

# Learning Assessment Guide

## Unit Standard 20919 – Version 1

### Request and receive offers in a public sector procurement process

#### Level 6 – 8 Credits

Assessment Summary			
Learner to complete			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
Assessor to complete			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

## Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

This Learning Assessment Guide is made up of:

- Task sheets for you to complete.
- A Manager Verification Form.
- The summary Assessment Guide that the assessor will use to assess your competence.

The assessment tasks are designed to demonstrate that you can:

- develop a request for offers in a public sector procurement process
- request and receive offers.

Please review the unit standard before starting this assessment. The special notes section contains useful definitions and references to resources.

What do I do now?

- Read through all of the information contained in this Learning Assessment Guide.
- Familiarise yourself with each assessment task and the instructions.
- Contact your assessor if necessary to clarify anything you are unsure of.
- Complete the assessment tasks as agreed on with your assessor.
- Contact your assessor when you have finished the assessment tasks.
- Make sure you keep a copy of your completed assessment task if you are mailing the original copy to your assessor.

KIA KAHA and GOOD LUCK

## Assessment Task One – Elements 1 and 2

### Introduction

This integrated assessment task is designed to assess your ability to:

- develop a request for offers in a public sector procurement process
- request and receive offers.

### Task Instructions

You are required to present evidence that you have successfully undertaken the above in your workplace during the last two years or so. You must have been solely or largely responsible for these activities.

Please provide evidence relating to **two** different requests for offers.

Suitable evidence could include materials such as:

- Offer documents
- Procurement / Project plans
- Supply plans
- Project structure details
- Approvals documentation / delegations
- Business cases
- Project minutes
- File notes
- Procurement policy
- User sign off requirements / specifications
- Procurement procedures
- Category management plans
- Risk plans
- Procurement strategy
- Contract templates
- Communication plans

This evidence should be presented in a folder with clearly marked sections and explanatory notes where required. If documents cannot be copied, your assessor may be able to view them at your workplace.

The folder should have a cover sheet documenting the contents of the folder and be certified by your manager as being largely or solely your own work. A sample cover sheet follows.

Your assessor will review your evidence, discuss it with you and ask supplementary questions. Be prepared to provide explanations and analysis.

The following checklist will be used to record the assessment. Please ensure that you provide evidence for all elements and criteria. If this is not possible, discuss this with your assessor before your review session.

## Unit Standard 20919 V1 Evidence Cover Sheet

---

Learner:

Date:

Manager Name:

Signature:

---

\_\_\_\_\_ (name of learner) is currently being assessed toward Unit Standard 20919 v1 Request and receive offers in a public sector procurement process. S/he has been asked to show you any documentation submitted for assessment.

Your knowledge of the learner and his/her work is sought to confirm that the following documents are largely or solely the work of the learner (learner to list below).

Please also confirm that the learner completed the above in accordance with relevant organisational standards,

**Unit Standard 20919 V1 Assessor Checklist**

Learner:

Date:

Assessor:

**1. Develop a request for offers in a public sector procurement process.**  
(2 requests for offers required).

Criteria	RFO 1 Demonstrated?	RFO 2 Demonstrated?
Request for offers and contractual conditions is: <ul style="list-style-type: none"><li>suitable for the procurement activity</li><li>clarified with clients / providers and /or experts as necessary.</li></ul>	Yes / No	Yes / No
Request for offers is developed : <ul style="list-style-type: none"><li>in accordance with procurement plan</li><li>and meets legal and probity requirements.</li></ul>	Yes / No	Yes / No
Records documenting the request for seeking, processing and closing of offers are kept in accordance with: <ul style="list-style-type: none"><li>organisational policies and procedures</li><li>and legal requirements.</li></ul>	Yes / No	Yes / No

Comments / Examples:

## 2. Request and receive offers.

Criteria	RFO 1 Demonstrated?	RFO 2 Demonstrated?
Strategies for briefing potential bidders meet organisational policies and procedures.	Yes / No	Yes / No
Request for clarification and receipt of offers is in accordance with: <ul style="list-style-type: none"><li>▪ organisational policies and procedures</li><li>▪ and government guidelines.</li></ul>	Yes / No	Yes / No

Comments / Examples:

## Assessment Task Two – Elements 1 and 2

### Introduction

This integrated assessment task is designed to assess your ability to:

- develop a request for offers in a public sector procurement process
- request and receive offers.

