BLUERISK LKD

Tender, Bid and RFI Safety Checklist

Check your safety documents before you submit a tender, bid or RFI.

Clients, mines and power stations check safety paperwork before they award work. Use this checklist to find gaps before you submit. Tick each box as you go. Requirements differ between clients, so always follow the tender documents first.

1. Read the tender documents first

Many bids are lost because a required document was missed. Find the safety requirements before you price.

- [ ] Closing date, time and submission method (email, portal or hand delivery)
- [ ] Scope of work, site location and expected start date
- [ ] The client's health and safety specification and any SHE requirements
- [ ] Mandatory documents and compulsory briefing or site meeting dates
- [ ] Evaluation criteria: how much weight is given to safety, price and experience
- [ ] Questions and clarification deadline noted, and questions sent in time

2. Company documents the client may ask for

- [ ] Company registration documents and directors' details
- [ ] Tax clearance or tax compliance status, and BBBEE certificate or affidavit, if required
- [ ] Letter of good standing from the Compensation Fund (COIDA), if you have employees
- [ ] Public liability and other insurance cover required by the client
- [ ] Signed OHS policy from top management
- [ ] Legal appointments signed, dated and accepted (where applicable to your work)

3. Safety information for the bid

- [ ] Your safety statistics or incident record, if the client asks (for example, injury and incident rates)
- [ ] References or a list of similar completed work
- [ ] Organogram showing who is responsible for safety on this project
- [ ] Proof of the training and competence of key people
- [ ] Medical certificates of fitness for the people who will go on site
- [ ] Plant, tools and equipment list, with inspection or test records where needed

4. Method statement and risk assessment

- [ ] A method statement for the main tasks, in the order the work will be done
- [ ] A baseline or project risk assessment that matches the scope
- [ ] Controls for high-risk work in the scope (for example, work at heights, confined spaces, hot work, electrical work and lifting)
- [ ] Emergency arrangements: first aid, emergency contacts and evacuation
- [ ] How you will manage subcontractors, if you use them

5. Shutdown and site-entry readiness (if applicable)

Mines and power stations often need your Safety File accepted before you can start. Start the file early.

- [ ] Site induction and access requirements, and how long it takes to get people cleared
- [ ] Permit, lock-out and isolation arrangements for the site
- [ ] Medicals and training certificates are current for the whole shutdown period
- [ ] Documents are ready to submit when the contract is awarded, not after

6. Before you submit: final checks

- [ ] Every mandatory document is included, signed where required and still valid
- [ ] The documents are named, ordered and numbered the way the tender asks
- [ ] Names, dates, company details and project name are correct on every page
- [ ] Someone other than the author has checked the submission
- [ ] You have confirmation that your submission was received

> **Please note:** This checklist is a general guide, not legal advice. Each tender has its own requirements, and the tender documents always come first. Having the documents ready supports your bid, but it does not replace your own duty to manage safety on site.

Need help with a tender, bid or RFI?

We have nearly 20 years of experience with mines, Eskom shutdowns and tender submissions. We compile Safety Files and safety documents for your bids, and we work with you personally from the first request to the finished submission.

Request your quotation: www.bluerisklkd.co.za/safety-files/