidates with a disability have:

- The same learning opportunities as candidates without a disability, and
- The same opportunity to perform and complete assessments as those without a disability.

Reasonable adjustment applied to participation in teaching, learning, and assessment activities can include:

- Customising resources and assessment activities within the training package or accredited course
- Modifying the presentation medium
- Learner support
- Use of assistive/adaptive technologies
- Making information accessible both before enrolment and during the course
- Monitoring the adjustments to ensure candidate needs continue to be met

Assistive/Adaptive Technologies

Assistive/Adaptive technology means 'software or hardware that has been specifically designed to assist people with disabilities in carrying out daily activities' (World Wide Web Consortium - W3C). It includes screen readers, magnifiers, voice recognition software, alternative keyboards, devices for grasping, visual alert systems, digital note-takers.

(Adapted Reasonable Adjustment in teaching, learning and assessment for learners with a disability - November 2010 - Prepared by - Queensland VET Development Centre)

IMPORTANT:

Reasonable adjustment made for collecting candidate assessment evidence must not impact on the standard expected by the workplace, as expressed by the relevant unit(s) of competency. For example, if the assessment were gathering evidence of the candidate's competency in writing, allowing the candidate to complete the assessment verbally would not be a valid assessment method. The method of assessment used by any reasonable adjustment must still meet the competency requirements.

The Unit of Competency

The units of competency specify the standards of performance required in the workplace.

This assessment addresses the following unit of competency:

CPCBC4013 - Prepare and evaluate tender documentation (Release 1)

1. Research project requirements.
2. Prepare tender documentation.
3. Attach supporting documentation.
4. Obtain tender approval or endorsement.

A complete copy of the above unit of competency can be downloaded from the TGA website:

<https://training.gov.au/Training/Details/CPCCBC4013>

The Context of Assessment

To complete the assessments in this workbook, students need to have access to their learning materials and the Internet. The Knowledge Assessment may be completed wholly at the candidate's home or chosen place of study. The Practical Assessment must be completed in a workplace or a simulated environment.

Assessment Methods

This workbook uses the following assessment method/s:

- 1. Knowledge Assessment**

A set of general and workplace questions testing the candidate's general knowledge and understanding of the general theory behind the unit.

- 2. Practical Assignment**

A series of written practical tests assessing the candidate's practical knowledge and understanding of the unit of competency.

- 3. Workplace Assessment**

A set of tasks or activities completed according to set instructions and guidelines to meet the requirements of the relevant unit. These tasks and activities require you to have access to a workplace or a similar environment.

Resources Required for Assessment

The Training Organisation to provide/organise candidate with access to:

- Workplace, or a similar environment, where the candidate can complete the assessments, and that will allow them access to:
 - Building and construction project:
 - One residential building and construction project, AND
 - One commercial building and construction project
 - Opportunities to complete the workplace assessment tasks within this project.
 - Construction project plans
 - Construction project specifications
 - Project tender documentation
 - Building and construction contracts
 - Organisational documents, including:
 - Documents containing the organisation's processes and procedures and other details of the organisation's profile.
 - Documents containing the organisation's costing system.
 - Documents containing the organisation's tendering system.
 - Documents containing the organisation's contracting system.
 - Any people resources required for assessment, including:
 - Relevant personnel from whom plans, specifications and project tender documentation will be sourced
 - Relevant personnel with whom the candidate will be checking the currency of relevant construction project documents and any amendments
 - Relevant personnel to whom the candidate will submit the completed tender documentation for endorsement
 - Organisational policies and procedures, including
 - Policies and procedures relevant to sourcing relevant construction project documents for tender preparation
 - Policies and procedures relevant to reviewing and checking the currency of plans, specifications and project tender documentation and amendments
 - Organisational processes and procedures relevant to preparing tender documentation
 - Policies and procedures relevant to submitting tender documentation to the client organisation's tendering personnel (e.g. Tendering Administrator)
 - Documentation templates, including:
 - Meeting minutes template
 - Template for Tender Preparation Document

- Template for documenting risks
- Template for Bill of Quantities
- Template for Tender Submission Draft
- Template for Client Acceptance Forms
- Template for drafting Amendments and Conditions to the Tender/Contract
- Tender Submission Evaluation Checklist
- Template for drafting Client Contract
- Costing software program for estimating the cost of:
 - Residential building, AND
 - Commercial building
- Word processing program (e.g. MS Word, WPS Writer, Google Docs)
- Current relevant government legislation
- Current relevant building and construction codes and standards
- Construction contracts and associated tender documentation

- Business technology, applications, and software to produce tender documentation
- Digital devices, applications, and software to transmit and receive information electronically.

The candidate will need access to:

- Computer with Internet, email access, and a working web browser
- Installed software: MS Word, Adobe Acrobat Reader

Assessment Workbook Cover Sheet

To the candidate: Print this cover sheet and complete it by filling in all the required information and signing in the space provided. Your signature must be handwritten. Scan the completed cover sheet and submit it along with your evidence submissions.

Use the filename: **CPCCBC4013 Cover Sheet**

Workbook	CPCCBC4013
Title	Prepare and evaluate tender documentation (Release 1)
First and Last Name	Noreen Abu-Obeid
Phone	0415818248
Email	nabuobeid@gmail.com

Please read the Candidate Declaration below and if you agree to the terms of the declaration, sign and indicate the date in the spaces provided.

By submitting this work, I declare that:

- I have been advised of the assessment requirements, have been made aware of my rights and responsibilities as an assessment candidate, and choose to be assessed at this time.
- I am aware that there is a limit to the number of submissions that I can make for each assessment, and I am submitting all documents required to complete this Assessment Workbook.
- I have organised and named the files I am submitting according to the instructions provided. I am aware that my assessor will not assess work that cannot be identified and may request the work be resubmitted according to the correct process.
- This work is my own and contains no material written by another person except where due reference is made. I am aware that a false declaration may lead to the withdrawal of qualification or statement of attainment.
- I am aware that there is a policy of checking the validity of qualifications that I submit as evidence as well as the qualifications/evidence of parties who verify my performance or observable skills. I give my consent to contact these parties for verification purposes.

Name: Noreen Abu-Obeid

Signature: 

Date signed: 8/02/2023

Knowledge Assessment

1. Answer the following questions about Australian Standards relevant to tender documentation.

i. What is the full title of AS 4120 - 1994?

Australian Standard Code of Tendering

ii. What is the scope of AS 4120 - 1994?

The scope sets out the ethics and obligations of the principal and tenderers in the tendering process in the construction industry, including the selection of contracts and subcontractors and is met by the below. This significantly benefits the community through the delivery of higher productivity, high quality construction work, better working conditions and elimination of malpractice.

- All aspects of the tendering process are conducted with honesty and fairness at all levels
- All parties conform to legal obligations
- All parties identify ownership of intellectual property used and ensure these are not infringed
- All parties should engage only if proceeding
- All parties should not engage and give other party an improper advantage over another
- Tenderers must not engage in collusive practice
- Every tendering condition must be the same for all tenderers on the project
- Clients must clearly specify their requirements in the tender documents and clearly indicate the criteria for evaluation
- All evaluation of tenders must be based on the criteria defined
- All tender documents treated in confidentiality
- No parties with conflict of interest can participate and must declare that interest immediately known.

iii. List two other Australian Standards relevant to project risks (e.g. project delays, payment disputes) associated with tendering.

