

INSTRUCTIONS AND CHECKLIST FOR COMPLETING THE CITY OF MEDFORD PREQUALIFICATION APPLICATION

To be eligible to bid City of Medford public improvement projects and to work in the public right of way within the City of Medford, an application must be **completed in its entirety and received at least 5 days** prior to your first anticipated bid opening date.

Prior to starting work in the right of way all contractors are required to have a current, approved prequalification application on file with the City of Medford Public Works Engineering.

KEEP THIS CHECKLIST FOR YOUR RECORDS.

Forms and instructions may be obtained at: <http://www.ci.medford.or.us>. Select City Hall/City Departments/Public Works/Prequalification Information & Forms.

BEFORE MOVING ON TO PAGE 1 OF THE APPLICATION, PLEASE PRINT THIS PAGE AND USE WHEN FILLING OUT YOUR APPLICATION TO ENSURE COMPLETION IN ITS ENTIRETY.

GENERAL INFORMATION

- **All pages and sections must be completed and correct.** If not, the application will be returned by mail to the applicant for correction.
- If accepted, an approval letter will be sent.
- The correct form must be submitted. Outdated forms or pages will not be accepted.
- An original signed application must be sent. Copied or faxed signatures will not be accepted.
- Prequalification is required for **all contractors working in the public right of way.**
- **If a section does not apply, enter "n/a."**

Page 1

- A. Mark your business structure.
- B. Provide your physical address for courier use.
Provide your mailing address, phone, fax number and business e-mail address.
- C. Mark the purpose(s) of your application and the first anticipated bid opening date.

Page 4-5

Section 1, Classes of Work:

Complete information on each class of work for which you have demonstrated the experience in Sections 11-12. This experience may be your own work force or through project management of subcontractors. List all other states where applicant is currently qualified or has been qualified in the last three (3) years. **Please note that the City of Medford requires dollar amounts for each class of work you are requesting to be prequalified in.**

Page 6-7

Section 2, Bonding: Indicate the total amount of work (in dollars) you can be bonded for at any one time.

Section 3, Bid and Performance Bonds:

Provide requested information on the agent and surety company you **expect** to provide bonds. If you make a change in your surety company during the year you must notify the City of Medford – Engineering Division.

Sections 4-9, as applicable, Business Structure: If you have an assumed business name you must complete Section 8.

Page 8

Section 10, Equipment:

(A) An attachment can be included if it contains all requested information. Mark "See Attachment."

(B), (C), & (D) You must complete these questions.

Pages 9-11

Section 11-12, Experience:

An attachment can be included if it contains all requested information, including City of Medford classes of work. Mark "See Attachment."

Section 13-14, Experience (cont):

You must complete these sections.

Section 15, Licenses and Registrations:

Please read this section carefully and provide all requested information.

Section 16, Space for additional information:

Pages 12

Section 17, Ownership and Control:

Complete (a), (b), and (c)

Section 18, Check one box

Page 13

Section 19, Answer each question

Section 20, Contact person

Section 21, Affidavit: Signature must be of an individual who is authorized to execute bids and contracts.

The affidavit must be notarized.

Mail Application to:

City of Medford – Engineering Division
411 W. 8th Street - Modulares
Medford, OR 97501

Questions? Call 541-774-2100



PUBLIC WORKS DEPARTMENT
ENGINEERING & DEVELOPMENT DIVISION

CITY OF MEDFORD
200 S. IVY STREET
MEDFORD, OREGON 97501

TELEPHONE: (541) 774-2100
FAX: (541) 774-2552

CONTRACTOR'S PREQUALIFICATION APPLICATION

Application of:

(Contractor's Registered Company Name)

- ☐ Individual Sole Proprietorship
- ☐ General Partnership
- ☐ Corporation
- ☐ Joint Venture (JV)
- ☐ Member of Joint Venture
- ☐ Limited Liability Company (LLC)
- ☐ Limited Liability Partnership (LLP)
- ☐ Limited Partnership (LP)
- ☐ Assumed Business Name (ABN)

Address to which all correspondence should be mailed:	
Physical Address:	
PO Box:	
City, State, Zip:	
Phone No.:	
Fax No.:	
Email Address:	
Application Date:	

This Prequalification application is submitted for the following Purpose: (Check One)

<input type="checkbox"/>	This is a prequalification application for the:
	(Name of Project)
	Scheduled Bid Opening Date:
<input type="checkbox"/>	Local Government Project
<input type="checkbox"/>	State Government Project

<input type="checkbox"/> This is a prequalification application for such period of time as designated by the mandatory prequalification rules adopted by the Public Contracting Agency.	
City of Medford Business License No.	
CCB License No.	
Expiration Date:	

NOTICE

Although the Department of Administrative Services (DAS) now prescribes the prequalification format, DAS will not accept or evaluate the applications.

