

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT

CONTRACTOR PRE-QUALIFICATION REQUIREMENTS

GENERAL CONTRACTORS, MECHANICAL/PLUMBING SUBCONTRACTORS AND ELECTRICAL SUBCONTRACTORS

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BIDDER'S QUALIFICATION AND VERIFICATION FORMS

**CONTRACTOR'S STATEMENT OF EXPERIENCE
AND FINANCIAL CONDITION**

REQUEST FOR PRE-QUALIFICATION OF BIDDERS

(Public Contract Code Section 20111.6)

This requirement is for all contracts estimated at \$1,000,000 or over, awarded after January 1, 2014, that use any state funds.

It is mandatory that all General Contractors, Mechanical/Plumbing Subcontractors, and Electrical Subcontractors (Contractors) for projects estimated at \$1,000,000 or over must fully complete this Questionnaire, provide all materials requested herein, and be approved by the PASO ROBLES JOINT UNIFIED School District (District) in order to bid.

Mechanical, electrical and plumbing contractors subject to this requirement are those with any of the following license classifications: C-4, C-7, C-10, C-16, C-20, C-34, C-36, C-38, C-42, C-43 and C-46.

If two or more businesses intend to perform a construction project as a joint venture, each entity within the Joint Venture must be separately prequalified.

Answers to questions contained in the attached Pre-qualification Questionnaire and Financial Statement are required, including a complete statement of prospective bidder's financial ability and experience in performing public works. These documents will be the basis of qualifying a Contractor wishing to bid with the District. The District reserves the right to check other sources available. Omission of, or refusal to supply, requested information can result in automatic disqualification.

The Questionnaire and Financial Statements are not public records and are not open to public inspection. All information provided will be kept confidential to the extent permitted by law. PASO ROBLES JOINT UNIFIED School District reserves the right to reject any and all Pre-qualification Questionnaires and to waive any irregularities in the information contained therein.

Each Questionnaire must be signed under penalty of perjury by an individual who has the legal authority to bind the Contractor on whose behalf that person is signing. If any information provided by a Contractor becomes inaccurate, the Contractor must immediately notify the awarding body and provide updated accurate information in writing and under penalty of perjury.

The information will remain current for 12 months from the notice of qualification. The applicant may renew the Contractor's Statement of Experience and Financial Condition (Statement) by filing an updated Statement via the process in effect at that time.

Contractors are encouraged to submit pre-qualification applications as soon as possible to ensure notification of prequalification status well in advance of a bid process. In order to submit a valid bid for any public project requiring pre-qualification, contractors must submit the pre-qualification questionnaire, a financial statement, and all other requested materials at least ten

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(10) business days prior to the date fixed for the public opening of sealed bids. All contractors must be deemed pre-qualified to bid at least five (5) business days prior to that date.

SUBMISSION OF COMPLETED STATEMENTS

Mail completed Contractor's Statement of Experience and Financial Condition along with the following:

- Cal/OSHA 300 logs for past 3 years
- California Contractor's License
- Surety history for past 5 years
- Letter of Bondability
- Certificate of Insurance
- Reviewed or Audited Financial Statement (For projects \$1,000,000 to \$9,999,999)
- OR**
- Audited Financial Statement (For projects \$10,000,000 or greater)
- Accountant's Release Letter

To: PASO ROBLES JOINT UNIFIED School District
Attn: Christina Bennett, Purchasing Manager
800 Niblick Rd.
P.O. Box 7010
Paso Robles, CA 93446

Please mark envelope "Confidential".

BASIS FOR PRE-QUALIFICATION

1. Contractor will have answered “YES” to questions 1-8 of the Quick Check questions.
2. Contractor must not have answered “YES” to questions 9-20 of the Quick Check **DISQUALIFYING QUESTIONS**.
3. Contractor must have *completed* a minimum of three (3) public works projects, specifically for school districts, including community college districts or public university construction projects for \$1,000,000 or more in the State of California within the last five (5) years.
4. Contractor must score a minimum of 80 points in Appendices – **SCORED INTERVIEW QUESTIONS**.
5. Contractor must be able to secure bonding for a minimum of \$1,000,000 (contractors bidding solely as subcontractors to prime contractors do not need to meet this requirement).

Quick Check

Should I fill out this Questionnaire?

The following are screening statements, which should be used to determine whether or not you pass the test to require you to enter the pre-qualification process.

You must be able to answer “YES” to each statement below.

1. Select the appropriate category(ies) for which the Contractor is seeking prequalification. Leave non-applicable category(ies) blank.

For General/Prime Contractors: Contractor possesses a valid and current California Contractor’s “A” or “B” license. Yes_____ No _____

For Mechanical Subcontractors: Contractor possesses a valid and current California Contractor’s “C” license. Yes_____ No _____

For Plumbing Subcontractors: Contractor possesses a valid and current California Contractor’s “C” license. Yes_____ No _____

For Electrical Subcontractors: Contractor possesses a valid and current California Contractor’s “C” license. Yes_____ No _____

