General Info				
Company Name:				
Phone:		Fax:		
Payment Address				
Add'l Info:				
Address:	· <u>· · · · · · · · · · · · · · · · · · </u>			
City:		State:	Zip:	
Country:				
Add'l Address:				
Purchase Address				
Address:				
City:		State:	Zip:	
Country:				
Add'l Address:	-			
Vendor Type				
Regular: □	Supplier:			
E mail Address:				
E-mail Address:				
Internet Address:				

Additional Info				
Organization Established:				
Organization Type:				
Incorporation Country:		State:		
Date of Registration:		Federal Tax ID:		
Office Type:				
Parent Organization				
Name:				
Address:				
City:	State	:	Zip:	
Country:				
Add'l Address:				
Other names / DBA:				
Trade Associations:				
•				
Qualified:				

Headcount					
Number of Employees			2 Year Turnover		
	Present	3 Year Avg.		Left	Joined
Executive Management:			Corporate Owners:		
Office Management/Staff:			Key Managers:		
Shop/Equip Mgmt/Staff:			PM's/Superintendents:		
Job Site Mgmt/Staff:					
Trades People:					
<u>Union</u>					
Shop Type:		_			

Technology	
Accounting/ Job Cost System Name of Vendor: First Installed: Current Version: Operating System: Database:	Project Management System Name of Vendor: First Installed: Current Version: Operating System: Database:
Project Scheduling System Name of Vendor: First Installed: Current Version: Operating System: Database:	Document Management System Name of Vendor: First Installed: Current Version: Operating System: Database:
Job Site Connectivity:	

Saf	ety							
<u>Highe</u>	st Ranking Safety Executiv	<u>ve</u>						
Nam	ie:				1	Γitle:		
Pho	ne:					E-Mail Addre	ess:	
Fax:	_							
Cert	ificates:							
	_							
Docu	mented Safety Meetings			Fre	quency - plea	ase circle on	e	
	For New Hires:	Once	Daily	Weekly	Bi-Weekly	Monthly	Quarterly	Annual
	For Field Supervisors:	Once	Daily	Weekly	Bi-Weekly	Monthly	Quarterly	Annual
	For Employees:	Once	Daily	Weekly	Bi-Weekly	Monthly	Quarterly	Annual
	For Subs/Vendors:	Once	Daily	Weekly	Bi-Weekly	Monthly	Quarterly	Annual
	A safety officer conducts s	safety inspection	ns on all	projects				Pre-Employment
	A safety officer conducts s	safety inspection	ns on al	projects				Pre-Employment
	Have implemented 100%							Random
	Can provide a site-specific		essing fa	all hazards	in your work			Periodic
	New Employee safety trai							Post Accident
	Employee Safety recognit							Reasonable Suspicion
	Disciplinary program for s	-						
	· ·							
	Workplace sexual harassi	_						
	Affirmative action plan for							
	Review the safety manage	ement system of	of subco	ntractors				
	Require employees to be	, ,	ect-speci	fic substand	ce abuse scre	ening		
	Written Safety program/po							
	Written disciplinary policy							
	Annual safety goals							
	Return to work/light duty p	orogram						

DSHA	
	Fatalities:
Year:	ERM:
Total Staff Hours:	Vehicle Accidents:
Total Trade Hours:	Vehicle Accident Cost:
Lost Days Cases:	Total Liability Loss:
Lost Days Rate:	OSHA Violations:
Injury Rate:	Willful Violations:
	Fatalities:
Year:	ERM:
Total Staff Hours:	Vehicle Accidents:
Total Trade Hours:	Vehicle Accident Cost:
Lost Days Cases:	Total Liability Loss:
Lost Days Rate:	OSHA Violations:
Injury Rate:	Willful Violations:
	Fatalities:
Year:	ERM:
Total Staff Hours:	Vehicle Accidents:
Total Trade Hours:	Vehicle Accident Cost:
Lost Days Cases:	Total Liability Loss:
Lost Days Rate:	OSHA Violations:
Injury Rate:	Willful Violations:

OSHA		- Continued
	Fatalities:	
Year:	ERM:	
Total Staff Hours:	Vehicle Accidents:	
Total Trade Hours:	Vehicle Accident Cost:	
Lost Days Cases:	Total Liability Loss:	
Lost Days Rate:	OSHA Violations:	
Injury Rate:	Willful Violations:	
	Fatalities:	
Year:	ERM:	
Total Staff Hours:	Vehicle Accidents:	
Total Trade Hours:	Vehicle Accident Cost:	
Lost Days Cases:	Total Liability Loss:	
Lost Days Rate:	OSHA Violations:	
Injury Rate:	Willful Violations:	
		

Qual	lity
Highes	t Ranking Quality Executive
Name	:
Title:	
Phone	e:
E-mai	Il Address:
Fax:	
Certif	ications:
Compa	ny Quality Programs/Policies
	Written quality policy
	Implemented a quality system
	Has LEED AP employees
# o	f LEED Professionals:
	Company has experience with LEED projects
# o	f LEED Projects:

