



Tendering Preparation Checklist

Documentation	Have	Have but requires updating	Do not have
3 years audited or professionally prepared accounts			
Details of bank – name/address/ sort code/account number			
DUNS Number (Dun & Bradstreet) free to register (online at – www.dnb.co.uk/dandb-duns-number)			
Insurance certificates – Employers liability, public liability, Professional Indemnity			
Quality Policy			
Quality certification ISO9001:2008 (if held)			
Environmental policy			
Environmental certification ISO14001 (if held)			
Sustainability policy			
Supply chain information current suppliers/sub-contractors – names, locations,			
Corporate Organisation chart			
Divisional Organisation chart			
Key Employee information – CV's/ qualifications			
Organisations staff retention/turnover figures			
Health & Safety Policy			
CHAS certification (If registered)			
Health & Safety - Example Risk assessments/ method statements			
Equal opportunities policy/diversity policy			
Equal opportunities monitoring form			
Equalities information form staff handbook. Example recruitment advert advertising 'we are an equal opportunities employer'			
Investors in people certificate (If registered)			
Staff training/recruitment policy			
Training Matrix demonstrating internal staff training undertaken			
Business continuity/Disaster Recovery policy			
Corporate Social Responsibility Policy			
Anti-bribery and Anti-Corruption Policy			
Data Protection and Communications policy			
Social networking policy			
Customer Care Policy			
Complaints Policy			
Certification to governing bodies within industry – professional accreditations/memberships			
Client testimonials/references - similar to the work bidding for			
Case Studies of similar contracts			