2. Your firm is intending to bid a job at \$1,000,000 or over (Projects estimated at less than \$1,000,000 do not require pre-qualification.) Yes_____ No_____
3. Your firm has general liability insurance with a policy limit of at least \$2,000,000 per occurrence and \$4,000,000 aggregate. If your firm is bidding on a project over \$5,000,000 it has a policy limit of at least \$3,000,000 per occurrence and \$6,000,000 aggregate. **NOTE: The insurance limits are fixed and are not negotiable. If your firm does not have insurance with the required minimum levels you will not be pre-qualified.** Yes_____ No_____
4. Your firm has a current workers’ compensation insurance policy as required by the Labor Code or it is legally self-insured pursuant to Labor Code Section 3700 et seq. Yes_____ No_____
5. Your firm has attached a notarized statement from an admitted surety insurer approved by the California Department of Insurance and authorized to issue bonds in the State of California which states your aggregate and per project bonding capacity within 30 days preceding the submission of this Statement. Yes_____ No_____
6. Your firm has an audited or reviewed financial statement with accompanying notes and supplemental information, (as appropriate), that is less than 18 months old. Yes_____ No_____
7. Your firm has *completed* at least three (3) public works projects, specifically for school districts, including community college districts or public university construction projects in

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the State of California valued at a minimum of \$1,000,000 each within the last five (5) years. (Public Works is defined as facilities built for government agencies including school districts, special districts, local, county, state and federal agencies and requiring prevailing wage rates paid to workers.) Yes_____ No_____

8. Your firm is eligible to bid on a school district construction contract as per Sections 1777.1 and 1777.7 of the Labor Code. Yes_____ No_____

If you can answer “Yes” to all of the above statements, please proceed.

DISQUALIFYING QUESTIONS

A “Yes” response to *any* of the following questions will result in automatic disqualification.

9. Is your firm currently the debtor in a bankruptcy case?
 Yes No
10. Have *any* of your contractor’s licenses been revoked at any time in the last five (5) years?
 Yes No
11. In the last five (5) years has your firm, or any firm with which any of your company’s owners, officers or partners was associated, been debarred, disqualified, defaulted, found non-responsible, terminated for cause, removed or otherwise prevented from bidding on, or completing, any government agency or public works project for any reason? This includes any agreement in which your firm voluntarily agrees not to bid.
NOTE: “Associated with” refers to another construction firm in which an owner, partner or officer of your firm held a similar position, and which is listed in response to Section 3, question 1c or 1d in this questionnaire.
 Yes No
12. In the last five (5) years, has your firm been denied an award of a public works contract based on a finding by a public agency that your company was not a responsible bidder?
 Yes No
13. At any time during the last five (5) years, has any surety company made any payments on your firm’s behalf as a result of a default, to satisfy any claims made against a **payment bond** issued on your firm’s behalf in connection with a construction project, either public or private?
 Yes No
14. At any time during the last five (5) years, has any surety company made any payments on your firm’s behalf as a result of a default, to satisfy any claims made against a **performance bond** issued on your firm’s behalf in connection with a construction project, either public or private?
 Yes No
15. Has your firm or any of its owners, officers, or partners ever been found liable in a civil suit, or found guilty in a criminal action, for making any false claim or material misrepresentation to any public agency or entity?
 Yes No
16. Has your firm or any of its owners, officers or partners ever been convicted of a crime involving any federal, state, or local law related to construction, either public or private?
 Yes No

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- 17. Has your firm or any of its owners, officers or partners ever been convicted of a federal or state crime of fraud, theft, or any other act of dishonesty?
 Yes No

- 18. Has CAL OSHA cited and assessed penalties against your firm for any “serious,” “willful” or “repeat” violations of its safety or health regulations in the last five (5) years?
Note: If you have filed an appeal of a citation and the Occupational Safety and Health Appeals Board has not yet ruled on your appeal, you need not include information about it.
 Yes No

- 19. At any time in the last five (5) years, has your firm or any of its owners or officers been convicted of a crime involving the awarding of a contract of a government construction project, or the bidding or performance of a government contract?
 Yes No

- 20. At the time of submitting this pre-qualification form, is your firm ineligible to bid on or be awarded a public works contract, or perform as a subcontractor on a public works contract, pursuant to either Labor Code sections 1777.1 or 1777.7?
 Yes No

I, the undersigned, certify and declare that I have read all the foregoing answers to this pre-qualification questionnaire and know their contents. The matters stated in the questionnaire answers are true of my own knowledge and belief, except as to those matters stated on information and belief, and as to those matters, I believe them to be true. I declare under penalty of perjury, under the laws of the State of California, the foregoing is true and correct.

For: _____
Company Name

By: _____
Signature, Authorized Representative

Dated: _____

Name: _____
(Print or Type Name of Authorized Representative)

Title: _____
(Print of Type Title of Authorized Representative)

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PRE-QUALIFICATION CHECKLIST

BEFORE YOU SUBMIT YOUR PRE-QUALIFICATION QUESTIONNAIRE HAVE YOU DONE THE FOLLOWING?

- Have you completed all the information required in Section 1 – General Information beginning on page 9?
- Did you include the Cal/OSHA 300 logs for past 3 years required on page 9? NOTE: Summaries are not acceptable. To see an example of a Cal/OSHA 300 log please see the Appendices section at the back of the Questionnaire package.
- Have you completed all the information required in Section 2 – Organization History, Performance and Compliance with Civil and Criminal Laws beginning on page 10?
- Did you sign the affidavit on page 16?
- Did you include the Certificate of Insurance required on page 18?
- Did you include a total of five (5) years of surety information required on page 19?
- Did you include the Letter of Bondability from your bonding surety required on page 20?
- Did you include three (3) recent construction projects and all of the requested information in Section 5 starting on page 21? NOTE: Please include CURRENT contact information for the projects listed.
- Did you include either a Reviewed or Audited Financial Statement (reviewed for projects under \$10,000,000, audited for projects over \$10,000,000) required in Section 6 – Financial Information on page 25?
- Did you include a copy of the certificate of a licensed accountant required on page 26?
- Did you include your Accountant’s Release Letter required on page 27?