Projects		
Largest Project Ever	Largest Project Last Year	
\$ Value of Work:	\$ Value of Work:	
Project Name:	Project Name:	
Customer:	Customer:	
Your Scope of Work:	Your Scope of Work:	
Year:	Year:	
Largest Project This Year	Preferred Project Size	
\$ Value of Work:	Indicate preferred project size (1-5) 1 being most preferred.
Project Name:	Under \$50K	\$3M - \$6M
Customer:	\$50K - \$100K	\$6M - \$10M
Your Scope of Work:	\$100K - \$200K	\$10M - \$15M
Year:	\$200K - \$500K	\$15M - \$25M
	\$500K - \$1M	\$25M - \$50M
	\$1M - \$3M	Over \$50M

Insurance						
Insurance Agency						
Agent/Broker:			Contact:			
Agent Name:			E-mail:			
Phone:			Years w/ Agent:			
Fax:						
<u>Address</u>						
Address:						
City:			State:	Zip:		
Country:						
Add'l Address:						
Workers Comp and Employer Carrier: Policy Form:	rs Liability	Policy Numbe Policy Period:		to		
	Current	Max Obt	ainable			
Each Accident:						
Disease Limit:		<u> </u>				
Disease/Employee:		_				
Limit:		<u></u>				
Professional Liability Insurar	<u>ice</u>					
Carrier:			Policy Period:		to	
Policy Form:			Deductible:		Tail Yrs:	
Policy Number:			Project Limit:		Prior Acts:	

Liability			
Commercial General Liability		Current	Max Obtainable
Carrier:	General Aggregate:		
Policy Form:	Products Comp/Op:		
Policy Number:	Personal Adv/Injury:		
Policy Period: to	Each Occurrence:		
# of Claims Made:	Medical Expense:		
Exclusion to standard CGL	Fire Damage:		
	Deductible:		_
	Per Project Limit □		
Excess Liability		Current	Max Obtainable
Carrier:	Aggregate:		
Policy Form:	Each Occurrence:		
Policy Number:			
Policy Period: to			
Туре:			
# of Claims Made:			
Automotive Liability		Current	Max Obtainable
Carrier:	Combined Limit:		_
Policy Form:	Bodily Per Accident:		
Policy Number:	Bodily Per Injury:		
Policy Period: to	Property Damage:		

Financial		
D & B Information	Bank Information	
D&B Number:	Bank Name:	
D&B Rating:	Branch:	
D&B Pay Record:	Contact:	
Date of Rating:	Phone:	
	Fax:	
<u>Financial Information</u>	E-mail:	
Revenue Year:	Years With Bank:	
Revenue Amount:	Line of Credit Total:	
Net Income:	Line of Credit Avail:	
Net Equity:	Line of Credit Exp:	
Working Capital:		
Average Employees:		
Expected Volume:		
Expected # Projects:		
Current Backlog:		
Bank Address		
Address:		
City:	State: Zip:	
Country:		
Add'l Address:		
<u>Liquidated Damages</u>		
☐ Have been assessed liquidated damages for I	late completion of a project (see notes for details).	

СРА						
CPA Firm Information						
Firm Name:						
Contact:				_		
Phone:						
Fax:				_		
E-mail:						
Years With CPA:				<u></u>		
Financial Statements:	Audited	Reviewed	Other		_	
CPA Address						
Address:						
City:				State:	Zip:	
Country:						
Add'l Address:						
			·			

Surety Company Information			
Surety Name:	Years with Surety:		
Surety Broker Name:	—— Bonding Capacity:		
Contact:	Capacity per Job:		
Phone:	Last Bond Date:		
Fax:	Last Bond Amount:		
E-mail:	Last Bond Rate:		
Surety Company Address			
Address:			
City:	State:	Zip:	
Country:			
Add'l Address:			
Additional Bond Information Surety had to finish project(s) - See notes for dates/det Explanatory Notes:	ails		

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Local .rpt

Role	Birth Year Ownership %
	Role

Contacts		
	Bid Contact:	Role Years:
	Contact Type Code:	 Phone:
	Contact Type Desc:	Cell:
	Name:	Fax:
	Title:	E-mail:
	Company Years:	
	Preferred Method:	
	Bid Contact:	Role Years:
	Contact Type Code:	 Phone:
	Contact Type Desc:	 Cell:
	Name:	 Fax:
	Title:	 E-mail:
	Company Years:	
	Preferred Method:	
	Bid Contact:	Role Years:
	Contact Type Code:	 Phone:
	Contact Type Desc:	 Cell:
	Name:	 Fax:
	Title:	 E-mail:
	Company Years:	
	Preferred Method:	
	Bid Contact:	Role Years:
	Contact Type Code:	 Phone:
	Contact Type Desc:	 Cell:
	Name:	 Fax:
	Title:	 E-mail:
	Company Years:	
	Preferred Method:	