- a. AS2124-1992
- b. QLD code of practice for the Building and construction industry (QCOP)

2. Answer the following questions about building and construction regulations relevant to the tendering process.

i. What are the eight national principles for client and tenderer practices according to the National Code of Practice for the Construction Industry (NCOP)?

- a. Clients rights and responsibilities
- b. Relationships
- c. Competitive behaviour

	d. Continuous improvement and best practice e. Workplace reform f. Occupation Health, Safety and Rehabilitation g. Industrial relations and workplace reform h. Security of payment
ii.	Provide three key ethical principles outlined by the NCOP to ensure ethical behaviour at all stages of a project? a. All aspects of the tendering process must be conducted with honesty and fairness at all levels of the industry b. Parties must conform to all legal obligations c. Parties must not engage in any practice which gives one party an improper advantage over another
iii.	Based on the state/territory you are in, what is the corresponding code adapted from the NCOP? State/Territory: QLD State/Territory Code: QCOP

3. Answer the following questions about the National Construction Code (NCC).

- i. Differentiate NCC Volume 1, NCC Volume 2, and NCC Volume 3 from each other by identifying the application of each volume.

NCC Volume 1 covers:

Applies to and contains the technical design and construction requirements for Class 2 to 9 (multi-residential, commercial, industrial and public) buildings and structures, including access requirements for people with disability in class 1b and 10a buildings and 10b structures like swimming pools.

NCC Volume 2 covers:

Applies to and contains the technical design and construction requirements for Class 1 (residential) and 10 (non habitable) buildings and structures, other than that in volume 1 above, and 10c bushfire shelters

NCC Volume 3 covers:

Applies to technical requirements for the design and construction for plumbing and drainage systems in new and existing buildings for all classes of buildings. It also applies to sites where water services are constructed independent of buildings.

- ii. How is the NCC relevant in preparing and evaluating tender documentation?

A project may adopt either the Performance Solution or the Deemed-to-Satisfy (DTS) Solution. When a building complies with the NCC by using Verification Methods provided in the NCC, this is called a Performance Solution. On the other hand, a Deemed-to-Satisfy Solution follows the Provisions or set recipes of what, when, and how to do something as prescribed in the NCC and the tender documentation to be prepared and evaluated accordingly.

4. Listed in the table below are tender documents. Explain the significance of each document in preparing a tender.

Documents	Significance
i. A letter of invitation to tender	This is provided by the client to the tenderer's inviting them to tender for the construction project and contains the terms of invitation with instructions to the tenderer's including scope of the project and inviting the organizations to submit a formal tender to bid for the work.
ii. Form of tender	This is a covering document prepared by the clients and agreed and signed by the tenderer to show that they have understood the tender terms and conditions and requirements to participate in this tendering process.
iii. Pre-construction information	The relevant tests and inspections done during pre-construction, such as land/site preparation, are required to assess the construction site and processes for the project and are deemed as pre-construction information. Their reports and findings should be presented so that details on crucial areas of the construction project are addressed including ways to address these and prevent any risks as well.
iv. Site waste management plan	This plan allows to lay out the objectives in construction waste management to minimize the amount of waste generated in the project and to maximize the material sent for reuse, recycle or reprocessing. It helps to identify cost-saving opportunities and reduce wastes and maintain order on site.
v. Contract conditions	These are conditions forming part and parcel of the Contract are obligations to be met and to be complied with by all concerned parties.

5. Listed below are supporting documentation in preparing a tender. Explain the significance of each.

Documentation	Relevance
i. Artist's impressions	These are drawings that helps the client and tenderer to have an idea of how the proposed building will look like including the overall design and landscape. It also gives the tenderer an idea of the construction work and materials necessary to complete the building as required.
ii. Building Information Modelling (BIM)	These are 3D models focusing on structural properties of the building, that allow the tenderer to better demonstrate their building project proposal to the clients and it also helps to reduce the risk of missing any important building elements and associated risks, as this can be visualized in a better overall perspective. It helps the tenderer to understand the kind of materials and equipment needed to complete the work.
iii. Product information	This contains specific information from the tenderers regarding the products that have been selected and will be used in the construction project and gives the accurate information of those products that will be used.
iv. Promotional materials	These help the tenderer to obtain a positive image from the client and therefore increase their chances to win the tender.
v. Reports and findings beneficial to the organisation	These are reports and findings presented by tenderers to inform the clients about any important or crucial areas specific to the project and how to address these areas and prevent any risks too.

6. Listed below are project risks associated with tendering.

For each of the following items, provide a brief description and explain how each can impact a project.

Risks	Description	Impact on project
i. Breach of Contract	It is a violation of any of the agreed-upon terms and conditions of a binding contract	The construction project may be suspended until both contracted parties come to a decision or an agreement.

ii. Project delays	This is the time one has taken beyond the completion date specified in the contract or beyond the date that the parties agreed upon to deliver a project.	These can extend the overall duration of the project and can cause increase in project costs.
iii. Payment disputes	These are disagreements between contracted parties regarding payments	These could lead to delays in the project since contracted parties may need to arrive at a mutual decision before project operations can continue
iv. Delays in progress payments	These are when agreed upon payments are paid later than agreed upon or not paid upon the achievement of specific percentages of project completion as specified in the contract.	This can cause delay in project progress, affecting the schedule of work and leading to cost overrun and extension of time and further delays.

7. Listed below are circumstances that pose risks associated with tendering.

For each of the following items explain how each can impact project time and/or cost.

Circumstances	Impact on project time and/or cost
i. Delivery delays that extend project completion dates	When materials are delayed and not delivered on time, the schedule and cost of the project increases as this causes stretching out of the schedule as was planned.
ii. Labour shortages	Labour shortages means delay in project schedule and one sometimes is forced to hire underqualified workers, which may impact the quality of work and this is costly.
iii. Weather	The weather conditions (e.g. high wind, rain, storms) can cause significant project delays. This includes postponing construction tasks and activities during certain weather conditions to protect equipment, hazards, materials etc and cause delays.
iv. Failure to adequately anticipate labour costs	This could lead to additional costs to give proper payment to construction personnel hired for the project. This could lead to an overall increase in the project cost and a loss to the company for such miscalculations.
v. Failure to adequately anticipate materials costs	This could lead to additional costs to purchase the necessary construction materials, therefore leading to an overall increase in the project cost. This could deem as a loss to the company for such miscalculations.
vi. Inappropriate funding levels	Inappropriate funding to materials or labour can cause project delays and losses if not appropriately done at the start.
vii. Funding shortfalls	This would lead to allocating additional costs to areas of shortfall. This would impact other areas where the finances were taken from and hence cause project delays and overall increased cost of the project. If seeking further budget, this may take time and hence cause further delays in project completion.
viii. Industrial disputes through misunderstandings or overt action	Industrial disputes through misunderstandings (e.g. lack of understanding of the contract conditions) or overt action can lead to a breach of contract, if this is not addressed quickly. This could result in the suspension of the construction project, and the delay of the project.

ix. Risk of default or non-performance of key players	When key players of the construction project underperform, this causes the contractor to terminate employment and hire new ones. This takes time and can cause project delays.
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8. Below are sample clauses of an agreement between the client and building organisation. Identify the project risk related to exposure through clauses that work against the building organisation.