Prequalification applications are to be submitted to the public contracting agency to which you will be bidding.

INSTRUCTIONS

INTRODUCTORY STATEMENT:

In accordance with the statutes of the State of Oregon, every public contracting agency contemplating receiving bids for and awarding any contract for a public improvement may require any prospective bidder (herein referred to as applicant) to submit a full and complete statement concerning their equipment and experience in constructing public improvements.

The application and questionnaire forms which are bound herewith comply with the requirements of public contracting rules and must be used in determining the qualifications of applicants and in assigning limits as to the size and kinds of projects for which the applicant may submit bids.

The applicant should use care and integrity in preparing this information. The public contracting agency may make independent inquiries concerning the contractor's past performance and/or capabilities.

Manner of Preparing and Filling in Forms:

This application shall include equipment and experience information for only the specific single business organization or entity which is applying for prequalification and which would be the signatory on a contract with the public contracting agency.

All answers and other entries on the forms, except signatures, should be filled in on a typewriter or printed. To make this possible, the forms may be taken apart by removing the staples by which they are bound. It shall be the responsibility of the applicant to return all pages whether applicable or not. Failure to do so may be grounds for rejection.

All answers and entries shall be specific and complete in detail.

The prequalification application shall be signed by the applicant and sworn to as the form indicates. The signatory of the statement guarantees the truth and accuracy of all statements and of all answers to questions.

An original signed application must be sent to the public contracting agency (Xerox or fax signatures will not be accepted)

Use of Attachments:

Schedules, reports and other forms of prequalification statement may be used as attachments to the prescribed form, provided that the information contained therein specifically includes the information required by this form.

Place of Submission:

Prequalification applications shall be submitted to the designated officer of the public contracting agency.

Time of Submission:

Each Public Contracting Agency may have specific time requirements for filing applications. The applicant should check with the designated officer of the applicable agency for submission time.

Appeal Due to Denial or Revocation of Prequalification:

In case the applicant's application for prequalification is denied or in case an existing prequalification is revoked, the applicant may appeal the denial or revocation in accordance with the rules adopted by the Department of Administrative Services or the appropriate local contract review board.

Notification of Action Taken:

The applicant will be notified, in writing, of the action on their application. Applicant will then be allowed to bid on such projects as are within the limits of size and kind of work for which applicant has been declared qualified.

Period during which a Qualified Applicant Remains Qualified:

An applicant who has been notified of prequalification for projects of a given size and kind will usually remain qualified until the date specified in the notification. The public contracting agency may limit prequalification approval to individual public improvement projects. Unless such applicant is otherwise notified by the public body the applicant will be permitted to submit bids for any and all projects of said kind and size for which bids are to be received. The public body may from time to time require new or revised prequalification applications and have them approved prior to allowing a bid.

Requirement of Continuing Prequalification:

Applicants who have once been qualified with an agency requiring prequalification and who desire to maintain an uninterrupted prequalification standing are required to submit a new application periodically as required by such agency. Uninterrupted prequalification is contingent upon favorable action on the application. A prequalification may be revoked under the provision of ORS 279.029.

Changes:

Requests for revision of the prequalification standing of any applicant will be considered whenever the applicant can make a showing of materially improved ability, but not more often than once in three months. Major changes must be submitted with a new prequalification application. If the changes are minor, such changes may be requested to the public contracting agency. Minor changes involve, but are not limited to, company name, adding or deleting classes of work. Contact Public Contracting Agency for specific procedures when there are changes to the information submitted in the application.

With or without a request from a prequalified applicant, the prequalification limitation on class of work or size of project MAY be reviewed and increased or decreased as found appropriate. The prequalified applicant will be notified in writing of any such revision.

Joint Venture:

A public contracting agency may adopt special requirements concerning joint ventures. Before submitting a joint venture application, an applicant should ascertain if special instructions are applicable and obtain them from the designated public officer.

PLEASE ANSWER EACH SECTION AND QUESTION IN THE APPLICATION. FAILING TO DO SO, THE APPLICATION WILL BE RETURNED FOR COMPLETION.

- 1** PLEASE FILL IN THE CLASSES OF WORK YOU WISH TO BID WORK ON. CLASSES OF WORK INCLUDE, BUT ARE NOT LIMITED TO, WORK LISTED IN PARENTHESIS.

