

Tender Document Checklist

The documents and forms to prepare before you submit a bid

Tenders are often lost on missing paperwork, not price. Work through this list well before the closing date. Always check the tender document itself, because each buyer sets its own requirements.

Company and compliance documents

- ☐ **CIPC registration documents**
Registration certificate and, where requested, a recent company disclosure or CIPC report.
- ☐ **CSD summary report**
Central Supplier Database registration with your supplier number (MAAA number).
- ☐ **SARS tax compliance status (TCS) PIN or letter**
Must be valid on the closing date and must not expire before award.
- ☐ **Certified ID copies of all directors**
Check whether the buyer wants certified copies, and how recent the certification must be.
- ☐ **Valid B-BBEE certificate or sworn affidavit**
Needed to claim preference points.
- ☐ **COIDA letter of good standing**
Proof that your Compensation Fund account is up to date.
- ☐ **Proof of business address**
Municipal account, lease agreement, or a letter from the municipality or tribal authority.
- ☐ **Bank confirmation letter**
On the bank's letterhead, showing account holder, number and branch code.
- ☐ **CIDB registration and grading**
Construction tenders only. Your grade must match the value of the tender.
- ☐ **Professional registrations and licences**
For example ECSA, SACPCMP, PSIRA or trade licences, if the tender asks for them.

Standard bidding forms (SBD)

Most government tenders include these forms in the bid pack. Complete every field and sign where required.

Form	What it is
SBD 1	Invitation to bid, with your company details and declaration
SBD 3.1 / 3.2 / 3.3	Pricing schedule (the version depends on the type of tender)
SBD 4	Declaration of interest, including any links to state employees

Form	What it is
SBD 6.1	Preference points claim form (price and B-BBEE)
SBD 8	Declaration of past supply chain management practices
SBD 9	Certificate of independent bid determination

Technical and experience documents

- ☐ Company profile (services, contact details, directors)
- ☐ Reference letters or completion certificates from previous clients
- ☐ List of similar projects with values, dates and contact persons
- ☐ CVs and qualifications of key staff who will work on the project
- ☐ Methodology or work plan, if requested
- ☐ Proof of equipment, vehicles or facilities, if requested
- ☐ Health and safety plan or OHS file, if requested

Before you submit

- ☐ **Attend the compulsory briefing or site meeting**
Missing it usually means automatic disqualification.
- ☐ Buy the tender document if a fee applies and keep the proof of payment
- ☐ Answer every question, and write N/A where something does not apply. Never leave blanks
- ☐ Sign and initial every page where the form asks for it
- ☐ Check your prices add up, and that VAT is shown correctly
- ☐ Make copies of the full bid pack for your own records
- ☐ **Deliver before the closing time**
Late bids are rejected. Aim to submit at least a day early, and use the correct tender box or portal.

Need help getting this done? Olukuhle Consultants handles CIPC, SARS, COIDA, CIDB, CSD, B-BBEE, tenders, OHS safety files, business plans and company profiles. WhatsApp us on **+27 64 787 6994** or visit **olukuhle.co.za**.

This guide is general information only, not legal or tax advice. Requirements and fees change, so always confirm with the relevant authority or the tender document itself.