



Purpose: This checklist is intended as a practical reference for assessing whether bid security has been submitted in accordance with the requirements set out in the tender documents. It is designed for use by project managers, procurement personnel, and other stakeholders involved in the bid submission or evaluation process. The items listed are not sequential and do not address all tender requirements (such as insurance). Certain items represent alternative compliance paths and are therefore not intended to be completed as a simple check-the-box exercise.

Review and Bond Requisition	Submission
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1. Review bid security delivery and format requirements and confirm what's acceptable:

- Physical
- Electronic (PDF)
- e-Bond/digital bond (verifiable PDF)
- Verify docs are to be a SINGLE FILE or SEPARATE

2. SPECIFY bid bond format in bond requisition form:

- Physical
- Electronic (PDF)
- e-Bond/digital bond (verifiable PDF)

3. SPECIFY in bond requisition form:

- Project name, description, unique no. (e.g. RFT-2026)

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- Owner full name and address
 - Architect/consultant name and address
 - Bid close date
 - Maintenance period (12 or 24 months)
 - Holdback percentage
 - Penalties / liquidated damages per diem
 - Bid percentage
 - Consent of surety needed? Y or N
 - Performance and payment bond percentage
 - Contract form (CCDC/Broad Form)

4. Input your bid info into the bond requisition form:

- Contract value
- Cost summary
- Current Work-On-Hand (especially for large bids)
- Project duration

5. Email bond requisition to surety broker:

- Attach completed bond requisition
- Attach tender documents, including all issued addenda
- Specify due date and delivery method
- Respond promptly to any additional information requests
- Additional Information:

6. Receive bid security from surety broker:

- Authorized Principal to sign and seal (as specified)
- Accept delivery of executed bid security docs
- Review Bid close date and notify broker if changed
- Review all information matches per review and requisition

Preserve bid security docs and **DO NOT ALTER**

- If digital bond (e-bond), test security verification function
- BEST PRACTICE - Screenshot security verification
- BEST PRACTICE - Check file sizes and screenshot for reference
- If bid security verification fails contact surety broker and DO NOT ATTEMPT TO FIX
- Failed security verification corrected

7. Store bid security documents

- BEST PRACTICE - If physical docs, store in a locked cabinet
- BEST PRACTICE - If digital bond save in a READ-ONLY folder
- BEST PRACTICE - Screenshot where stored for ease of recall
- BEST PRACTICE - Limit access to individual submitting tender

8. Submit bid security documents:

- BEST PRACTICE - Re-verify bid security docs before submitting
- BEST PRACTICE - File size match per screenshot?
- BEST PRACTICE - Screenshot re-verification
- Time and date submitting _____
- Mail, hand deliver, email _____
- Upload original file(s) on specified portal _____
- BEST PRACTICE - Save and screenshot confirmation reference

9. After bid close:

- BEST PRACTICE - Lock bid folder containing bond, verification proof, upload confirmation

If rejected for bond issues:

- Ask what failed and how it was verified
- Ask if file was altered
- Respond promptly, in writing
- Issue corrected and accepted

Additional Considerations

- Record Keeping: Maintain accurate records, including copies of the original documents, and screenshots of digital verification confirmations, and any correspondence related to the bid security.
- Security Measures: Implement appropriate security measures to safeguard bid securities from loss, theft, or unauthorized access.
- Regular Audits: Conduct regular audits of bid security procedures to identify and address any weaknesses or vulnerabilities.
- Legal Counsel: Consult with legal counsel to ensure that bid security practices comply with all applicable laws and regulations.