For Each Class of Work.

- A Enter the maximum dollar amount of work you are capable of performing.
- B Enter the maximum dollar amount of work you are qualified to undertake in other states.
- C Enter the state(s) qualified for the amount shown in column 'B'.
- D Enter the number of years of experience in this class of work.

***** If more space is required, attach additional sheets. *****

(Highways, Roads, Streets, Airports)

Class	A. Max dollar amount	B. Qualified Dollar Amount	C. State(s) Experience	D. Years Experience
Aggregate Bases	_____	_____	_____	_____
Asphalt Concrete Paving and Oiling	_____	_____	_____	_____
Bridges and Structures (Concrete, Steel, and Timber Bridges, Retaining Walls and Soundwalls; Seismic Retrofit; Box Culverts; Structural Plate Pipe, and Pipe Arches)	_____	_____	_____	_____
Buildings (Toilets, Bathhouses, Maintenance, Sand Sheds)	_____	_____	_____	_____
Earthwork and Drainage (Cleaning, Earthwork, Blasting, Riprap, Culverts, Manholes, Inlets)	_____	_____	_____	_____
Illumination	_____	_____	_____	_____
Landscaping (Roadside Seeding, Lawns, Shrubs, Trees, Irrigation Systems, Topsoil, temporary and permanent Erosion Control)	_____	_____	_____	_____
Miscellaneous Highway Appurtenances (Guardrail, Barrier, Curbs, Walks, Fences, Protective Screening, Impact Attenuators, Cold Plane Pavement Removal)	_____	_____	_____	_____
Painting (Bridges and Buildings)	_____	_____	_____	_____

Class	A. Max dollar amount	B. Qualified Dollar Amount	C. State(s) Experience	D. Years Experience
Pavement Markings (Permanent-Painted, Durable, Markers, Delineators)				
Portland Cement Concrete Paving				
Rock Production (Aggregate Crushing, Sanding Rock)				
Signing (Permanent)				
Temporary Traffic Control (All Temporary Traffic Control items including Flaggers and Pilot Cars)				
Traffic Signals				
Building Construction				
Demolition and Related Excavation and Clearing				
Drainage				
Electrical Wiring				
Municipal Street Construction				
Sewer Construction				
Sewage Pumping Station				
Sewage Treatment Plant				
Plumbing				
Other (List Specific Class)				

2 Indicate the total amount of work, expressed in dollars, which the applicant can be bonded for at one time:
\$ _____

3 BID AND PERFORMANCE SURETY BONDS:

If the contract(s) for which this prequalification is sought require bid and performance bond(s), the applicant shall state the name of the agent and name, address and telephone number of the surety company applicant expects to provide the bonds.

Agent's Name: _____
Agent's Address: _____
Agent's Telephone #: _____
Surety Name: _____
Surety Address: _____
Surety Telephone #: _____

4 If an Oregon corporation, complete this section:

When Incorporated: _____

President: _____

1st Vice President: _____

Secretary: _____

Treasurer: _____

What officers are authorized to execute contracts:

(Additional documentation may be required by the public contracting agency.)

5 If a general partnership, complete this section:

Date of Organization: _____

If a foreign (out of State) co-partnership or persons engaging in business in the state under an assumed name, but not domiciled within this state, state whether or not such partnership or business organization has been registered as may be required in compliance with Chapter 648, Oregon Revised Statutes.

Name and address of partners:

6 If a foreign (out of State) corporation, complete this:

When incorporated: _____

In what state: _____

Date of authorization to transact business in the State of Oregon: _____

Has applicant filed with the Department of Revenue forms required by ORS 279.021? Yes ☐ No ☐

President: _____

1st Vice President: _____

Secretary: _____

What officers are authorized to execute contracts:

(additional documentation may be required by the public contracting agency)

Name and address of registered agent in Oregon:

7 If a limited liability company, limited liability partnership or a limited partnership indicate below:

Check One: ☐ Limited liability company
☐ Limited liability partnership
☐ Limited partnership

Have you registered with the State Corporation Division, Business Registry? ☐ Yes ☐ No

Name and address of organizer:

List who is authorized to execute contracts:

(Additional documentation may be required by the public contracting agency)

8 If doing business under an assumed business name, fill out the following information:

Name of assumed business: _____
Owner's name and address: _____
Registration date: _____ Expires: _____

9 If doing business as a sole proprietorship, fill out the following information:

Individual's name liable for all obligations of business: _____
If you are a sole proprietor using an assumed business name, please list name: _____
Registration date: _____ Expires: _____

Applicant's Equipment Questionnaire

(A) Plants and equipment owned by the applicant: List only major items. Lump together small equipment and tools.