- i. Where failure to perform or any delay in the part of the building organisation is caused by events outside the building organisation's control (e.g. civil commotion, acts of god, war, inability to acquire raw materials), duties and obligations of the building organisation shall be suspended for the duration of the event provided that both parties arrive at a mutually acceptable compromise; however, if such a reasonable compromise cannot be reached, either party may terminate this Agreement upon thirty (30) days written notice.

The project risk for this clause is: Force majeure clause

- ii. The building organisation must compensate and hold harmless the client organisation from liabilities, damages, and costs that the client is legally obligated to pay as a result of death, injury to any person, or damage to any property, caused by the building organisation's wilful misconduct, negligent act, error, or omission. Reimbursement for the client shall be based on the percentage of the building organisation's liability.

The project risk for this clause is: Hold harmless clause

9. Listed below are different types of building and construction drawings necessary in preparing and evaluating tender documentation. Explain the purpose of each.

Types of drawings	Purpose
i. Site plan	It shows the general overview of the property including the building site's features and scope of works involved in the entire project
ii. Concept drawings/sketches	It shows general outline of the construction project including the important features required.
iii. Floor plans	It shows the entire layout of the rooms in a building including walls, doors, windows etc
iv. Detail drawings	It provides the detailed description of some part of the building project and includes detailed information about its material and installation
v. Elevations	It shows the exterior face of the building from all directions and is represented accordingly eg) north side, southe, east and west.
vi. Section drawings	It shows the building's sectional view described as being sliced along an imaginary plane and details can be seen from within.

10. Listed below are different types of construction specifications necessary in preparing and evaluating tender documentation. Briefly explain the scope of each.

Types of specifications	Scope
i. Prescriptive specifications	It covers the details for the types of material and its installation
ii. Performance specifications	It covers the operational requirements including details of what the final product needs to be capable of doing, handling and testing procedures involved to ensure it meets its performance specification as required
iii. Proprietary specification	It covers the product and installation details of certain elements/components of that product used in the construction.

11. Answer the following questions about the types of labour through the employee and subcontractor systems.

i. List two differences between skilled and unskilled labour.
a. Skilled labour requires specialised training, while unskilled labour does not require training, background, education or specialized skills
b. Skilled labour cost higher as compared to unskilled labour
ii. List three examples of skilled labour in construction.
a. Licenced Builder
b. Crane operators
c. Licenced electricians
iii. List three examples of unskilled labour in construction.
a. Demolition clean up
b. lifters
c. cleaners

12. Answer the following questions about the scope and usage of labour through the employee and subcontractor systems.

- i. List three differences between the usage of labour in employee systems and subcontractor systems.
- a. Employees must do the jobs assigned to them while subcontractors can accept or reject the jobs
 - b. Employees work the hours established by the employers and contract, while subcontractors work under their own hours that they have chosen to
 - c. Employees are regularly paid according to their employment contract, while subcontractors are paid based on their rate for completing the specific job.

- ii. What is the scope of construction work in employee systems?
- Employees only perform the tasks/activities required of them by their employer and employees are limited to activities that benefit their employer's company.

- iii. What is the scope of construction work in subcontractor systems?
- Subcontractors work across multiple projects with different employers and can perform activities with different employers. They are not tied down.

Practical Assessment

Candidate Instructions

The Practical Assessment is a set of tasks that must be completed in a workplace, or in an environment with conditions similar to that of a real workplace.

This assessment will help you demonstrate skill requirements relevant to selecting, preparing and administering a construction contract.

The Practical Assessment includes the following:

- 1. Practical Assignment**

A series of written practical tests assessing the candidate's practical knowledge and understanding of the unit of competency.

- 2. Workplace Assessment**

A set of tasks or activities completed according to set instructions and guidelines to meet the requirements of the relevant unit. These tasks and activities require you to have access to a workplace or a similar environment.

Preliminary Assessment Information

The tasks in this practical assessment must be completed in a workplace (or a similar environment) and in the context of:

- A residential project, AND
- A commercial project

E.g. You are a builder, a site manager in training, foreperson, or an apprentice in this project, etc.

Before starting the practical assessment, record the following information for your assessor's reference.

When completing the tasks in this practical assessment ensure that your responses and performance must align with the information you have provided below.

For example (but not limited to):

- If the task asks you to refer to building and construction legislation and regulatory requirements, refer to the requirements that apply to the state/territory where your nominated building and construction projects are being undertaken.
- If the task requires you to follow organisational policies and procedures, refer to the policies and procedures in your nominated organisation/workplace.

Residential Project

Work role/title	Administrator
Organisation/workplace	Knights CBI
Building and construction project	Residential
Project overview	
Building classification	1a
Project site address	
State/territory where this project is being undertaken	QLD

Commercial Project

Work role/title	Administrator
Organisation/workplace	Knights CBI
Building and construction project	Commercial
Project overview	
Building classification	
Project site address	
State/territory where this project is being undertaken	QLD

Practical Assignment

Overview

The goal of this assessment is to assess your practical knowledge of:

- Using appropriate costing software programs
- The structure and operations of the organisation's costing, tendering, and contracting system

This assessment has two tasks:

- Task 1 – Appropriate costing software programs
- Task 2 – The organisation's costing, tendering, and contracting system

This task must be completed in the context of the workplace you have nominated in the "Preliminary Assessment Information" section.

You are required to:

- Access and review workplace documents relating to the organisation's costing, tendering, and contracting structure and operations (e.g. workplace docs where you can find information on costing, tendering, and contracting structure and operations)
- Review the task instructions included in this Practical Assignment.
- Record your response as required in the instructions.

Resources required for assessment

- Organisational documents, including:
 - Documents containing the organisation's costing system
 - Documents containing the organisation's tendering system
 - Documents containing the organisation's contracting system

1. Answer the following questions about appropriate costing software programs.

- i. List four examples of costing software programs used in building and construction project.
 - a. Procore
 - b. Buildertrend
 - c. BuildXact
 - d. Stack
- ii. What are the two building and construction costing software programs your organisation is using?
 - a. Manual costing and estimating in the meanwhile as we are a small business yet using Excel spreadsheet and formulas
 - b. Currently looking into either BuildXact or Stack so far

2. Access and review workplace documents relating to the organisation's costing, tendering and contracting structure and operations (e.g. workplace docs where you can find information on costing, tendering and contracting structure and operations) and answer the following questions.

- i. Identify the stakeholders involved in your organisation's building and construction costing system.

