

Tender Checklist

No	Item	Description
A	Getting ready to tender – planning = preparedness	
A1	Do you have a capability statement?	Your capability statement is a statement that reflects your business' competencies, achievements, partnerships, alliances and accreditations. The capability statement is the vehicle to communicate your business' capability to potential business partners, customers, suppliers and other stakeholders.
A2	Do you understand what capacity you have for more work?	It is good to know whether you have room to take on more work and if you have the right number of people and capability to be able to tender for more work
A3	Have you registered on the relevant tender sites to make sure that you know do receive notice of upcoming tenders	There are several tender notification websites and it is good to find the right ones to register your business' interest and area of business.
A4	Once you receive your copy of a tender, have you registered your interest in order to make sure you are informed of any changes?	When you receive a tender that is of interest, it is important to make sure that you register in order to get any updates or changes.
A5	Do you understand all of the requirements and can you comply with all of the requirements?	What is important in the tender? Are there any gaps in what you can or cannot do?
A6	Are there any areas you do not understand	If you do not understand something, talk to the tender contact person.
A7	When does the tender have to be submitted?	What is the closing date? Late tenders may not be accepted. It is prudent to aim for submission 1 day earlier, that way you do have extra time in case putting the tender together takes longer than planned.
A8	Do you have all the information you need?	It is always useful to attend tender briefing sessions and/or site visits.
A9	Do you understand the scope of work?	Is the scope within the scope of what you company can provide? What is in scope? What is out of scope?
A10	Do you understand the pricing criteria?	What are the pricing criteria – are you expected to tender on a lump sum basis/ fixed or variable basis? What is included in the pricing? What is excluded in the pricing? Do you have enough information to complete the pricing for the tender?
A11	Are you able to complete	Can you complete the contract without needing to use

	the total scope in-house?	sub-contractors or partners? If not, make sure you allow enough time to get information from the related parties and to agree who does what. If you are in a consortium and the consortium has not been invited to tender, you will have to make sure that you get approval to tender as a consortium.
A12	Do you understand the tender evaluation criteria and how to comply with it?	Determine the criteria against which your tender will be evaluated and note any weighting placed on each of the criteria. These are important to pay attention to as the tender evaluation is done on the criteria.
A13	Is this a high value tender that will need its own strategy and planning?	For high value tenders you may wish to determine at an early stage if you can provide a competitive solution.
A14	Do you understand the contract terms and conditions?	Read the contract terms and conditions and make sure you can comply. If need be, source external advice.
A15	What is the tender submission format?	How many copies? Paper or electronic? Allow time to make print, copy and bind if hard copies are required.
A16	What tender forms need to be completed?	Are there any mandatory tender forms to be completed? These need to be completed otherwise your tender may not be included in the evaluation process.
B Preparing and completing your tender		
B1	Are you answering what is been asked of you?	Quality still beats quantity. Make sure that you cover what is required but do not over-provide information if there is not substance to what you are able to do. Your tenders must reflect your capability and capacity to complete the contract.
B2	Do you need to complete any tender schedules	If tenderers response schedules have been provided, use them.
B3	Are there any formatting or number requirements	Even where no formatting requirements are provided, it is professional to follow the same sequence as the tender documents.
B4	Have you answered all of the sections	Make a checklist from the tender documentation and tick off all of the requirements as you go. A checklist is also handy to use a planning tool to make sure you have enough time to be able to complete the tender and submit in time.
B5	Have you provided all documentation and schedules as requested?	Make sure you provide all of the documentation and schedules as required. Again useful to add to your checklist above to ensure it gets done.
B6	Can you accept the terms and conditions or do you need request changes?	If you request any changes, it is very useful to provide the reasoning for the change. A generic "cannot accept" will not work.
B7	Are there any industry standards or specifications required?	Are any supporting documents required? Are they attached? Think of areas such as health, safety and environment, people training and competencies, quality

		assurance etc.
B8	Have you shown in your response how you will meet the evaluation criteria?	Completing the evaluation criteria must be factual and actual and not just motherhood statements. Remember the criteria will determine your success.
B9	Have you completed the price or cost schedule for all items you are tendering?	Have you completed the costing/pricing information as requested? It is always a good idea to make sure that you clearly outline any pricing assumptions.
B10	Are you competitive?	How do you know you are competitive? Have you done your market research?
B11	Have you confirmed with your referees that they are willing to be a referee?	Carefully select referees. Also make sure that they are appropriate to the tender.
B12	Have there been any amendments?	Have you addressed any tender amendments?
B13	Is this an alternative/non-conforming tender?	If you do not submit a conforming tender together with an alternative/non-conforming tender, your tender may not be accepted in the first place. It is necessary to check with the tender contact person if non-conforming tenders will be accepted.
C	Tender Submission	
C1	All forms been signed as required?	The devil lies in the detail.
C2	Tender submission	Can the tender be faxed or emailed? What about hard copies?
C3	Tender reference	Make sure that the tender submission documentation, including envelopes, letters etc. have the tender reference, contact details etc. as set out in the tender documentation.