

Learning Assessment Guide

Unit Standard 20920 – Version 1

Award public sector procurement contracts

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:

- recommend the awarding of a public sector procurement contract
- formalise contractual arrangements.

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:

- recommend the awarding of a public sector procurement contract
- formalise contractual arrangements.

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.

You are required to present evidence for and discuss **two** separate public sector procurement contracts.

Suitable evidence could include:

- Project charters
- Procurement / Project plans
- Project minutes
- Project structure details
- Approvals documentation / delegations
- File Notes
- Contracts
- Procurement strategy
- Tender evaluation reports

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 20920 V1 Evidence Cover Sheet

Learner:

Date:

Manager Name:

Signature:

_____ (name of learner) is currently being assessed toward Unit Standard 20920 v1, Award public sector procurement contracts. 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).

Unit Standard 20920 V1 Assessor Checklist

Learner:

Date:

Assessor:

1. Recommend the awarding of a public sector contract.
(2 contracts required).

Criteria	Contract 1 Demonstrated?	Contract 2 Demonstrated?
The offer selected is justified and documented against selection criteria in accordance with organisational policies and procedures.	Yes / No	Yes / No
Records to document and justify evaluation of offers meet internal and external audit trail requirements.	Yes / No	Yes / No
Approvals are obtained for the preferred offer in accordance with organisational policies and procedures.	Yes / No	Yes / No
Successful and unsuccessful bidders are informed or debriefed in accordance with organisational policies and procedures.	Yes / No	Yes / No

Comments / Examples

2. Formalise contractual arrangements.

(2 contracts required).

Criteria	Contract 1 Demonstrated?	Contract 2 Demonstrated?
Negotiations to agree contractual arrangements are undertaken in accordance with organisational policies and procedures and government guidelines.	Yes / No	Yes / No
Contract captures and addresses identified risks, the protection of both parties and provides the basis for due performance.	Yes / No	Yes / No
Approvals are sought and obtained in accordance with organisational policies and procedures. This includes ensuring that appropriate delegations are in place for signing the contract.	Yes / No	Yes / No
No contractual commitments are made and contractors do not commence before the contract is signed.	Yes / No	Yes / No
Contract entered in to is valid and legally binding to both parties.	Yes / No	Yes / No
Advice on the contractual arrangements is provided to stakeholders in accordance with organisational policies and procedures.	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:

- recommend the awarding of a public sector procurement contract
- formalise contractual arrangements.

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 20920 V1 Manager Verification Form

Learner:

Date:

Manager Name:

Signature:

Contact Details :

_____ (name of learner) is currently being assessed toward Unit Standard 20920 v1 , Award public sector procurement contracts. Your knowledge of the work of the learner is sought to confirm that they are able to undertake the following.

1. Recommend the awarding of a public sector contract.
(2 contracts required).

Criteria	Contract 1 Demonstrated?	Contract 2 Demonstrated?
The offer selected is justified and documented against selection criteria in accordance with organisational policies and procedures.	Yes / No	Yes / No
Records to document and justify evaluation of offers meet internal and external audit trail requirements.	Yes / No	Yes / No
Approvals are obtained for the preferred offer in accordance with organisational policies and procedures.	Yes / No	Yes / No
Successful and unsuccessful bidders are informed or debriefed in accordance with organisational policies and procedures.	Yes / No	Yes / No

Comments / Examples

2. Formalise contractual arrangements.

(2 contracts required).

Criteria	Contract 1 Demonstrated?	Contract 2 Demonstrated?
Negotiations to agree contractual arrangements are undertaken in accordance with organisational policies and procedures and government guidelines.	Yes / No	Yes / No
Contract captures and addresses identified risks, the protection of both parties and provides the basis for due performance.	Yes / No	Yes / No
Approvals are sought and obtained in accordance with organisational policies and procedures. This includes ensuring that appropriate delegations are in place for signing the contract.	Yes / No	Yes / No
No contractual commitments are made and contractors do not commence before the contract is signed.	Yes / No	Yes / No
Contract entered in to is valid and legally binding to both parties.	Yes / No	Yes / No
Advice on the contractual arrangements is provided to stakeholders in accordance with organisational policies and procedures.	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 20920 V1: Plan procurement in the public sector.

Task / Element	Evidence required	Judgment	Checklist
<p><i>Task 1 / Elements 1 & 2</i></p> <p>This task requires learners to demonstrate the following in relation to two public sector procurement contracts.</p> <ol style="list-style-type: none"> 1. Recommend the awarding of a public sector procurement contract. 2. Formalise contractual arrangements. 	<p>Documentary evidence, discussion and questioning results in the completion of all parts the Assessor Checklist.</p> <p>Discussion and responses should recorded by the assessor.</p> <p>Evidence Cover Sheet signed by Manager.</p>	<p>Completed Assessor Checklist demonstrates the ability of the learner to:</p> <ol style="list-style-type: none"> 1. Recommend the awarding of a public sector procurement contract. 2. Formalise contractual arrangements 	<p>Yes / No</p> <p>Yes / No</p>
<p><i>Task 2 / Elements 1 & 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"> 1. Recommend the awarding of a public sector procurement contract. 2. Formalise contractual arrangements. 	<p>Fully completed Manager Verification Form.</p>	<p>The completed Manager Verification for confirms the ability of the learner to:</p> <ol style="list-style-type: none"> 1. Recommend the awarding of a public sector procurement contract. 2. Formalise contractual arrangements. 	<p>Yes / No</p> <p>Yes / No</p>