Director, Cost estimator, Quality control
- ii. Outline the processes in your organisation's costing operations for building and construction projects.
 - 1. Define cost estimate's purpose including to whom and scope
 - 2. Develop estimating plan and timeline
 - 3. Include all expenses relating to materials, labour, machinery/tools, direct and indirect costs
 - 4. Determine technique to be used and agree and apply
 - 5. Analyse and assess risk and management of these
 - 6. Document estimate and present to management
 - 7. Update cost estimate

iii. Identify the stakeholders involved in your organisation's building and construction tendering system. Project manager Site supervisor Cost estimator Tender relations officer Quality control	iv. Outline the processes in your organisation's tendering operations for building and construction projects. 1. Respond to invitations to Tender 2. Attend Tender meeting and enquires as appropriate 3. Prepare Tender documentation 4. Attach supporting documentation 5. Attach drawings, specifications, plans and schedules 6. Attach amendments and conditions to Tender and Contract 7. Attach acceptance forms and submit tender 8. Await tender analysis, attend to clarifications as required 9. Await tender selection and award 10. Obtain Tender approval 11. Ensure all communications and records above are in writing
v. Identify the stakeholders involved in your organisation's building and construction contracting system. Project manager Contract administrator	vi. Outline your organisation's contracting operations for building and construction projects. Contract Negotiation – ensure to finalize terms of payment, invoicing procedures, any conditions, completion dates, statement of work, service levels and agreements, etc Well drafted final contract agreement to provide all parties with full information as required, including list of deliverables, terms of the contract, preparation and specification documents that were submitted for the tender Contract signature by all parties involved Ensure to share the Consumer Building guide as required

Overview

The goal of this assessment is to assess your practical knowledge and skills in:

- Researching project requirements
- Preparing tender documentation
- Attaching supporting documentation
- Obtaining tender approval or endorsement

This workplace assessment is made up of 16 workplace tasks:

- Task 1 – Source Relevant Construction Project Documents
- Task 2 – Check Currency of Relevant Construction Project Documents and Amendments
- Task 3 – Select Tender Documents
- Task 4 – Draft Tender Preparation Document
- Task 5 – Select Appropriate Contracts
- Task 6 – Record Risks Identified
- Task 7 – Use Costing Software Program
- Task 8 – Prepare Tender Submission Draft
- Task 9 – Check Accuracy of Information Collated for Tender Preparation
- Task 10 – Complete Relevant Tender Documentation for Tender Submission
- Task 11 – Prepare Client Acceptance Forms
- Task 12 – Prepare Amendments and Conditions to the Tender or Contract
- Task 13 – Attach Necessary Documents to the Tender Submission
- Task 14 – Evaluate Completed Tender Documentation
- Task 15 – Complete Appropriate Client Contract
- Task 16 – Submit Tender Documentation for Endorsement

Each task comes with a set of instructions. You are to follow and perform these instructions and submit any required documentation.

IMPORTANT: This unit requires you to perform Tasks 1 – 16 two times.

- Once for a residential project, AND
- Once for a commercial project

You must secure two sets of evidence, one for the residential project and the other for the commercial project you are undertaking.

You are required to:

- Complete the tasks within the time allowed
- Review the instructions in each task.
- Research project requirements.
- Prepare tender documentation.
- Attach supporting documentation.
- Obtain tender approval or endorsement.
- Perform the workplace task according to the instructions provided.
- Complete and submit any required documentation.

Resources required for assessment:

To complete this assessment, you will need access to the following:

- A workplace or a similar environment that will allow you access to:
 - Building and construction project
 - One residential building and construction project, AND
 - One commercial building and construction project
 - Opportunities to complete the workplace assessment tasks within this project.
 - Construction project plans
 - Construction project specifications
 - Project tender documentation
 - Building and construction contracts
 - Organisational documents, including:
 - Documents containing the organisation's processes and procedures and other details of the organisation's profile.
 - Documents containing the organisation's costing system.
 - Documents containing the organisation's tendering system.
 - Documents containing the organisation's contracting system.
 - Organisational documents containing the organisation's processes and procedures and other details of the organisation's profile
 - Any people resources required for assessment, including:

- Relevant personnel from whom plans, specifications and project tender documentation will be sourced
- Relevant personnel with whom the candidate will be checking the currency of relevant construction project documents and any amendments
- Relevant personnel to whom the candidate will submit the completed tender documentation for endorsement
- Organisational policies and procedures, including
 - Policies and procedures relevant to sourcing relevant construction project documents for tender preparation
 - Policies and procedures relevant to reviewing and checking the currency of plans, specifications and project tender documentation and amendments
 - Organisational processes and procedures relevant to preparing tender documentation
 - Policies and procedures relevant to submitting tender documentation to the client organisation's tendering personnel (e.g. Tendering Administrator)
- Documentation templates, including:
 - Meeting minutes template
 - Template for Tender Preparation Document
 - Template for documenting risks
 - Template for Bill of Quantities
 - Template for Tender Submission Draft
 - Template for Client Acceptance Forms
 - Template for drafting Amendments and Conditions to the Tender/Contract
 - Tender Submission Evaluation Checklist
 - Template for drafting Client Contract
- Costing software program for estimating the cost of:
 - Residential building, AND
 - Commercial building
- Word processing program (e.g. MS Word, WPS Writer, Google Docs)
- Current relevant government legislation
- Current relevant building and construction codes and standards
- Construction contracts and associated tender documentation
- Business technology, applications, and software to produce tender documentation
- Digital devices, applications, and software to transmit and receive information electronically.

Task 1 Source Relevant Construction Project Documents

Contact the client organisation, and obtain from them the relevant construction project documents for tender preparation.

These construction project documents must include (at a minimum):

- Relevant construction plans
- Relevant construction specifications
- Project tender documentation

You must contact the client organisation and request that the construction project documents necessary for tender preparation be sent through email. After which, you must download the construction project documents into the computer's drive.

You will be assessed on:

- Practical knowledge of relevant plans, specifications, and project tender documentation
- Practical skills in sourcing relevant plans, specifications, and project tender documentation

Before starting this task, review the **Workplace Assessment Task 1 – Assessor's Checklist** provided along with this workbook. This form lists all the practical skills you need to demonstrate while completing this task.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the following to your assessor:

- Copies of the construction project documents you sourced from the client organisation
- Your email correspondence with the client organisation, which serves as evidence of sourcing the relevant construction project documents

Task 2 Check Currency of Relevant Construction Project Documents and Amendments

Meet with relevant personnel from the client organisation through video conferencing. In this meeting, review the relevant construction project documents you obtained in Task 1 with them and:

- check the currency of these project documents
- confirm if there are still any amendments that need to be made in these documents.

You will be required to provide an email confirming the currency of all project documents.

You will be assessed on:

- Practical knowledge of relevant plans, specifications, and project tender documentation
- Practical skills in reviewing relevant plans, specifications, and project tender documentation

Before starting this task, review the **Workplace Assessment Task 2 – Assessor's Checklist** provided along with this workbook. This form lists all the practical skills you need to demonstrate while completing this task.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the following to your assessor:

- Copies of the relevant construction project documents you reviewed and checked
- An email confirming the currency of all project documents

Task 3 Select Tender Documents

Access and review the project tender documentation you reviewed in Task 2:

1. Select by picking out all tender document from the project tender documentation required for the building and construction project you are undertaking.