IF YOU HAVE ANY QUESTIONS REGARDING THE QUESTIONNAIRE AND/OR ITS REQUIREMENTS, PLEASE CONTACT CHRISTINA BENNETT AT (805) 769-1000 x30250 or cmbennett@pasoschools.org

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**CONTRACTOR'S STATEMENT OF EXPERIENCE
AND FINANCIAL CONDITION**

Please Type or Print Clearly

SECTION 1 - GENERAL INFORMATION

Contractor: _____
(As name appears on license)

Check One: Corporation _____
Partnership _____
Sole Prop. _____
Joint Venture _____
LLC _____

Contact Person: _____

E-Mail Address: _____

Address: _____

Phone:(____) _____ Fax Number (____) _____ Email _____

If firm is a sole proprietor or partnership, provide Owner(s) of Company _____

If Contractor is a Corporation, provide the State of Incorporation: _____

Seeking Prequalification for: General Contractor _____ Mechanical Subcontractor _____ Plumbing
Subcontractor _____ Electrical Subcontractor _____

License # _____ Class: _____ Exp. Date: _____ DIR # _____

Supplemental classification(s) held, if any, and license number(s): _____

District Use Only: Verified by District _____ on _____ by speaking with _____. License Clear: _____ Yes _____ No (www.cslb.ca.gov web page or 1-800-321-2752 for computer)
--

Tax ID Number: _____ Date Business Formed: _____
Corporate Identification Number _____

1. In what type of Construction do you specialize? _____
2. Attach copies of Cal/OSHA Form 300 Logs from the past 3 years. SEE APPENDICES FOR EXAMPLE OF Cal/OSHA Form 300 LOG. SUMMARIES ARE NOT ACCEPTABLE.

District Use Only: Verified by District by _____ on _____, for _____ years.
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3. Are you currently pre-qualified with any other school district or public agency in San Luis Obispo County ___Yes ___No

If yes, list ALL agencies for which you have already prequalified:

I hereby allow you to contact the district(s) and public agencies above to discuss my rating/pre-qualification.

_____ Signed _____ Dated

4. Is your firm an EBE? ___Yes ___No. *If Yes, list all of your certifications.*

5. Is your firm a DVBE contractor? ___Yes ___No. *If Yes, list your DGS certification number, or if you are certified through SDVOB please provide a copy of your verification letter.*

SECTION 2 - ORGANIZATION, HISTORY, PERFORMANCE, AND COMPLIANCE WITH CIVIL AND CRIMINAL LAWS

A. Current Organization and Structure of the Business

For Firms That Are Corporations:

- 1a. Date incorporated: _____
- 1b. Under the laws of what state: _____
- 1c. Provide all the following information for each person who is either (a) an officer of the corporation (president, vice president, secretary, treasurer), or (b) the owner of at least ten percent of the corporation’s stock.

Name	Position	Years with Co.	% Ownership

- 1d. Identify every construction firm that any person listed above has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years.
NOTE: For this question, “owner” and “partner” refer to ownership of ten percent or more of the business, or 10 per cent or more of its stock, if the business is a corporation.

Person’s Name	Construction Firm	Dates of Person’s Participation with Firm

- 1e. Provide a copy of most recent certification from the California Secretary of State indicating standing.

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For Firms That Are Partnerships:

- 1a. Date of formation: _____
- 1b. Under the laws of what state: _____
- 1c. Provide all the following information for each partner who owns 10 percent or more of the firm.

Name	Position	Years with Co.	% Ownership

- 1d. Identify every construction company that any partner has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years.
NOTE: For this question, “owner” and “partner” refer to ownership of ten percent or more of the business.

Person’s Name	Construction Company	Dates of Person’s Participation with Firm

For Firms That Are Sole Proprietorships:

- 1a. Date of commencement of business. _____
- 1b. Social security number of company owner. _____
- 1c. Identify every construction firm that the business owner has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years.
NOTE: For this question, “owner” refers to ownership of ten percent or more of the business.

Person’s Name	Construction Company	Dates of Person’s Participation with Co.

For Firms That Intend to Submit a Bid as Part of a Joint Venture:

- 1a. Date of commencement of joint venture. _____
- 1b. Provide all of the following information for each firm that is a member of the joint venture that expects to bid on one or more projects:

Name of firm	% Ownership of Joint Venture

- 1c. Please provide a true, correct executed copy of the joint venture agreement.

NOTE: The joint venture agreement must contain identical or similar language as follows:

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“All obligations, expenses and losses incurred, and all payments made in connection with the Joint Venture including, without limitation, any liability for damages arising out of claims or actions against the Joint Venture in connection with the anticipated contract(s) or projects, shall be the obligations of the Joint Venture. Each Joint Venturer shall be individually liable according to its pro rata share of ownership as well as jointly and severally liable to the District for the obligations of the Joint Venture, including but not limited to claims or actions on indemnity, defect, and warranty.”

