

Tender Toolkit

Guide #4: Policies & Attachments: What You Need and How to Provide It

Get your documents in order before you hit submit

Tenders often require you to attach specific documents. Some are mandatory, others are highly recommended.

| Policy/Document | Must Have? | Why It Matters |
|--|-----------------|---|
| Insurances | ✓ | Legal/contractual requirement. Must meet tender specs. |
| Workers Comp | ✓ | Proof of employee safety compliance, non-negotiable. |
| Safety Policy | ✓ | Confirms your safety systems meet workplace laws. Often non-negotiable. |
| Risk Management Plan | ✓ | Shows how you manage risk in delivering services. Often requested for higher-risk works. |
| Capability Statement | ✓ | Overview of services, key people, experience. Often assessed directly. |
| Conflict of Interest Dec. | ✓ | Standard probity requirement. Failure to disclose = disqualification. |
| Dec. of Non-Collusion | ✓ | Confirms independence of your tender. Common in government procurement. |
| Schedule of Rates/Pricing | ✓ | Required for pricing evaluation. Needs to be formatted as specified. |
| Addendum Acknowledgement | ✓ (if issued) | Confirms you've read any updates or clarifications. Miss this and your bid may be non-compliant. |
| Code of Conduct | ✓ (if required) | Some tenders require you to agree to their supplier code. Check specifications. |
| Conformance / Departures Schedule | ✓ (if required) | Must declare anything you can't or won't comply with. Be upfront. |
| Fair Jobs Code Dec. | ✓ (if required) | Mandatory under the Fair Jobs Code for contracts over a certain threshold. |
| Social Procurement Statement/Plan | ✓ | Strongly weighted in VicGov and council scoring. Helps meet social impact goals. |
| Environmental Policy | ✓ | Key for sustainability criteria. Becoming standard in local and state procurement. |
| Quality Policy | ✓ | Demonstrates service/process standards. Useful for technical, infrastructure, or service delivery bids. |
| CVs of Key Personnel | ✓ | Demonstrates you have qualified people to deliver. Especially important for professional services. |
| Industrial Relations | ✓ | Required for construction, infrastructure, or where IR risks are flagged. |

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| Modern Slavery / Ethical Supply | ✓ | Increasingly expected for larger or state-linked tenders. |
| Client References / Past Projects List | ✓ | Helps validate your experience. Include contacts if permitted. |

Tips for Providing Attachments

- Label clearly: “Attachment A – WHS Policy”, “Attachment B – Insurance Certificate”
- Match the checklist: If the tender asks for 6 documents, name them exactly as requested.
- Double check expiry dates: Outdated certificates = rejection risk.
- PDF preferred: Unless specified otherwise, combine policies into one PDF if allowed.
- Don’t assume they’ll read it: answer questions in the evaluation section, don’t assume they’ll read your attachments as part of the assessment.

Need a Policy? Use Our Templates

Download editable Word templates from this toolkit to help you get started:

- WHS Policy (template)
- Environmental Policy (template)
- Quality Policy (template)
- Social Procurement Statement (starter template)

Real World Example

A local cleaning business missed out on a council contract, not because of price or experience, but because their insurance documents had expired and they lacked a WHS policy. These “admin” items matter more than most think.