

AHCBUS504A Prepare estimates, quotes and tenders

ASSESSMENT TASKS

*Student Instructions*

1. Complete all tasks and activities using available class time, class notes and other resources.
2. Work may be submitted in either hard or soft copy.
3. Every assessment submitted requires a complete cover page noting the authenticity declaration, your student number and task name and number. Assessments may not be received without a complete cover page. If submitting via email you still require a cover page as first page of your assessment task.
4. Work to the timelines set by your teacher. Late submission may result in loss of marks. Teachers may not remind you of due dates, you are responsible for submitting on time.
5. Each assignment needs to be passed and will contribute to the overall assessment grade for this unit.
6. Practical or observation based assessment tasks require your presence and participation; you are responsible for tracking your tasks and ensuring they are achieved.

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| **AHCBUS504A Prepare estimates, quotes and tenders**ASSESSMENT TASKS |
| **Name** |  |
| **Student ID No** |  |
| **Class Code** |  |
| **Assessment Task** (Name & No. as per handout) |  |
| **Facilitator Name** |  |
| **Due Date** |  | **Submitted Date** |  |

***In submitting this assignment for assessment, the student acknowledges that:***

* ***References are included, where applicable***
* ***A backup copy of the assignment has been retained by the student***
* ***The Chisholm Institute policy on plagiarism has not been breached
(that is, the contents of the assignment are all the work of the student, including in-class small group work and work in the student’s practice environment).***

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| ***Department Use Only:***  ***ASSESSMENT TASK DECISION*** ***Comments:*** |
| ***Task Outcome:*** **🞏** fail <50% **🞏** pass 50-59% **🞏** credit 60-69**% 🞏** distinction 70-79**%** **🞏** high distinction 80-100% |
| *Entering a grade and saving associated evidence in Chisholm Institute’s files provides verification by the assessor.*Assessor Name: Date: / / |
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AHCBUS504A Prepare estimates, quotes and tenders

ASSESSMENT TASKS

This unit covers the processes involved with preparation of estimates, quote and tenders and defines the standard required to: research the details of the quoted service and clarify with the client; identify requirements for estimate, quote or tender including format, specifications and deadline for submission; identify and cost the resources and services required to fulfil the tender and check for availability; investigate options for supplies, services, contractors and consultants with current pricing structures and availability; develop a work schedule with timelines and expenditure; consider potential problems and risks and develop contingency plans; develop detailed costing sheets with the final quoted cost, including an estimated margin for risk; submit the completed tender to the client with supporting information including details of organisations previous work and client feedback; seek feedback from the client to ensure information supplied is sufficient.

*Successful completion of four tasks is required for this unit. The assessment task requires students to produce assessments around a tender or quote. You can source your own that is relevant to your industry or chose from those provided.*

1. ***Preliminary Planning Actions***

Prepare a plan for your tender submission. This document will be something that guides the process and assist you to determine the steps you need to take and the actions to complete in order. This plan will include a brainstorm of things you need to do and it will identify the requirements for the quote or tender. You will need to determine documentation and information you need to collect, suppliers that need to be contacted. What legislation do you need to comply with and how will this be achieved? What are the OHS & E requirements, how will you fulfil these? What about management policies relating to labour hire? What items aren’t asked in tender documentation that you would like to include? Who should and shouldn’t you ask questions of, what are the business ethics relating to confidentiality and the tendering process and how will you manage these? Consider potential problems and risks and develop contingency plans.

List the actions you need to take, when you need to complete them by and in the appropriate order.

An important component of this task is the site visit. You are to document the site visit process. After a review of the tender requirements document what key points of information you will be looking to determine or conform from your site visit. What notes did you take during the site visit and finally what actions or queries arose as a result of the site visit.

1. ***Costing Estimates Report***

Prepare a series of spreadsheets and accompanying documents to demonstrate the costing out process. At the minimum this will require:

* A list of resources required for the tender, including all the details of the resources – to be done in excel
* Suppliers for resources and their unit costs per item, any other charges, delivery, what is their availability?
* Details of labour estimates for each different tasks – document separate from the spreadsheet how labour estimates were determined
* Use spreadsheet to produce calculations that show total and unit costs changes when labour and material rates change. This will assist you in determine an appropriate contingency factor to include in your costing.
1. **Works Scheduling**

Prepare a works schedule that details what actions will occur, by who, when. This may include approval points by the client and needs to achieve the clients expected date for the completion of the works. This document should be used to plan as well as document progress.

1. **Tender submission**

Compile all the information required for the tender into one tender submission document. This document may have appendices that allow the tenderer to meet all the criteria. It must address all the criteria within the tender or quote schedule or scope. If not requested the tenderer must supply a brief business profile that highlights the businesses strengths and points of difference along with how the tenderer will address and comply with legislative and OHS&E issues.