Required tender documents may include, but are not limited to:

- Details of tenderer
- Tender schedules
- Information from plans and preliminary design solutions
- Work history of tenderer
- Contract price
- Alternative proposals to achieve greater value for money

2. Identify what each of the selected tender document is.

You will be assessed on:

- Practical knowledge of tender documents required to submit with tender
- Practical skills in selecting tender documents required to submit with the tender

Order of tender document selection	Name of required tender document selected	The candidate correctly selects the tender document
1	Information from plans and preliminary design solutions to develop the specifications Reason: Specifications explain what suppliers need to do during the procurement process. They form a vital part of any tender documentation for the procurement of goods, works and services. Specifications can be: Functional - focussing on what the procurement needs to achieve, which refers to a long-term plan to cost effectively acquire the necessary supplies from a list of efficient vendors who will deliver quality goods on time, abiding by the purchasing terms. Performance - goals that the builder / required trade must meet within the deadline. Technical - with information which includes specific characteristics like the size, type and grading of the required materials. These documents are used to work out the contract price at the beginning of the project. The specifications are a subcontractor's field guide on what materials to use, how to install them, and the desired level of quality.	☐ YES ☐ NO
2	Details of tenderer Knights CBI 123 street, Myland, Brisbane, QLD	☐ YES ☐ NO
3	Work history of the tenderer We are a fully licenced family business who prides itself on its	☐ YES ☐ NO

	family culture and an Australian master builder over the past decade. Our team has the local knowledge, skills, experience, technical expertise and capacity to deliver value and quality in projects we undertake. Our Projects consists of high quality renovations, alterations, extensions, new builds to the needs of our customers and offer high standards for safety, quality and integrity. Reason: Based on understanding the skills, knowledge and expertise needed for the project by understanding properly the information related to the evaluation criteria in place and reflect the procurement's level of complexity	
4	Price	☐ YES ☐ NO
5	Tender schedule Reason: Good planning streamlines the process of selecting suppliers and ensures the integrity of the process. It also guides you when developing a tender response schedule. Criteria to evaluate compliance of offers with the specification, legislative requirements or associated standards. Such evaluation criteria should be developed at the same time as developing the specification	☐ YES ☐ NO
6	Value for money Reason: Combining good planning with other criteria, for example, price, accessibility, delivery, warranty, competent workers, to give an overall assessment of the value for money represented by each offer.	☐ YES ☐ NO
7	Draft contract	☐ YES ☐ NO

	Reason: This describes the relationship between the parties involved and sets out obligation like obligations, performance targets, conditions, payments, quality of goods/services and delivery times etc Ensure it is consistent with information in the rest of the tender documents	
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Commercial Project

Tender document selection	Name of required tender document	The candidate correctly selects the tender document
1	Information from plans and preliminary design solutions to develop the specifications Reason: Specifications explain what suppliers need to do during the procurement process. They form a vital part of any tender documentation for the procurement of goods, works and services. Specifications can be: Functional - focussing on what the procurement needs to achieve, which refers to a long-term plan to cost effectively acquire the necessary supplies from a list of efficient vendors who will deliver quality goods on time, abiding by the purchasing terms. Performance - goals that the builder / required trade must meet within the deadline. Technical - with information which includes specific characteristics like the size, type and grading of the required materials. These documents are used to work out the contract price at the beginning of the project. The specifications are a subcontractor's field guide on what materials to use, how to install them, and the desired level of quality.	☐ YES ☐ NO

2	Details of tenderer Knights CBI 123 street, Myland, Brisbane, QLD	☐ YES ☐ NO
3	Work history of the tenderer We are a fully licenced family business who prides itself on its family culture and an Australian master builder over the past decade. Our team has the local knowledge, skills, experience, technical expertise and capacity to deliver value and quality in projects we undertake. Our Projects consists of high quality commercial scope of works to the needs of our customers and offer high standards for safety, quality and integrity. Reason: Based on understanding the skills, knowledge and expertise needed for the project by understanding properly the information related to the evaluation criteria in place and reflect the procurement's level of complexity	☐ YES ☐ NO
4	Price	☐ YES ☐ NO
5	Tender schedule Reason: Good planning streamlines the process of selecting suppliers and ensures the integrity of the process. It also guides you when developing a tender response schedule. Criteria to evaluate compliance of offers with the specification, legislative requirements or associated standards. Such evaluation criteria should be developed at the same time as developing the specification	☐ YES ☐ NO

6	Value for money Reason: Combining good planning with other criteria, for example, price, accessibility, delivery, warranty, competent workers, to give an overall assessment of the value for money represented by each offer.	☐ YES ☐ NO
7	Draft contract Reason: This describes the relationship between the parties involved and sets out obligation like obligations, performance targets, conditions, payments, quality of goods/services and delivery times etc Ensure it is consistent with information in the rest of the tender documents	☐ YES ☐ NO

Task 4 Draft Tender Preparation Document

Identify information needed for tender preparation from current and approved project plans, specifications, and project tender documentation.

Document this information by drafting a **Tender Preparation Document**. Use your organisation's template for drafting a Tender Preparation Document.

Use the project plans, specifications, and project tender documentation you reviewed in Task 2 as the basis in drafting your Tender Preparation Document submission.

You will be assessed on:

- Practical knowledge of information required for tender preparation
- Practical skills in gathering relevant information from current and approved project plans, specifications, and project documentation for tender preparation

Before starting this task, review the **Workplace Assessment Task 4 – Assessor's Checklist** provided along with this workbook. This form lists the criteria your Tender Preparation Document submission must address to complete this task satisfactorily.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the following to your assessor:

- Tender Preparation Document you drafted
- Project plans, specifications, and project tender documentation you used as basis in drafting the Tender Preparation Document

Task 5 Select Appropriate Contracts

Access and review the project tender documentation you reviewed in Task 2 and select the appropriate contract.

You will be assessed on:

- Practical knowledge of building and construction contracts
- Practical skills in selecting appropriate contracts

Residential Project

- i. Based on the type of residential building to be constructed, what type of contract must be used for this building and construction project?

Residential contract

- ii. Based on contract pricing (e.g. cost plus, lump sum, etc.), what type of contract must be used for this building and construction project?

Lump sum/fixed sum contract

Commercial Project

- i. Based on the type of commercial building to be constructed, what type of contract must be used for this building and construction project?

Commercial Contract

- ii. Based on contract pricing (e.g. cost plus, lump sum, etc.), what type of contract must be used for this building and construction project?

Lump sum

Task 6 Evaluate and Record Risks Identified

Access and evaluate project contracts and tender documents and identify and document risks.

Risks may relate to:

- Breach of contract
- Payment disputes
- Project delays
- Underestimating or overestimating cost of resources
- Force majeure
- Non-performance of key players

Document these risks using relevant templates from your organisation.

You will be assessed on:

- Practical knowledge of risks associated with contracts and tender documents
- Practical skills in identifying and recording risks during the evaluation of contracts and tender documents

Before starting this task, review the **Workplace Assessment Task 6 – Assessor’s Checklist** provided along with this workbook. This form lists the criteria your Identified Risks Document submission must address to complete this task satisfactorily.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the following to your assessor:

- Copy of the risks you identified during your evaluation.
- Contracts used as reference in identifying and recording risks
- Tender documents used as reference in identifying and recording risks

Task 7 Use Costing Software Program

Task 7.1

Create the **Bill of Quantities** for the building project using a costing software program (e.g. BuildXact, Constructor, etc.). Use your organisation's template for creating the Bill of Quantities.

Use the relevant construction project plans and specifications reviewed in Task 2 as basis in creating the Bill of Quantities.

The costing software program you will be using for estimating the cost of the residential building must not be the same for estimating the cost of the commercial building. In other words, if you use BuildXact for estimating the cost of the residential building, you must use another costing software program, such as Constructor, for estimating the cost of the commercial building.

You will be assessed on:

- Practical knowledge of bill of quantities
- Practical skills in using a costing software program to produce the bill of quantities

Before starting this task, review the **Workplace Assessment Task 7.1 – Assessor's Checklist** provided along with this workbook. This form lists the criteria your Bill of Quantities submission must address to complete this task satisfactorily.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the following to your assessor:

- Bill of Quantities created
- Construction project plans and specifications used as basis in creating the Bill of Quantities

Task 7.2

Residential Project

Identify the program you used to create the Bill of Quantities and outline the steps you followed in Task 7.1 to create the Bill of Quantities for the residential project you are undertaking for this assessment.

