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## Overview

This standard is relevant to archaeologists responsible for the development of projects on behalf of clients and the agreement of contracts to undertake the project. This function is performed both by internal project managers developing a project on behalf of their own organisation and by external consultants who are likely to be working for non-archaeological organisations. This Unit is about the co-ordination of the tendering process.

The tendering process involves agreeing the procurement procedures with the client, drawing up a tender list (where this is applicable), obtaining tenders and advising on the selection of tenderers. The Unit is applicable for tenders for works, for supplies and for services (which can include professional services).

The standard is specifically concerned with open competitive tendering and single negotiation, however, other standard methods of procurement may be used.

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Performance  
criteria

*You must be able to:*

**Agree a procurement procedure**

- P1 Identify and agree feasible and realistic procurement objectives and options
- P2 Identify and evaluate a range of procurement methods capable of meeting project key objectives against appropriate criteria
- P3 Select, recommend and agree the most effective procurement method with the client and other interested parties
- P4 Ensure that the agreed procurement method meets client constraints and relevant legal and statutory requirements
- P5 Agree and confirming the procurement method selected and appropriate implementation procedures

**Evaluate and select potential suppliers**

- P6 Identify potential tenderers and provide preliminary tender information in accordance with agreed procurement procedures and statutory requirements
- P7 Identify and invite interested tenderers who are potentially capable of meeting the contract specification to provide relevant background information to substantiate their capabilities
- P8 Devise and agree relevant and valid criteria for weighting and performance rating potential tenderers in order to select a shortlist
- P9 Offer the client additional relevant and objective information about potential tenderers to assist their selection
- P10 Ensure that the number of tenders to be invited is appropriate to the contract size and value and recommend and agree the list with the client and other interested parties
- P11 Promptly contact potentially suitable tenderers and confirm their willingness to bid
- P12 Add additional contractors who meet minimum criteria to the list in cases where potential tenderers decline an invitation

**Obtain tenders**

- P13 Ensure that tender enquiry documentation complies with statutory

### Co-ordinate the procurement process

regulations, codes of practice and organisational policy and contains complete and accurate descriptions of the technical requirements, contract terms and conditions and procedures for submission

- P14 Ensure that tender enquiry documents are issued to all tenderers on the agreed list in accordance with agreed procedures and timetables
- P15 Acknowledge queries from tenderers promptly and provide additional clear and accurate information where requested
- P16 Investigate comments from tenderers which indicate problems with clarity of documentation, technical feasibility or tender period and make appropriate amendments to the documentation
- P17 Communicate additional information, clarification and amendments to all tenderers promptly and fairly
- P18 Record feedback and queries from tenderers accurately and advise client and other consultants of necessary amendments and tender withdrawals

#### **Select suppliers**

- P19 Verify that returned tenders are stored securely and opened on the due date in accordance with the prescribed organisational procedures and legal requirements
- P20 Reject all tenders returned after the due date which have not been granted extensions
- P21 Select for evaluation tenders which are estimated, costed and calculated accurately, comply with specified requirements and meet financial criteria
- P22 Clarify with the tenderer any discrepancies, omissions and errors in tenders selected for evaluation
- P23 Evaluate selected tenders accurately against the agreed criteria and select, recommend and agree the tender which best meets the criteria with interested parties
- P24 Confirm clients' and tenderers' ability to meet their obligations under the proposed form of contract
- P25 Negotiate and agree variations with selected tenderer where required and involve others as appropriate
- P26 Confirm the client's acceptance of the successful tender and inform unsuccessful tenderers and interested parties of the outcome of the selection process
- P27 Suitably modify and repeat the tendering process where insufficient tenders are obtained to demonstrate adequate competition

**Knowledge and understanding**

*You need to know and understand:*

- K1 How to identify and agree procurement objectives and options
- K2 How to identify and evaluate a range of procurement methods
- K3 How to select the most effective procurement method
- K4 Normal types and methods of procurement
- K5 How to evaluate what methods of procurement best suit different types of project, taking account of complexity, value and timescale for completion
- K6 Client requirements and preferences for procurement routes
- K7 The costs, risks and benefits of alternative methods of procurement
- K8 Standard procurement procedures applying to different methods of procurement
- K9 Legal and regulatory requirements applying to particular categories of client and project type (including EU legislation)
- K10 The archaeologist's duties and responsibilities as they apply to different forms of procurement
- K11 Legal and ethical issues applying to the conduct of the procurement process
- K12 How to identify potential tenderers
- K13 How to devise criteria for comparing potential tenderers
- K14 The types of tender and their applicability to different forms of procurement
- K15 The sources of information on potential tenderers
- K16 Legal and statutory controls on tendering procedures
- K17 Methods of evaluating capability and performance of potential tenderers
- K18 Standard procedures for main types of tender arrangement
- K19 Relevant criteria for short listing potential tenderers
- K20 The archaeologist's duties and responsibilities for advising on and co-ordinating tendering arrangements
- K21 Legal and statutory controls on tendering procedures

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### Co-ordinate the procurement process

K22 Standard procedures for documenting and conducting main types of tender

K23 The archaeologist's duties and responsibilities for advising on and co-ordinating tendering arrangements

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**Developed by**

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**Indicative review  
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**Validity**

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**Status**

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**Originating  
organisation**

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**Original URN**

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**Relevant  
occupations**

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**Suite**

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**Key words**