For Firms That Are Limited Liability Companies (LLC):

- 1a. Date of formation: _____
- 1b. Under the laws of what state: _____
- 1c. Provide all the following information for each member who owns 10 percent or more of the firm.

Name	Position	Years with Co.	% Ownership

- 1d. Identify every construction company that any member has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years.
NOTE: For this question, “owner” and “partner” refer to ownership of ten percent or more of the business, or ten per cent or more of its stock, if the business is a corporation.

Person’s Name	Construction Company	Dates of Person’s Participation with Firm

B. History of the Business and Organizational Performance

- 2. Has there been any change in ownership of the firm at any time during the last three (3) years?
NOTE: A corporation whose shares are publicly traded is not required to answer this question.
 Yes No
If Yes, explain on a separate signed page.
- 3. Is the firm a subsidiary, parent, holding company or affiliate of another construction firm?
NOTE: Include information about other firms if one firm owns 50 per cent or more of another, or if an owner, partner, or officer of your firm holds a similar position in another firm.
 Yes No
If Yes, explain on a separate signed page.
- 4. Have any of your firm’s corporate officers, partners, members, or owners served in the same capacity in another construction firm in the past five (5) years?
NOTE: Include information about other firms if an owner, partner, member, or officer of your firm holds a similar position in another firm.
 Yes No
If Yes, explain on a separate signed page.
- 5. How many years has your organization been in business in California as a contractor under your present business name and license number? _____
- 6. Was your firm in bankruptcy at any time during the last five (5) years?
 Yes No

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If Yes, explain on a separate page.

C. Licenses

7. If any of your firm’s license(s) are held in the name of a corporation or partnership, list below the names of the qualifying individual(s) listed on the CSLB records who meet(s) the experience and examination requirements for each license.

8. Has your firm changed names or license number in the last five (5) years?

Yes No

If Yes, explain on a separate signed page, providing prior name/license number, date of change and circumstances surrounding the change.

9. Has any owner, partner or (for corporations:) officer of your firm operated a construction firm under any other name in the last five (5) years?

Yes No

If Yes, explain on a separate signed page, provide the prior name, the date of change and the circumstances surrounding the change.

10. Has any CSLB license held by your firm or its Responsible Managing Employee (RME) or Responsible Managing Officer (RMO) been suspended within the last five (5) years?

Yes No

If Yes, please explain on an attached separate sheet of paper

D. Contractual Obligations and Disputes – PRJUSD Projects

11. At any time during the last five (5) years has your firm received one or more “Notices of Non Compliance” from the District’s representative on District projects?

Yes No

If Yes, explain on a separate signed page, providing the project name(s), contract number(s), date of award and circumstances related to your receipt of the notice

12. At any time in the last five (5) years has your firm filed two or more requests to withdraw or to be released from a District bid?

Yes No

If Yes, explain on a separate signed page, providing the project name(s), contract number(s) and the circumstances under which you sought withdrawal.

13. At any time during the last five (5) years has your firm been penalized for illegal/improper Substitution of a Listed Subcontractor on District projects?

Yes No

If Yes, explain on a separate signed page, providing the project name(s), contract number(s), the name(s) of the subcontractor(s).

14. At any time in the last five (5) years, has your firm been assessed and paid liquidated damages after completion of a project on District projects

Yes No

If Yes, please explain on an attached separate sheet of paper.

E. Contractual Obligations and Disputes – All Public Works Projects

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NOTE: The first two questions refer only to disputes between your firm and the owner of a project. You need not include information about disputes between your firm and a supplier, another contractor, or subcontractor. You need not include information about “pass-through” disputes in which the actual dispute is between a sub-contractor and a project owner.

15. Within the last five (5) years, how many times has your company been awarded a public works contract in which you “failed to execute” a contract? **Note: “Failure to Execute” is any of the following: (1) Refusal to pick up, sign, and/or return contract documents; (2) Inability to obtain insurance and/or bond requirements.**

Yes No

If Yes, please list all instances with explanations on an attached separate sheet of paper.

16. In the last five (5) years, has any claim **against** your firm concerning your firm’s work on a construction project, either public or private, been **filed in court or arbitration?**

Yes No

If “Yes,” on separate signed sheets of paper identify the claim(s) by providing the project name, date of the claim, name of the claimant, a brief description of the nature of the claim, the court in which the case was filed and a brief description of the status of the claim (pending or, if resolved, a brief description of the resolution).

17. In the last five (5) years, has your firm been involved in any arbitration, mediation, or other dispute resolution process, or litigation with a project owner, filed any claims with a project owner or had any claim filed against it by a project owner, regardless of outcome?

Yes No

If “Yes,” on separate signed sheets of paper identify the claim by providing the project name, date of the claim, name of the entity (or entities) against whom the claim was filed, a brief description of the nature of the claim, the court in which the case was filed and a brief description of the status of the claim (pending, or if resolved, a brief description of the resolution).

18. In the last five (5) years, has any insurance carrier, for any form of insurance, refused to renew the insurance policy for your firm?

Yes No

If Yes, please list all instances with explanations on an attached separate sheet of paper.