Contacts		
	Bid Contact:	Role Years:
	Contact Type Code:	Phone:
	Contact Type Desc:	Cell:
	Name:	Fax:
	Title:	 E-mail:
	Company Years:	
	Preferred Method:	

States

Country	State	License	Expiration	Sales Tax #	Unemployment Information #
					-
				-	

Scope /Pha	se		
	Scope Code:		
	Scope Code Desc:		
	Phase Code:		
	Phase Code Desc:		
	Self Performed:		
	Prior Work %	Planned Work %	
	No Prior Work:		
	Scope Code:		
	Scope Code Desc:		
	Phase Code:		
	Phase Code Desc:		
	Self Performed:		
	Prior Work %	 Planned Work %	
	No Prior Work:		
	Scope Code:		
	Scope Code Desc:		
	Phase Code:		
	Phase Code Desc:		
	Self Performed:		
	Prior Work %	 Planned Work %	
	No Prior Work:		
	Scope Code:		
	Scope Code Desc:		
	Phase Code:		
	Phase Code Desc:		
	Self Performed:		
	Prior Work %	 Planned Work %	
	No Prior Work:		

Scope /Phase			- Continued
Scope Code:			
Scope Code De	sc:		•
Phase Code:			
Phase Code De	sc:		
Self Performed			•
Prior Work %		Planned Work %	
No Prior Work:			•

Regions				
Region Code	Region Desc	Prior Work %	Planned Work %	No Prior Work

Projec	t Types				
	Project Type Code	Project Type Description	Prior Work %	Planned Work %	No Prior Work
				_	

Unions			
	Local Number	Name	Expiration
		_	

References				
	Reference Type Code:			
	Reference Type Desc:			
	Contact:			
	Company:			
	Address:			
	City:	State:	Zip:	
	Country	Phone:		
	E-mail:	Fax:		
	Notes:			
				_
	Reference Type Code:			
	Reference Type Desc:			
	Contact:			
	Company:			
	Address:			
	City:	State:	Zip:	
	Country	Phone:		
	E-mail:	Fax:		
	Notes:			
				_
	Reference Type Code:			
	Reference Type Desc:			
	Contact:			
	Company:			
	Address:			
	City:	State:	Zip:	
	Country	Phone:		
	E-mail:	Fax:		
	Notes:			_

References				- Continued
	Reference Type Code:			
	Reference Type Desc:			
	Contact:			
	Company:			
	Address:			
	City:	S	tate:	Zip:
	Country	P	hone:	
	E-mail:	F	ax:	
	Notes:	_		
	Reference Type Code:			
	Reference Type Desc:			
	Contact:			
	Company:			
	Address:			
	City:	S	tate:	Zip:
	Country	P	hone:	
	E-mail:	F	ax:	
	Notes:			

al
Has your company or any if its principals ever petitioned for bankruptcy, failed in business, defaulted, or been terminated on a contract awarded? If yes, check here and enter explanatory notes.
Have any of the owners, officers, or major stockholders of your company ever been indicted or convicted of any felony or other criminal conduct? If yes, check here and enter explanatory notes.
Has your company or any of the owners, officers, or major stockholders ever been suspended, disbarred, or otherwise precluded from persuing public work or ever been found to be non-responsive to a public agency? If yes, check here and enter explanatory notes.
Has your company ever had a claim made against it for improper, delayed, defective, or non-compliant work or failure to meet warranty obligations? If yes, check here and enter explanatory notes.
Is your company or any of the owners, officers, or major stockholders involved in any arbitration or litigation? If yes, check here and enter explanatory notes.
Does your company have any outstanding judgements or claims against it? If yes, check here and enter explanatory notes.
Has your company or any of the owners, officers, or major stockholders ever been investigated for, or charged with, alleged labor law violations including alleged violations of Immigration Control and Reform Act; state or local laws regarding employment of immigrants; prevailing wage laws; wage and hour laws or other federal, local, or state labor laws? If yes, check here and enter explanatory notes.

Certificates	
Certificate Type:	
Description:	
Certificate:	
Agency:	
Expiration Date:	
Certificate Type:	
Description:	
Certificate:	
Agency:	
Expiration Date:	
Certificate Type:	
Description:	
Certificate:	
Agency:	
Expiration Date:	
Certificate Type:	
Description:	
Certificate:	
Agency:	
Expiration Date:	
Certificate Type:	
Description:	
Certificate:	
Agency:	
Expiration Date:	

N	ot.	Δ

Signature Page

We have attempted to answer all questions in a full and complete manner to assure that our answers are not in any respect misleading, either by expressing ourselves in a misleading or ambiguous manner or omitting information. We recognize that [N/A] will be relying on the accuracy of the information and our responses in this questionnaire in deciding whether to permit us to bid and to award work to our Company.

Name of Company:		
Completed By:		
Title:		
Date:		