### Task Instructions

Ask your manager to complete the following Verification Form. Please ensure that you give them a copy of the unit standard.

You will need to explain :

- the assessment process if they are unfamiliar with it,
- that the assessor may contact them to discuss their responses.

Return the form to the assessor once it has been completed.

**Unit Standard 20919 V1 Manager Verification Form**

Learner:

Date:

Manager Name:

Signature:

Contact Details :

\_\_\_\_\_ (name of learner) is currently being assessed toward Unit Standard 20919 v1, Request and receive offers in a public sector procurement process. Your knowledge of the work of the learner is sought to confirm that they are able to undertake the following:

**2. Develop a request for offers in a public sector procurement process.**  
(2 requests for offers required).

Criteria	RFO 1 Demonstrated?	RFO 2 Demonstrated?
Request for offers and contractual conditions is: <ul style="list-style-type: none"> <li>▪ suitable for the procurement activity</li> <li>▪ clarified with clients / providers and /or experts as necessary.</li> </ul>	Yes / No	Yes / No
Request for offers is developed : <ul style="list-style-type: none"> <li>▪ in accordance with procurement plan</li> <li>▪ and meets legal and probity requirements.</li> </ul>	Yes / No	Yes / No
Records documenting the request for seeking, processing and closing of offers are kept in accordance with: <ul style="list-style-type: none"> <li>▪ organisational policies and procedures</li> <li>▪ and legal requirements.</li> </ul>	Yes / No	Yes / No

Comments / Examples:

## 2. Request and receive offers.

Criteria	RFO 1 Demonstrated?	RFO 2 Demonstrated?
Strategies for briefing potential bidders meet organisational policies and procedures.	Yes / No	Yes / No
Request for clarification and receipt of offers is in accordance with: <ul style="list-style-type: none"><li>organisational policies and procedures</li><li>and government guidelines.</li></ul>	Yes / No	Yes / No

Comments / Examples:

Thank you for your assistance.

## Assessment Guide

The following guide will be used to assess your competence with unit standard 20919 version 1: Request and receive offers in a public sector procurement process.

<b>Task / Element</b>	<b>Evidence required</b>	<b>Judgment</b>
<p><i>Task 1 / Elements 1 &amp; 2</i></p> <p>This task requires learners to demonstrate the following to the assessor (in their own workplace).</p> <ol style="list-style-type: none"> <li>1. Develop a request for offers in a public sector procurement process.</li> <li>2. Request and receive offers.</li> </ol>	<p>Documentary evidence, discussion and questioning results in the completion of all parts of the Assessor Checklist.</p> <p>Two Requests for offers must be described.</p> <p>Discussion and responses should be recorded by the assessor.</p> <p>Evidence Cover Sheet signed by Manager.</p>	<p>Completed Assessor Checklist (for 2 requests for offers) demonstrates the ability of the learner to :</p> <ol style="list-style-type: none"> <li>1. Develop a request for offers in a public sector procurement process.</li> <li>2. Request and receive offers.</li> </ol> <p>Evidence Cover Sheet confirms the above completed in accordance with relevant organisational requirements.</p>
<p><i>Task 2 / Elements 1 &amp; 2</i></p> <p>This task requires the learner to arrange for their Manager to complete the Manager Verification form, confirming their ability to :</p> <ol style="list-style-type: none"> <li>1. Develop a request for offers in a public sector procurement process.</li> <li>2. Request and receive offers.</li> </ol>	<p>Fully completed Manager Verification Form.</p>	<p>The completed Manager Verification form confirms the ability of the learner to:</p> <ol style="list-style-type: none"> <li>1. Develop a request for offers in a public sector procurement process.</li> <li>2. Request and receive offers.</li> </ol>