19. If your firm was required to pay a premium of more than one per cent (1%) for a performance and payment bond on any project(s) on which your firm worked at any time during the last three years, state the percentage that your firm was required to pay. ***Provide an explanation for a percentage rate higher than one per cent on an attached separate sheet of paper.***

_____ %

20. During the last five (5) years, has your firm ever been denied bond credit by a surety company, or has there ever been a period of time when your firm had no surety bond in place during a public construction project when one was required?

Yes No

If Yes, please list all instances with explanations on an attached separate sheet of paper.

F. Worker Safety, Prevailing Wage, Workers Compensation, Apprenticeship – All Public Works Projects

21. Within the past five (5) years has the Department of Industrial Relations/Division of Labor Standards Enforcement found your firm or, if a General Contractor, your subcontractors to have failed to pay prevailing wage on a public works project?

Yes No

If Yes, please explain _____

You may attach an explanation if you wish.

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22. Has there been more than one occasion during the last five (5) years on which your firm was required to pay either back wages or penalties for your own firm's failure to comply with the **state's** prevailing wage laws?

Yes No

NOTE: This question refers only to your own firm's violation of prevailing wage laws, not to violations of the prevailing wage laws by a subcontractor.

If Yes, please list all instances with explanations on an attached separate sheet of paper.

23. During the last five (5) years, has there been more than one occasion on which your own firm has been penalized or required to pay back wages for failure to comply with the **federal** Davis-Bacon prevailing wage requirements?

Yes No

If Yes, please list all instances with explanations on an attached separate sheet of paper.

24. Has the EPA, Department of Environmental Health or any Air Quality Management District or any Regional Water Quality Control Board or any other agency with competent jurisdiction cited and assessed penalties against either your firm or the owner of a project on which your firm was the contractor, in the last five (5) years?

NOTE: If you have filed an appeal of a citation and the Appeals Board has not yet ruled on your appeal, or if there is a court appeal pending, you need not include information about the citation.

Yes No

If Yes, please list all instances with explanations on an attached separate sheet of paper.

25. How often do you require documented safety meetings to be held for construction employees and field supervisors during the course of a project? _____

26. List your firm's Experience Modification Rate (EMR) (California workers' compensation insurance) for each of the past three premium years

Current year: _____

Previous year: _____

Year prior to previous year: _____

If your EMR for any of these three years is or was 1.00 or higher, you may, if you wish, attach a letter of explanation.

NOTE: An Experience Modification Rate is issued to your firm annually by your workers' compensation insurance carrier.

27. Within the last five (5) years, has there ever been a period when your firm had employees but was without workers' compensation insurance or state-approved self-insurance?

Yes No

If Yes, please list all instances with explanations on an attached separate sheet of paper.

28. Provide the name, address, and telephone number of the apprenticeship program sponsor(s) (approved by the California Division of Apprenticeship Standards) that will provide apprentices to your company for use on any public work project for which you are awarded a contract by PASO ROBLES JOINT UNIFIED School District.

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29. If your firm operates its own State-approved apprenticeship program:
- a. Identify each craft or crafts in which your firm provided apprenticeship training in the past year.
 - b. State the year in which each such apprenticeship program was approved, and attach evidence of the most recent California Apprenticeship Council approval(s) of your apprenticeship program(s).
 - c. State the number of individuals who were employed by your firm as apprentices at any time during the past three (3) years in each apprenticeship and the number of persons who, during the past three (3) years, completed apprenticeships in each craft while employed by your firm.

Provide all requested information on a separate sheet of paper and attach to this Questionnaire.

30. At any time during the last five (5) years, has your firm been found to have violated any provision of the California apprenticeship laws or regulations, or the laws pertaining to the use of apprentices on public works?
 Yes No

If yes, provide the date(s) of such findings, and attach copies of the Department's final decision(s).

I, the undersigned, certify and declare that I have read all the foregoing answers to this pre-qualification questionnaire and know their contents. The matters stated in the questionnaire answers are true of my own knowledge and belief, except as to those matters stated on information and belief, and as to those matters I believe them to be true. I declare under penalty of perjury under the laws of the State of California, that the foregoing is correct.

Signed: _____ Dated: _____

Print Name: _____ Title: _____

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SECTION 3 - INSURANCE

For projects *under* \$5,000,000, do you currently have a minimum of \$2,000,000 per occurrence and \$4,000,000 aggregate Combined Comprehensive Single Limit Liability Insurance? ____ Yes ____ No.

For projects *over* \$5,000,000, do you currently have a minimum of \$3,000,000 per occurrence and \$6,000,000 aggregate Combined Comprehensive Single Limit Liability Insurance? ____ Yes ____ No.

Attach your certificate of insurance for verification.

AMOUNT OF INSURANCE \$ _____ per occurrence _____ aggregate

Years With Ins. Co.: _____

Insurance Company Information

Name: _____

Address: _____

Phone #: () _____

Contact: _____

NOTE: If under two years with company, please list prior insurance companies on a separate page, including phone numbers and contact names.

District Use Only: Verified by District by _____ on _____ by speaking with _____ Comments: _____ _____ Certificate of Insurance attached? ____ Yes ____ No Expiration date of insurance: _____

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Exchange this page for a current original certificate of insurance.

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SECTION 4 - SURETY INFORMATION

Provide a statement listing names of all surety companies, not agencies, utilized by your firm in the last five (5) years. Please provide a letter stating bondability from surety company that is authorized to do business in California and is listed as a surety with the California Department of Insurance and is rated at least A-: VII, by A.M. Best Key Rating.