[illegible]

(B) Total market value of equipment: \$ _____

(C) Does applicant intend to rent equipment? If so, provide a general description: _____

(D) Where available? _____

Applicant's Experience Questionnaire

List major projects applicant has undertaken in the last five years. (List most recent projects first)

Name and Address of Owner	Name of Project	Class of Work	Contract Amount
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			

Applicant's Experience Questionnaire - Continued

List the following additional information for projects listed under Item 11 –
(Use same line No. as in opposite page)

Date of Completion (If completed)	Location of Work	*	Surety Company if Project Bonded	Architects or Engineering firms **
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				

* Indicate whether: (P) Prime Contractor, (JM) Joint Venture, (Sub) Subcontractor.

** Indicate name, address and phone number including area code.

13

Applicant's Experience Questionnaire - Continued

- A. How many years has applicant been in business under present name?
 As a prime contractor? _____ As a subcontractor? _____
- B. How many years' experience in construction work has applicant had:
 As a prime contractor? _____ As a subcontractor? _____

14

What is the construction experience of all owners, officers, partners and principal individuals in applicant's organization? Also list any other individuals or organization who, in any way and to any extent, controls or influences the bidding.

Individual's Name	Present Position or Office	Years of Construction	Magnitude and Type of Work	In What Capacity

15

Indicate contractor's licenses or registration numbers held as required by Oregon Statutes:

Corporation Division Registration No.	
Construction Contractors Board No.	
Landscape Contractors License No.	
Electrical License No.	
Plumbing License No.	
Pressure Vessel Installers License No.	
Other License No.	
City of Medford Business License No.	

16

Following space may be used for general remarks and explanations pertaining to the foregoing prequalification statements: (Also explain here any experience claimed which is that of a business organization or entity, other than the applicant, including a business entity superseded by the applicant).

17 OWNERSHIP AND CONTROL

- (a) List any organization, owned or controlled by the applicant, its officers, directors, partners and anyone owning at least 10% interest in the firm, or in which the applicant was or is an officer, director, partner, doing business in Oregon under another name. If none, so state.
- (b) List those individuals, companies or corporations owning 10% or more of applicant's firm.
- (c) List all other personnel in applicant's organization who have a financial interest in or serve as officers or partners in another firm prequalified to bid in this or another state.

Individual's Name	Present Position or Office	Other Firm or Firms	Position in Other Firm(s)	State of Other Firm

18 Is your firm currently certified by the State of Oregon as a Disadvantaged Business Enterprise (DBE)?

(Check one)

☐ Yes
 ☐ No

19

- (a) Have you ever been denied prequalification by any state, local or federal agency in this or any other state?
(Check one) ☐ Yes ☐ No If yes, please explain: _____
- (b) Have you ever been debarred from bidding on contracts by any state, local or federal agency in this or any other state under any State Law or Federal Law?
(Check one) ☐ Yes ☐ No If yes, please explain: _____
- (c) Has any officer or partner of the applicant ever applied for prequalification with the public contracting agency under a different name?
(Check one) ☐ Yes ☐ No If yes, please explain: _____
- (d) Has the applicant ever failed to complete a state, local or federal public improvement (works) contract?
(Check one) ☐ Yes ☐ No If yes, please explain: _____
- (e) Has any officer or partner of the applicant ever been found in breach of a local, state or federal contract?
(Check one) ☐ Yes ☐ No If yes, please explain: _____

20

Name of contact person for information regarding this application _____

21

AFFIDAVIT:

STATE OF _____)
County of _____) SS.

I, _____ being first sworn, state that I am
_____ of the applicant herein and that the statements made in this
(Title)
application are true and I acknowledge that any false, deceptive or fraudulent statements on the application or at a hearing will result in the denial of prequalification, and may subject me to charges of false swearing or perjury; should there be any subsequent material reduction in applicant's ability to carry out any project for which applicant desires to submit a bid; applicant will give written notice of such change to the designated officer to whom this application is submitted at least ten days prior to the bid opening and that it is understood that such notice may change the eligibility of applicant to submit the bid.

(Original Signature) (Title)

Subscribed and sworn to before me this _____ day of _____, Year _____

Notary Seal
or
Stamp

Original Notary Public Signature

My commission expires: _____