

Bid & Tender Compliance Readiness Checklist

A practical pre-submission review for construction and FM contractors

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1 Use this checklist before submission

Use this guide to review whether your bid response, supporting evidence and mobilisation approach are organised for buyer review. Mark the items that are ready, flag gaps early and assign a clear owner for each action.

This is a general resource prepared by Levantis Consulting. It does not replace project-specific tender review, legal advice, buyer instructions or the requirements stated in a particular contract.

1.1 1. Bid opportunity and buyer requirements

- ☐ The tender instructions, return format and submission deadline are recorded.
- ☐ The buyer's health, safety, quality, environmental and social-value questions are allocated to named response owners.
- ☐ Mandatory policies, certificates, competence records and declarations are identified before drafting begins.
- ☐ Any requirements that cannot be evidenced are recorded in an action tracker with a responsible person and completion date.

1.2 2. Company capability and controlled evidence

- ☐ Current company information, relevant policies and controlled document versions are ready for review.
- ☐ Professional competence, training, supervision and subcontractor-management evidence is available where requested.
- ☐ Health, safety, quality and environmental responsibilities are clear and consistent across the response.
- ☐ The response explains how evidence is maintained through delivery, not only at submission stage.

1.3 3. Risk, method and mobilisation planning

- ☐ Significant work activities, foreseeable hazards and principal controls are understood.
- ☐ The RAMS approach is proportionate to the proposed work, site conditions and client requirements.
- ☐ Permit, notification, inspection and briefing requirements are identified.
- ☐ Mobilisation actions cover induction, supervision, equipment, competence and document issue.

1.4 4. Supply chain and delivery control

- ☐ The process for selecting, briefing and monitoring subcontractors is explained clearly.
- ☐ Site diary, inspection, photograph, briefing and corrective-action records are planned.
- ☐ The approach to reporting incidents, near misses and emerging risks is documented.
- ☐ Evidence storage, version control and information access are defined for the project team.

1.5 5. Close-out and handover

- ☐ Quality, inspection and completion records are identified before work starts.
- ☐ Requirements for the Health and Safety File, O&M information or client handover pack are allocated.
- ☐ Lessons learned, close-out actions and retained records are included in the project plan.

1.6 A final submission check

Before submission, conduct a final read-through against the buyer's requirements. Confirm that the named evidence is current, the response tells one consistent story, and the proposed controls can be delivered in practice.

- ☐ Every mandatory question has a complete, buyer-specific response.
- ☐ Cross-referenced evidence is current, controlled and available to the people responsible for mobilisation.
- ☐ The proposed systems, controls and commitments are deliverable by the project team.
- ☐ The named response owner has completed the final submission review.

1.7 When a tender needs senior compliance input

Levantis provides founder-led bid and tender advisory for construction and FM contractors. Jamie Carraher, CMIOASH, MIIRSM, reviews the requirement, identifies evidence gaps and prepares controlled submission material that supports a clear, credible bid.

The work can focus on a defined tender deadline, a mobilisation requirement or a longer-term plan for strengthening the evidence your business needs to present.

For a founder-led review of a live bid, tender or mobilisation requirement, contact Jamie Carraher at Levantis Consulting.