Company	Contact & Phone #	Largest Bond	List Years Used

<p>District Use Only: Verified by District by _____ on _____ by speaking with _____ How long has the contractor been client?: _____ Has the contractor defaulted on a contract that caused the surety to suffer a loss in the past two years?: _____ Yes _____ No Comments: _____ Has the contractor ever failed to complete a contract?: _____ Yes _____ No Comments: _____ Has the contractor been suspended, dismissed, deemed not responsible, debarred, terminated for cause, or declared in default from a project during the past two years?: _____ Yes _____ No Comments: _____</p>
<p>Has the contractor declared bankruptcy or ever been placed in receivership within the past three years?: _____ Yes _____ No Comments: _____ Are there any positive answers to the prior three questions? If yes, contractor is disqualified. What is the largest contract this contractor has had bonded through this surety?: _____ What maximum size project would your surety most likely bond this contractor for?: _____ Are there any outstanding stop notices or liens currently unresolved on contracts that have been completed that you are aware of? _____ Yes _____ No If yes, # _____ Comments: _____</p>

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

Exchange this page for a current original letter of bondability which clearly shows bonding agency's estimate of largest single bond amount most likely approvable.

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

SECTION 5– RECENT CONSTRUCTION PROJECTS COMPLETED

Contractor shall provide information about its three (3) *largest school projects*, including community college districts and public university projects at \$1,000,000 or more **completed** in the State of California within the last five (5) years. Names and references must be current and verifiable.

1. Project Name: _____

Location: _____

Owner: _____

Owner Contact (name and *current* phone number): _____

Architect or Engineer of Record: _____

AOR or EOR Contact (name and *current* phone number): _____

Owner's Construction Manager (name and *current* phone number): _____

Description of Project, Scope of Work Performed: _____

Total Construction Cost of Project:

Total Value of Mechanical/Plumbing Contract : _____
(*For Mechanical/Plumbing Subcontractors Only*)

Total Value of Electrical Contract : _____
(*For Electrical Subcontractors Only*)

Total Number of Change Orders on Project: _____

Total Value of Change Orders): _____

Original Scheduled Completion Date: _____

Time Extension Granted (number of days): _____

Actual Date of Completion: _____

2. Project Name: _____

Location: _____

Owner: _____

Owner Contact (name and *current* phone number): _____

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

Architect or Engineer of Record: _____

AOR or EOR Contact (name and *current* phone number): _____

Owner's Construction Manager (name and *current* phone number): _____

Description of Project, Scope of Work Performed: _____

Total Construction Cost of Project:

Total Value of Mechanical/Plumbing Contract : _____
(*For Mechanical/Plumbing Subcontractors Only*)

Total Value of Electrical Contract : _____
(*For Electrical Subcontractors Only*)

Total Number of Change Orders on Project: _____

Total Value of Change Orders): _____

Original Scheduled Completion Date: _____

Time Extension Granted (number of days): _____

Actual Date of Completion: _____

3. Project Name: _____

Location: _____

Owner: _____

Owner Contact (name and *current* phone number): _____

Architect or Engineer of Record: _____

AOR or EOR Contact (name and *current* phone number): _____

Owner's Construction Manager (name and *current* phone number): _____

Description of Project, Scope of Work Performed: _____

Total Construction Cost of Project:

Total Value of Mechanical/Plumbing Contract : _____
(*For Mechanical/Plumbing Subcontractors Only*)

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

Total Value of Electrical Contract : _____
 (For Electrical Subcontractors Only)

Total Number of Change Orders on Project: _____

Total Value of Change Orders): _____

Original Scheduled Completion Date: _____

Time Extension Granted (number of days): _____

Actual Date of Completion: _____

4. List two (2) current principle Trade Suppliers and three (3) current principle Trade Subcontractors:

Company	Material or Service Provided	Contact	Phone #
Supplier			()
Supplier			()
Subcontractor			()
Subcontractor			()
Subcontractor			()

District Use Only: Supplier - Reference Verification

Supplier/Subcontractor #1

Co. Name: _____ Spoke With: _____ Annual Volume: _____

Pd. at terms: Yes _____ No _____ Last usage date: _____ Ver. by _____ on _____

Comments: _____

Supplier/Subcontractor #2

Co. Name: _____ Spoke With: _____ Annual Volume: _____

Pd. at terms: Yes _____ No _____ Last usage date: _____ Ver. by _____ on _____

5. List experience record of staff:

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

Name	Position	Years With Firm	Experience

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

SECTION 6 - FINANCIAL INFORMATION

Reviewed or audited statements will be required for bidding on projects under \$10,000,000. **NOTE: A compilation is not acceptable.** ***Audited statements*** will be required for bidding on all construction projects of \$10,000,000 plus.

SPECIAL NOTE TO ACCOUNTANT: The attached Certificates of Accountant shall not be made by any individual who is the regular employ of the individual, partnership, joint venture, LLC, or corporation submitting the statement; nor by any individual who is a member of the firm with more than a ten percent (10%) financial interest.

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

(Exchange this page for the certificate of a licensed accountant for either a reviewed or audited financial statement.)

ACCOUNTANT'S RELEASE LETTER

By signing the form below, I authorize this pre-qualifying agency to contact our company's licensed accounting firm to verify our most recent audited or reviewed financial statement. I understand the financial statement is confidential information and is not open to public inspection.

