

Routes to success

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Mark Loveland outlines the skills you have to demonstrate for the Procurement and tendering competency

Procurement and tendering is a core Level 3 competency on both the Quantity Surveying and Project Management APC pathways. Project structure, risk allocation, contractual relationships and the role of tender processes in establishing a contract price are all covered.

As a candidate, you will be expected to understand the various procurement routes available on a construction project, and how the tender process works.

Many candidates struggle to demonstrate the breadth of experience required. In this article, therefore, we look at what is expected at each competency level, how you should prepare your summary of experience, what further reading you should do and the background knowledge you need to have.

Please be aware that procurement and tendering are 2 separate processes that will be dealt with individually in the assessment.

For procurement, the assessors will be expecting you to demonstrate awareness of all the main routes. These include:

- traditional procurement;
- design and build;
- management forms;
- partnering;
- serial and term contracts.

For tendering, we would expect you to demonstrate awareness of different processes, such as:

- single-stage tendering: in which multiple contractors tender through one single tender process;
- 2-stage tendering: where a first stage is introduced to identify a preferred contractor(s);
- negotiated tendering: where the contract is negotiated with a preferred contractor or contractors.

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Experience summary

For Level 1, you should be aiming to show the assessors how you have obtained and consolidated your understanding of all aspects of the competency. A common error is that candidates state their understanding of a topic without providing any evidence to support it.

Assessors will be expecting to see references to courses and seminars you have attended, as well as to wider reading around the subject. You should relate your Level 1 competency to your CPD record as much as possible, and you should not be afraid to make cross-references between the two.

At Level 2, the assessors will be looking for examples that demonstrate your practical experience of undertaking procurement and tendering tasks. Try to identify particular projects in your text, and be specific regarding the role and work undertaken. You should aim for 2 or 3 project examples to demonstrate your competence. Make sure the examples you give relate to tasks you have undertaken, rather than those on which you have just assisted.

Assessors may focus on topics such as:

- the production of a procurement report;
- tasks undertaken under different procurement routes;
- compiling a tender list;
- the pre-qualification of contractors;
- the management of the tender process;
- tender opening procedures;
- analysis and evaluation of tenders;
- how to deal with errors and qualifications;
- tender reports.

For Level 3, you will need to provide examples of where you have given advice to a client or project team. Again, you should choose 2 or 3 good examples, referring to the project and the specific advice given.

Candidates regularly struggle at Level 3 when the examples they present are too simplistic. At Level 3, you need to understand what not to do in practice, as well as advising what should be done.

Try to avoid examples that cannot be supported with a full explanation. Statements such as:

'I advised the client to adopt a 2-stage procurement route'

will need a follow-up discussion of why this particular course was chosen in this instance. You will do well to elaborate in your explanations, as in the following example:

'At the central London office project, I recommended that the client adopt a 2-stage approach. Having reviewed both single-stage and 2-stage approaches, I identified that the potential to start on site earlier using the latter route would be better overall.

'Although using a single-stage approach may have resulted in a more competitive tender,

I understood from discussions with the client that an earlier finish was more important than the risk of a higher price.'

Giving advice at Level 3 is only possible if you have the full breadth of understanding required at Level 1 to explore all options and appreciate what constitutes good or bad advice in a given situation.

You should be able to explain your thought process and what options or solutions were considered ? and which were discounted ? before arriving at the advice you gave

Question time

At the final assessment, you will be asked to use your summary of experience as the basis for your answers to most questions. It is essential that you have listed a range of project-specific examples. In short, the better the examples you provide, the more specific to your experience the questions will be.

Level 1 questions require you to demonstrate that you have attained the fundamental knowledge for the competency. For procurement, expect to be asked about how the various routes work in practice. This would include:

- contractual relationships;
- roles and responsibilities of the parties to the contract;
- variance between time, cost and quality aspects;
- risk allocation.

You should be able to explain the tendering process from start to finish, including:

- the key documentation and how this varies from one route to another;
- how each of the tendering tasks would be undertaken;
- your role;
- how to analyse tenders and deal with errors.

Questioning at Level 2 will focus more on the examples you have given in your summary of experience, and the assessors will be looking for you to be able to explain what you did and why.

You need to prove that you understand what is required to undertake tasks correctly. Your responses should relate to specific project examples and show you have followed best practice.

When questioning moves up to Level 3, again, provide examples of having given advice on procurement and tendering. Assessors will be looking to understand why you provided the advice you did and how you arrived at your conclusions. This may include topics such as advice given regarding selection of a procurement route or contractor choice for a tender.

You should be able to explain your thought process and what options or solutions were

considered ? and which were discounted ? before arriving at the advice you gave, building on the examples given in your summary of experience.

In demonstrating how you have achieved the different levels of the competency, you must also refer to any relevant guidance and best practice documents.

You should have consulted the pathway guide and Black Book if you have not already done so; the latter is a suite of guidance notes that define good technical standards for quantity surveyors and construction professionals, and is essential for those working towards the APC.

Parting thoughts

You should make sure you have a balance of experience between procurement and tendering for Level 1; refer to specific project examples at Levels 2 and 3; and also be able to explain your thought process at Level 3, including what was discounted before arriving at the advice given.

Neither should you forget to read the relevant guidance notes and [Black Book](#) in relation to the competency.

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Further information

- Related competencies include [Procurement and tendering](#)
- This feature is taken from the RICS *Construction journal* (April/May 2017)