

SELF-BUILD · TENDER PROCESS

The Tender Checklist

A practical worksheet to check that a contractor's tender return is complete, compliant and ready to assess.

Work through each section as a tender is received. It covers the documents you should expect back, the information the contractor needs to confirm, and the checks to make before comparing bids or awarding the contract.

PROJECT	CLIENT
SITE ADDRESS	TENDER REFERENCE
TENDER RETURN DATE	CONTRACTOR

01

Confirm the paperwork before you assess the numbers.

Check every document listed in the invitation to tender has been returned, and that the contractor's submission answers each of the points below in full before it goes forward for comparison.

TENDER DOCUMENTS RECEIVED

☐ Invitation to Tender	☐ Building Regulations Notes
☐ Form of Tender	☐ Construction Specification
☐ Tender Checklist	☐ Schedule of Works
☐ Construction Drawings	☐ Structural Engineer's Drawings (if applicable)
☐ Site Plan	☐ Structural Calculations (if applicable)
☐ Elevations	☐ SAP Assessment (if applicable)
☐ Sections	☐ Drainage Information
☐ Construction Details	☐ Other Supporting Documents

TENDER SUBMISSION

☐ Tender Form completed	☐ Payment schedule included
☐ Lump Sum Price included	☐ Provisional Sums identified
☐ VAT clearly identified	☐ Prime Cost Items identified
☐ Start date confirmed	☐ Alternative quotations clearly identified
☐ Construction period confirmed	☐ Any exclusions listed
☐ Tender validity period stated	☐ Assumptions listed

02

Check who you're appointing, not just what they've quoted.

These sections establish whether the contractor is properly set up to carry out the work, and whether they have the experience and programme to deliver it.

CONTRACTOR INFORMATION

- | | |
|--|---|
| ☐ Company details provided | ☐ Company registration details |
| ☐ Contact details included | ☐ VAT registration number |
| ☐ Public Liability Insurance | ☐ Health & Safety Policy |
| ☐ Employers' Liability Insurance | ☐ CDM compliance confirmed |
| ☐ Contractors' All Risk Insurance | |
-

EXPERIENCE

- ☐ Similar projects completed
 - ☐ References supplied
 - ☐ Photographs / examples provided
 - ☐ Specialist subcontractors identified
-

PROGRAMME

- ☐ Proposed start date
 - ☐ Estimated completion date
 - ☐ Construction programme included
 - ☐ Key milestones identified
 - ☐ Long lead items identified
-

03

Quality, compliance and site conduct all matter as much as price.

A tender that looks competitive on price can still fall short here. Work through each point to see how thoroughly the contractor has thought about standards, compliance and their impact on site and neighbours.

QUALITY

- ☐ Materials comply with specification
- ☐ Proposed substitutions identified
- ☐ Manufacturer details included
- ☐ Warranties provided where applicable
- ☐ Guarantees identified

BUILDING REGULATIONS

- ☐ Compliance with Building Regulations confirmed
- ☐ Compliance with Planning Approval confirmed
- ☐ Compliance with Structural Engineer's design confirmed
- ☐ Building Control inspections allowed for
- ☐ Completion certificates to be provided

SITE MANAGEMENT

- | | |
|--|--|
| ☐ Site manager identified | ☐ Recycling arrangements |
| ☐ Welfare facilities provided | ☐ Protection of existing property |
| ☐ Site security arrangements | ☐ Neighbour liaison arrangements |
| ☐ Waste management included | |

04

Confirm what happens on site, and how the project ends.

Finally, check the practical arrangements for running the site are covered, and that the contractor has been clear about what handover will include and how the tender itself should be returned.

SERVICES

- ☐ Temporary water allowed for
- ☐ Temporary electricity allowed for
- ☐ Temporary toilet facilities
- ☐ Scaffolding included
- ☐ Plant and equipment included

HANDOVER

- | | |
|--|--|
| ☐ Final clean included | ☐ Renewable Energy Certificates |
| ☐ Building Control Completion Certificate | ☐ Operating manuals |
| ☐ Electrical Installation Certificate | ☐ Guarantees and warranties |
| ☐ Gas Safe Certificate (if applicable) | ☐ As-built information supplied |

TENDER RETURN

- ☐ Tender signed
- ☐ All requested information included
- ☐ Returned by required date
- ☐ Electronic copy submitted
- ☐ Hard copy submitted (if required)

05

Declaration and Recommendation

Ask the contractor to confirm the following before their tender is accepted.

I confirm that this tender has been prepared in accordance with the tender documentation, and that all information requested has been provided.

COMPANY

NAME

POSITION

SIGNATURE

DATE

HOUSEPLANSDIRECT RECOMMENDATION

A complete, well-structured tender return is the clearest early sign of how a contractor will run the job.

Chase up anything missing before you compare bids, and get any exclusions, assumptions or provisional sums confirmed in writing. A tender that is thorough and transparent at this stage generally leads to fewer surprises once construction is under way.

HOUSEPLANSDIRECT

Before you issue tenders, make sure the information is complete.

A fair, comparable set of tenders depends on every contractor pricing from the same clear drawings, specification and project information. If your package is still in progress, or you're unsure whether you have enough detail to invite reliable tenders, Houseplansdirect can help you identify what should come next.

Check whether your project is ready to tender