Program you used to create Bill of Quantities for this project:

Bill of Quantities was created by manual methodology as we are a small business in the path of growing. Currently we are in communication with various costing software companies and are in the process of searching one to proceed with soon. Kindly accept our manual methodology at this stage as requested in Task 7.1. We follow the steps as outlined below

Steps followed:

1. Prepare a spreadsheet and label it accurately
2. Breakdown the work into materials and labour
3. Provide brief description of the materials or labour by providing a break down
4. Provide measurements involved in that particular item
5. Estimate the quantity required
6. Estimate the cost per unit or rate
7. Total the cost
8. Eventually add up all categories on the spreadsheet to have a final Total costings

Commercial Project

Identify the program you used to create the Bill of Quantities and outline the steps you followed in Task 7.1 to create the Bill of Quantities for the commercial building project you are undertaking for this assessment.

Program you used to create Bill of Quantities for this project:

Bill of Quantities was created by manual methodology as we are a small business in the path of growing. Currently we are in communication with various costing software companies and are in the process of searching one to proceed with soon. Kindly accept our manual methodology at this stage as requested in Task 7.1. We follow the steps as outlined below

Steps followed:

1. Prepare a spreadsheet and label it accurately
2. Breakdown the work into materials and labour
3. Provide brief description of the materials or labour by providing a break down
4. Provide measurements involved in that particular item, and for the commercial project, was mainly in square meterage
5. Estimate the cost per unit or square meter (sqm)
6. Total the cost
7. Eventually add up all categories on the spreadsheet to have a final Total costings

Task 8 Prepare Tender Submission Draft

Prepare the **Tender Submission Draft**. Use a word processing program (e.g. MS Word, WPS Office Writer, Google Docs, etc.) in preparing the Tender Submission Draft.

Use your organisation's template for preparing the Tender Submission Draft.

You will be assessed on:

- Practical knowledge of information relevant to tender preparation
- Practical knowledge of selected contracts and organisational processes and procedures
- Practical skills in collating information for tender preparation
- Practical skills in preparing tender documentation to correspond with selected contracts and organisational processes and procedures

Before starting this task, review the **Workplace Assessment Task 8 – Assessor's Checklist** provided along with this workbook. This form lists the criteria your Tender Submission Draft must address to complete this task satisfactorily.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the following to your assessor:

- Tender Submission Draft you prepared
- Relevant documents you used as reference in preparing the Tender Submission Draft including, but not limited to:
 - Tender Preparation Document in Task 4
 - Record of risks in Task 6
 - Relevant plans, specifications, and project tender documentation

Task 9 Check Accuracy of Information Collated for Tender Preparation

Review the information collated in the Tender Submission Draft in Task 8, and check and confirm whether the information:

- Is accurate against the relevant documents where the information was based on, including but not limited to:
 - Tender Preparation Document in Task 4
 - Record of risks in Task 6
 - Relevant plans, specifications, and project tender documentation
- Corresponds with selected contracts
- Corresponds with organisational processes and procedures

You will be assessed on:

- Practical knowledge of information relevant to tender preparation
- Practical knowledge of selected contracts and organisational processes and procedures

- Practical skills in checking the accuracy of information relevant to tender preparation
- Practical skills in checking whether information relevant to tender preparation corresponds with selected contracts and organisational processes and procedures

Residential Project

Candidate to confirm whether:	Candidate's response	Explanation (If answered NO)
1. The information collated in the Tender Document Submission is accurate against the relevant documents where the information was based on	☒ Yes, it is accurate. ☐ No (i.e. there are discrepancies)	
2. The information collated in the Tender Document Submission corresponds with the selected contracts.	☒ Yes, it corresponds. ☐ No (i.e. there are discrepancies)	
3. The information collated in the Tender Document Submission corresponds with organisational processes and procedures.	☒ Yes, it corresponds. ☐ No (i.e. there are discrepancies)	

Commercial Project

Candidate to confirm whether:	Candidate's response	Explanation (If answered NO)
1. The information collated in the Tender Document Submission is accurate against the relevant documents where the information was based on	☒ Yes, it is accurate. ☐ No (i.e. there are discrepancies)	
2. The information collated in the Tender Document Submission corresponds with the selected contracts.	☒ Yes, it corresponds. ☐ No (i.e. there are discrepancies)	
3. The information collated in the Tender Document Submission corresponds with organisational processes and procedures.	☒ Yes, it corresponds. ☐ No (i.e. there are discrepancies)	

Task 10 Complete Relevant Tender Documentation for Tender Submission

Supply and complete the contents required in the relevant tender documentation for tender submission you selected in Task 3.

As mentioned in Task 3, relevant tender documentation to be completed may include, but are not limited to:

- Details of tenderer
- Tender schedules
- Information from plans and preliminary design solutions
- Work history of tenderer
- Contract price
- Alternative proposals to achieve greater value for money

You must use a word processing program (e.g. MS Word, WPS Office Writer, Google Docs, etc.) in supplying and completing the required contents.

You will be assessed on:

- Practical knowledge of relevant documentation required to submit with the tender
- Practical skills in completing relevant documentation required to submit with the tender

Before starting this task, review the **Workplace Assessment Task 10 – Assessor’s Checklist** provided along with this workbook. This form lists the criteria your completed tender documents submissions must address to complete this task satisfactorily.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, you must submit the following to your assessor:

- Completed tender documentation
- Organisational documents containing the organisation’s processes and procedures and other details of the organisation’s profile you used as basis in completing tender documentation
- Project plans, specifications, and other project documentation you used as basis in completing tender documentation

Task 11 Prepare Client Acceptance Forms

Prepare the **Client Acceptance Forms**. Use your organisation’s templates for Client Acceptance Forms.

You will be assessed on:

- Practical knowledge of client acceptance forms
- Practical skills in preparing client acceptance forms

Before starting this task, review the **Workplace Assessment Task 11 – Assessor’s Checklist** provided along with this workbook. This form lists the criteria your Client Acceptance Forms submission must address to complete this task satisfactorily.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the Client Acceptance Forms you drafted to your assessor.

Task 12 Prepare Amendments and Conditions to the Tender or Contract

Prepare the **Amendments and Conditions to the Tender/Contract**. Use your organisation's template for drafting Amendments and Conditions to the Tender/Contract.

You will be assessed on:

- Practical knowledge of amendments and conditions to the tender or contract
- Practical skills in preparing amendments and conditions to the tender or contract

Before starting this task, review the **Workplace Assessment Task 12 – Assessor's Checklist** provided along with this workbook. This form lists the criteria your Amendments and Conditions to the Tender/Contract submission must address to complete this task satisfactorily.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the Amendments and Conditions to the Tender/Contract you drafted to your assessor.

Task 13 Attach Necessary Documents to the Tender Submission

Prepare the completed tender submission by attaching the necessary documents to your Tender Submission Draft in Task 8.

Necessary documents to be attached include the following:

- The relevant tender documents for tender submission you completed in Task 10
- Project plans (including construction drawings), specifications and project tender documentation you used as basis in drafting the Tender Preparation Document in Task 4
- Bill of Quantities in Task 7.1
- Client Acceptance Forms you prepared in Task 11
- Amendments and Conditions to the Tender/Contract you prepared in Task 12

You will be assessed on:

- Practical knowledge of vital information, drawings, construction plans, specifications, project tender documentation, and other supporting evidence
- Practical skills in attaching vital information, drawings, construction plans, specifications, project tender documentation, and other supporting evidence

Before starting this task, review the **Workplace Assessment Task 13 – Assessor’s Checklist** provided along with this workbook. This form lists all the practical skills you need to demonstrate while completing this task.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit a copy of the completed tender submission (i.e. your Tender Submission Draft attached with the necessary documents indicated).