Name Contractor's Signature

Title

Company Name

Date

Accounting Firm Name

Contact Name

Phone Number

Email Address

District Use Only: Verified by District by _____ on _____ by speaking with _____.
--

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

Exchange this page for all other appropriate attachments mentioned herein, such as financial statement, certificate of incorporation and minutes, etc., as well as any additional information you wish to add.

APPENDICES

ADDITIONAL INFORMATION

District Pre-qualification Standards

- (1) Contractor's Statement of Experience
- (2) Appropriate California Contractor's License
- (3) Contractor's Financial Condition and Bondability
- (4) Certificate of Insurance
- (5) Certificate of Licensed Public Accountant
- (6) Accountant's Release Letter

Only one (1) copy of the pre-qualification is required to be submitted. A new and current submittal shall be required each year by the anniversary date of initial qualification. A Contractor may also file new statements quarterly if there is substantial change in the Contractor's financial status, and a new rating based on the latest statement will be issued. In no case will pre-qualification remain in effect longer than one (1) year from the date of notice of pre-qualification. The District reserves the right to update or modify the Questionnaire at any time, which may result in a different Questionnaire being issued for any subsequent annual re-qualification. The following items must be provided or the pre-qualification submittal will not be accepted.

Financial Information

A. Audited & Reviewed Statement Requirements

Reviewed or audited statements will be required for bidding projects over \$1,000,000 and under \$10 million. Audited statements will be required for bidding all construction projects totaling \$10 million or greater. *Note: A compilation is not acceptable.*

B. Accountant's Certificate and Release

The certificate of a licensed Certified Public Accountant will be required in all cases. It will be acceptable for the accountant to submit a certificate in the accountant's own words. However, such qualifications shall not be so extensive as to nullify the value of the statement or its usefulness to the District.

Accountant's Release Letter will be required. PASO ROBLES JOINT UNIFIED School District will verify financial statement validity with responsible accountant.

C. Term of Financial Statements

A Contractor's financial information is valid until the date shown is more than twelve (12) months old. The District reserves the right to reject statements in which the financial information is more than twelve (12) months old. All applicable portions of the form should be completed with schedules attached if the space provided does not suffice.

Public Works Requirements

Projects estimated at \$1,000,000 or above require the successful completion of at least three (3) public works projects, specifically for school districts, including community college districts or

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

public university construction projects completed in the state of California in the last five (5) years.

Insurance

A minimum \$2,000,000 per occurrence and \$4,000,000 aggregate combined comprehensive single limit liability insurance is required for any project under \$5,000,000, and a minimum \$3,000,000 per occurrence and \$6,000,000 aggregate combined comprehensive single limit liability insurance is required for any project over \$5,000,000. A Certificate of Insurance must state levels and dates of coverage.

Bondability

The bonding surety is required to be an authorized surety in the state of California with an A.M. Best Key Rating of A:VII or better. It is required that the contractor includes a letter of bondability from the surety indicating their support levels.

In the event that a Contractor is unable to obtain a bond in the time prescribed by the District, the Contractor may be suspended from the qualified contractors list and not be allowed to bid on District projects until proof of bondability is provided.

NOTIFICATION OF PRE-QUALIFICATION RESULT

Contractors will be notified of their pre-qualification rating by fax or US mail, as well as posted to a list or prequalified contractors on the District's website. Notification will be made as soon as possible, but no later than 5 days prior to bid opening.

Completed pre-qualification forms must be submitted no later than **10 days prior to bid opening due date** (*in accordance with Public Contract Code 20111.6*).

SCORED INTERVIEW QUESTIONS

The following questions will be used to interview randomly selected contacts from at least two (2) completed projects. If you have performed projects for the District within the last five (5) years, District will interview the project and construction managers for the project for the two (2) most recently completed projects. The District will conduct the interviews. No action on the Contractor's part is necessary. These questions are included on the package given to the Contractor for information only.

The highest possible score on any single project is 100 points. An average score of less than 80 points disqualifies a Contractor from bidding on projects that are proposed by PASO ROBLES JOINT UNIFIED School District.

1. Are there any outstanding stop notices, liens or claims by the contractor that are currently unresolved on contracts for which notices of completion are recorded? (0 points if yes, 10 points if none) Yes_____ No_____
2. Was supervision sufficient during the execution of the project? (0 points if no, 10 points if yes) Yes_____ No_____

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

3. Did the contractor submit reports & other paperwork, including change order paperwork and scheduling updates in a timely manner? (0 points if no, 10 points if yes) Yes_____ No_____
4. Did the contractor finish the project on schedule? (0 points if no, 10 points if yes) Yes_____ No_____
- Did the contractor perform in a satisfactory manner on the following factors:
- a) Providing sufficiently experienced supervision over the project (0 points if no, 5 points if yes) Yes_____ No_____
 - b) Adequately staffing the project (0 points if no, 5 points if yes) Yes_____ No_____
 - c) Providing sufficient equipment the to perform the work in a timely manner on the project (0 points if no, 5 points if yes) Yes_____ No_____
 - d) Required supervision from owner (5 points if no, 0 points if yes) Yes_____ No_____
5. Were there any change orders on the project? (20 points if no, 0 points if yes) No____ Yes_____
- If yes, please respond to the following factors regarding the contractor's performance:
- a) Was the quality of the change order work satisfactory? (0 points if no, 5 points if yes) Yes_____ No_____
 - b) Did the contractor provide timely submission of cost and time estimates to perform change order work? (0 points if no, 5 points if yes) Yes_____ No_____
 - c) How well did the contractor integrate the change order work into the existing work? (0 points if inadequate, 5 points if adequate) Adequate_____ Inadequate_____
6. Did the contractor perform in the area of project close out, including turning in Maintenance & Operations manuals, completing as-built drawings, providing required training and completing warranty work in a timely and satisfactorily manner? (0 points if no, 10 points if yes). Yes_____ No_____
7. Did the contractor assert unilateral change orders and claims totaling more than 10% of the project value? (10 points if none, 0 points if yes) No_____ Yes_____
- If so, were the claims:
- a) Substantiated in whole or in part in the contractor's favor? (no points – information only) Yes___ No___
 - b) Resolved in a professional, orderly and timely manner? (5 points if yes, 0 points if no) Yes_____ No_____

APPEAL PROCESS

PROCEDURE FOR APPEAL OF PRE-QUALIFICATION RESULTS

Public Contract Code Section 20101(d) requires every public agency that requires prospective bidders to prequalify pursuant to this law to establish “a process that will allow prospective bidders to dispute their proposed pre-qualification rating prior to the closing time for receipt of bids.” The appeal process must include written notification by the public agency of the basis for the prospective bidder’s disqualification “and any supporting evidence that has been received from others or adduced as a result of an investigation by the public entity.” (Section 20101(d)(1).

PASO ROBLES JOINT UNIFIED SCHOOL DISTRICT PRE-QUALIFICATION QUESTIONNAIRE

The prospective bidder must be given an opportunity to rebut any evidence used as a basis for disqualification and to present evidence to the public entity as to why the prospective bidder should be found qualified.” (Section 20101(d)(2)).

If a Contractor appeals in writing the District’s decision to not pre-qualify him, the District will call to order a three-member appeal panel made up of Facilities Planning and Construction management/supervisory staff or any other staff deemed qualified by the District. The Contractor or his/her representative is invited to appear in person to bring before the appeal panel any additional or new information. It is advisable to ask your legal counsel to be in attendance or on call during the appeal. The panel advises the Contractor on the points where his/her questionnaire response has fallen below the minimum required number of points to qualify, and allows the Contractor to speak to the issues. The Contractor is then released from the meeting and the panel members come to consensus on whether or not to allow the Contractor to pre-qualify. The Contractor is faxed notification of the appeal panel’s decision at least 24 hours prior to bid opening.

A Contractor may update their school construction experience or financial information at any time without returning to the review panel since these amounts are not set by discretion. This option may be used once only, prior to a full pre-qualification package becoming due again.

If a clerical error or an error of omission is discovered after a Contractor is notified of the review panel’s results, the Contractor may submit the additional information. Staff may change the pre-qualification amounts for School Construction Rating or Financial Rating without returning to the panel.

Cal/OSHA Form 300 Example

Cal/OSHA Form 300 (Rev. 7/2007) Appendix A

Log of Work-Related Injuries and Illnesses

Attention: This form contains information relating to employee health and must be used in a manner that protects the confidentiality of employees to the extent possible while the information is being used for occupational safety and health purposes. See CCR Title 8 14300.29(b)(6)-(10)



Year 20____
Department of Industrial Relations
 Division of Occupational Safety and Health

You must record information about every work-related death and about every work-related injury or illness that involves loss of consciousness, restricted work activity or job transfer, days away from work, or medical treatment beyond first aid. You must also record significant work-related injuries and illnesses that are diagnosed by a physician or licensed health care professional. You must also record work-related injuries and illnesses that meet any of the specific recording criteria listed in CCR Title 8 Section 14300.8 through 14300.12. Feel free to use two lines for a single case if you need to. You must complete an Injury and Illness Incident Report (Cal/OSHA Form 301) or equivalent form for each injury or illness recorded on this form. If you're not sure whether a case is recordable, call your local Cal/OSHA office for help.

Establishment name _____
 City _____ State _____

Identify the person		Describe the case				Classify the case				Enter the number of days the injured or ill worker was:		Check the "Injury" column or choose one type of illness:						
(A) Case no.	(B) Employee's name	(C) Job title (e.g., Welder)	(D) Date of injury or onset of illness	(E) Where the event occurred (e.g., Loading dock north end)	(F) Describe injury or illness, parts of body affected, and object/substance that directly injured or made person ill (e.g., Second degree burns on right forearm from acetylene torch)	Using these four categories, check ONLY the most serious result for each case:				(K)	(L)	(M)						
						Death	Days away from work	Remained at work				Injury	Skin disorder	Respiratory condition	Poisoning	Hearing loss	All other illnesses	
						(G)	(H)	Job transfer or restriction	Other recordable cases	(J)	(K)	(L)	(1)	(2)	(3)	(4)	(5)	(6)
_____	_____	_____	month/day	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____ days	_____ days	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Page totals ➤ _____
 Be sure to transfer these totals to the Summary page (Form 300A) before you post it.

Injury
(1)
 Skin disorder
(2)
 Respiratory condition
(3)
 Poisoning
(4)
 Hearing loss
(5)
 All other illnesses
(6)