Task 14 Evaluate Completed Tender Documentation

Conduct the final evaluation of completed tender documentation in Task 13.

Use the **Tender Submission Evaluation Checklist** to evaluate the completed tender documentation.

You will be assessed on:

- Practical knowledge of completed tender documentation
- Practical skills in conducting final evaluation of completed tender documentation

Before starting this task, review the **Workplace Assessment Task 14 – Assessor’s Checklist** provided along with this workbook. This form lists the criteria your Tender Submission Evaluation Checklist submission must address to complete this task satisfactorily.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the following to your assessor:

- Tender Submission Evaluation Checklist you completed
- Completed tender documentation you evaluated

Task 15 Complete Appropriate Client Contract

Draft the complete **Client Contract** for the project you are undertaking. Use your organisation's template for drafting Client Contract.

You will be assessed on:

- Practical knowledge of appropriate client contract
- Practical skills in completing appropriate client contract

Before starting this task, review the **Workplace Assessment Task 15 – Assessor's Checklist** provided along with this workbook. This form lists the criteria your Client Contract submission must address to complete this task satisfactorily.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the completed Client Contract you drafted to your assessor.

Task 16 Submit Tender Documentation for Endorsement

Submit the following to the appropriate personnel (e.g. Tender Administrator) of the client organisation through email:

- Copy of the completed tender documentation you evaluated in Task 14
- Completed client contract in Task 15

Secure the client organisation's email response or acknowledgement of receipt of these documents.

You will be assessed on:

- Practical knowledge of tender documentation to be submitted to the appropriate personnel for endorsement
- Practical skills in providing the tender documentation to the appropriate personnel for endorsement

Before starting this task, review the **Workplace Assessment Task 16 – Assessor's Checklist** provided along with this workbook. This form lists all the practical skills you need to demonstrate while completing this task.

Your assessor will also:

- Address your queries and concerns regarding this task.

After completing this task, submit the following to your assessor:

- Submitted tender documentation
- Copy of the completed client contract you submitted
- Your email correspondence with the client organisation, which serves as evidence that the tender documentation has been provided

TO THE CANDIDATE

When you have completed this assessment workbook, review your work, and ensure that:

X. You have completed all the Knowledge Assessments Questions.

X. You have completed the Practical Assessments in this workbook

X. Practical Assignment

X. Appropriate costing software programs

X. The organisation's costing, tendering, and contracting system

X. Workplace Assessment

X. Source Relevant Construction Project Documents

X. Check Currency of Relevant Construction Project Documents and Amendments

X. Select Tender Documents

X. Draft Tender Preparation Document

X. Select Appropriate Contracts

X. Record Risks Identified

X. Use Costing Software Program

X. Prepare Tender Submission Draft

X. Check Accuracy of Information Collated for Tender Preparation

X. Complete Relevant Tender Documentation for Tender Submission

X. Prepare Client Acceptance Forms

X. Prepare Amendments and Conditions to the Tender or Contract

X. Attach Necessary Documents to the Tender Submission

X. Evaluate Completed Tender Documentation

X. Complete Appropriate Client Contract

X. Submit Tender Documentation for Endorsement

X. You have saved and submitted the following evidence:

X. This completed workbook

X. Assessment Workbook Cover Sheet signed and scanned

X. You have saved and submitted the following evidence:

X. Workplace Assessment Task 1

X. Copies of the construction project documents you sourced from the client organisation

X. Your email correspondence with the client organisation, which serves as evidence of sourcing the relevant construction project documents

- X. Workplace Assessment Task 2
 - X. Copies of the relevant construction project documents you reviewed and checked
 - X. Email confirming the currency of all project documents
- X. Workplace Assessment Task 4
 - X. Tender Preparation Document you drafted
 - X. Project plans, specifications, and project tender documentation you used as basis in drafting the Tender Preparation Document
- X. Workplace Assessment Task 6
 - X. Copy of the record of risks you identified during your evaluation.
 - X. Contracts used as reference in identifying and recording risks
 - X. Tender documents used as reference in identifying and recording risks
- X. Workplace Assessment Task 7
 - X. Bill of Quantities created
 - X. Construction project plans and specifications used as basis in creating the Bill of Quantities
- X. Workplace Assessment Task 8
 - X. Tender Submission Draft you prepared
 - X. Relevant documents you used as reference in preparing the Tender Submission Draft including, but not limited to:
 - X. Tender Preparation Document in Task 4
 - X. Record of risks in Task 6
 - X. Relevant plans, specifications, and project tender documentation
- X. Workplace Assessment Task 10
 - X. Completed tender documentation
 - X. Organisational documents containing the organisation's processes and procedures and other details of the organisation's profile you used as basis in completing tender documentation
 - X. Project plans, specifications, and other project documentation you used as basis in completing tender documentation
- X. Workplace Assessment Task 11
 - X. Client Acceptance Forms
- X. Workplace Assessment Task 12
 - X. Amendments and Conditions to the Tender/Contract
- X. Workplace Assessment Task 13
 - X. Copy of the completed tender submission (i.e. your Tender Submission Draft attached with the necessary documents indicated).

X. Workplace Assessment Task 14

X. Tender Submission Evaluation Checklist you completed

X. Completed tender documentation you evaluated

X. Workplace Assessment Task 15

X. Completed Client Contract

X. Workplace Assessment Task 16

S X. ubmitted tender documentation

X. Copy of the completed client contract you submitted

X. Your email correspondence with the client organisation, which serves as evidence that the tender documentation has been provided

IMPORTANT:

You must achieve a satisfactory result in ALL assessment tasks to be deemed COMPETENT for the unit/s relevant to this workbook.

To be deemed competent in the unit/s of competency relevant to this workbook, you must successfully complete all the requirements listed above according to the prescribed benchmarks provided to the assessor.

TO THE ASSESSOR

When you have completed assessing the assessment workbook, review the candidate's submission against the checklist below:

- ☐ **The candidate has completed all the Knowledge Assessments Questions.**
- ☐ **The candidate has completed the Practical Assessments in this workbook**
 - ☐ Practical Assignment
 - ☐ Appropriate costing software programs
 - ☐ The organisation's costing, tendering, and contracting system
 - ☐ Workplace Assessment
 - ☐ Source Relevant Construction Project Documents
 - ☐ Check Currency of Relevant Construction Project Documents and Amendments
 - ☐ Select Tender Documents
 - ☐ Draft Tender Preparation Document
 - ☐ Select Appropriate Contracts
 - ☐ Record Risks Identified
 - ☐ Use Costing Software Program
 - ☐ Prepare Tender Submission Draft
 - ☐ Check Accuracy of Information Collated for Tender Preparation
 - ☐ Complete Relevant Tender Documentation for Tender Submission
 - ☐ Prepare Client Acceptance Forms
 - ☐ Prepare Amendments and Conditions to the Tender or Contract
 - ☐ Attach Necessary Documents to the Tender Submission
 - ☐ Evaluate Completed Tender Documentation
 - ☐ Complete Appropriate Client Contract
 - ☐ Submit Tender Documentation for Endorsement
- ☐ **The candidate has saved and submitted the following evidence:**
 - ☐ This completed workbook
 - ☐ Assessment Workbook Cover Sheet signed and scanned
- ☐ **The candidate has saved and submitted the following evidence:**
 - ☐ Workplace Assessment Task 1
 - ☐ Copies of the construction project documents they sourced from the client organisation
 - ☐ Their email correspondence with the client organisation, which serves as evidence of sourcing the relevant construction project documents

- ☐ Workplace Assessment Task 2
 - ☐ Copies of the relevant construction project documents they reviewed and checked
 - ☐ Email confirming the currency of all project documents
- ☐ Workplace Assessment Task 4
 - ☐ Tender Preparation Document they drafted
 - ☐ Project plans, specifications, and project tender documentation they used as basis in drafting the Tender Preparation Document
- ☐ Workplace Assessment Task 6
 - ☐ Copy of the record of risks they identified during your evaluation.
 - ☐ Contracts used as reference in identifying and recording risks
 - ☐ Tender documents used as reference in identifying and recording risks
- ☐ Workplace Assessment Task 7
 - ☐ Bill of Quantities created
 - ☐ Construction project plans and specifications used as basis in creating the Bill of Quantities
- ☐ Workplace Assessment Task 8
 - ☐ Tender Submission Draft they prepared
 - ☐ Relevant documents they used as reference in preparing the Tender Submission Draft including, but not limited to:
 - ☐ Tender Preparation Document in Task 4
 - ☐ Record of risks in Task 6
 - ☐ Relevant plans, specifications, and project tender documentation
- ☐ Workplace Assessment Task 10
 - ☐ Completed tender documentation
 - ☐ Organisational documents containing the organisation's processes and procedures and other details of the organisation's profile they used as basis in completing tender documentation
 - ☐ Project plans, specifications, and other project documentation they used as basis in completing tender documentation
- ☐ Workplace Assessment Task 11
 - ☐ Client Acceptance Forms
- ☐ Workplace Assessment Task 12
 - ☐ Amendments and Conditions to the Tender/Contract
- ☐ Workplace Assessment Task 13
 - ☐ Copy of the completed tender submission (i.e. their Tender Submission Draft attached with the necessary documents indicated).

- ☐ Workplace Assessment Task 14
 - ☐ Tender Submission Evaluation Checklist they completed
 - ☐ Completed tender documentation they evaluated
- ☐ Workplace Assessment Task 15
 - ☐ Completed Client Contract
- ☐ Workplace Assessment Task 16
 - ☐ Submitted tender documentation
 - ☐ Copy of the completed client contract they submitted
 - ☐ Their email correspondence with the client organisation, which serves as evidence that the tender documentation has been provided

IMPORTANT:

The candidate must achieve a satisfactory result in ALL assessment tasks to be deemed COMPETENT for the unit/s relevant to this workbook.

To be deemed competent in the unit/s of competency relevant to this workbook, the candidate must successfully complete all the requirements listed above according to the prescribed benchmarks.

Record of Assessment (Assessor's Use Only)

RECORD OF ASSESSMENT	
Candidate's Name	
RTO Name	
RTO Contact Number	
RTO Email Address	
Assessor's Name	
Unit of Competency	CPCCBC4013 - Prepare and evaluate tender documentation (Release 1.0)

Knowledge Assessment	S	NYS
Question 1	☐	☐
Question 2	☐	☐
Question 3	☐	☐
Question 4	☐	☐
Question 5	☐	☐
Question 6	☐	☐
Question 7	☐	☐
Question 8	☐	☐
Question 9	☐	☐
Question 10	☐	☐
Question 11	☐	☐
Question 12	☐	☐

Practical Assessment		
Practical Assignment	S	NYS
Task 1	o	o
Task 2	o	o

Workplace Assessment – Residential Project	S	NYS
Task 1	o	o
Task 2	o	o
Task 3	o	o
Task 4	o	o
Task 5	o	o
Task 6	o	o
Task 7	o	o
Task 8	o	o
Task 9	o	o
Task 10	o	o
Task 11	o	o
Task 12	o	o
Task 13	o	o
Task 14	o	o
Task 15	o	o
Task 16	o	o

Workplace Assessment – Commercial Project	S	NYS
Task 1	o	o
Task 2	o	o
Task 3	o	o
Task 4	o	o
Task 5	o	o
Task 6	o	o
Task 7	o	o
Task 8	o	o
Task 9	o	o
Task 10	o	o
Task 11	o	o
Task 12	o	o
Task 13	o	o
Task 14	o	o
Task 15	o	o
Task 16	o	o

Rules of Evidence	S	NYS
All knowledge and skills evidence submissions are valid	o	o
All knowledge and skills evidence submissions are authentic	o	o
All knowledge and skills evidence submissions are sufficient	o	o
All knowledge and skills evidence submissions are current	o	o

Signature Authentication Checklist

This checklist will guide you in authenticating the signatures provided by the candidate in their assessment workbook and evidence submissions.

Read each checklist item and tick the box only if you confirm that the item is a true and accurate reflection of the signature authentication you have conducted.

Checklist	Completed
I have checked the signature provided by the candidate in the Assessment Workbook Cover Sheet against the signature they provided to the Training Provider.	☐
I confirm the signature provided by the candidate in the Assessment Workbook Cover Sheet matches the signature they provided to the Training Provider.	☐
I confirm ALL signatures provided by the candidate in their evidence submissions match with the signature they provided to the Training Provider.	☐

Third-Party Verification Log

Instructions for the Assessor:

You are required to contact all third-party personnel involved in the candidate's assessment to verify the candidate's performance and evidence submissions and to confirm with them whether the candidate's evidence submissions are true and accurate.

Complete this Third-Party Verification Log to document your completion of this process. When completing this log, provide all of the following required information for each third-party personnel:

- Name of third-party personnel contacted
- Relevant qualifications and/or experience of Third-party personnel contacted
- Role in the candidate's assessment (e.g. workplace supervisor, observer, or candidate)
- Contact details (phone number or email address)
- Date contacted

You must also confirm that third-party personnel have verified the candidate's evidence submissions are true and accurate.

Contact No.1

Name and job title of Third-party Contacted			
Relevant Qualifications/experience of Third-party			
Role in the Candidate's Assessment	Contact Details (Phone number or email address)	Date contacted	Third-Party verifies evidence submissions of the candidate are true and accurate?
			Yes ☐ No ☐ Assessor's Notes

Contact No.2

Name and job title of Third-party Contacted			
Relevant Qualifications/experience of Third-party			
Role in the Candidate's Assessment	Contact Details (Phone number or email address)	Date contacted	Third-Party verifies evidence submissions of the candidate are true and accurate?
			Yes ☐ No ☐ Assessor's Notes

Contact No.3

Name and job title of Third-party Contacted			
Relevant Qualifications/experience of Third-party			
Role in the Candidate's Assessment	Contact Details (Phone number or email address)	Date contacted	Third-Party verifies evidence submissions of the candidate are true and accurate?
			Yes ☐ No ☐ Assessor's Notes

Assessor Declaration	
I declare that the information recorded in this <i>Third-Party Verification Log</i> is true and accurate.	
Assessor's name	Assessor's signature
Date signed	

End of Record of Assessment (For the Assessor's Use Only)