



**SUBCONTRACTOR &
VENDOR STATEMENT**

**QUALIFICATIONS
BID & PROCUREMENT LIST**

EVEREST HAS NEVER FAILED TO COMPLETE ANY WORK AWARDED

Everest Group, Inc., in an effort to understand your company's capabilities and to create a bid list we request that every subcontractors and supplier complete the form prior to bidding on any of our projects. The questionnaire is confidential and used to determine your firm's credentials, work experience, project capacity, and reputation for work. We trust that you will see this request not as an invasion of your business's privacy, but as an effort to make sure that we have drawn together subcontractors and vendors who will embrace professionalism. We believe successful construction projects are not created by chance but through team work/efforts championing skill, integrity and responsibility.

This statement must be updated annually and a letter requesting this will be sent and must be completed. Like our policy of zero tolerance on horseplay at jobsites we require all forms and paperwork to be completed.

General:

Legal: _____

DBA: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

Years in Business: _____ Federal Employer ID: _____ Sales Tax No: _____

Website: _____

Principals/Owners with titles: _____

Organization:

Company Type: _____

Primary Market(s) Served: _____

Geographic Work Area: _____

Location of additional offices: _____

Classification: _____ Labor Affiliation: _____

Equal Employment Opportunity Status: _____

If minority, which one: _____

Current number of employees: Office _____ Field _____ Shop _____

Principal Contact: _____ Title: _____

Phone: _____ E-Mail: _____ Cell: _____

Estimating Contact: _____ Title: _____

Phone: _____ E-Mail: _____ Cell: _____

Office Contact: _____ Title: _____

Phone: _____ E-Mail: _____ Cell: _____

Name of Parent Company: _____

Parent Company Address: _____

Subsidiaries of Company: _____

Subsidiaries Address: _____

Trade Association Memberships: _____

Trade Association Awards: _____

Training Programs/Accreditations earned or acquiring (craft and management) employee names and designations: _____

Work:

Division of Work Performed / Materials Supplied / CSI Code:

Typical Project Value: _____

Provide Project Name & Location, Contract Value, General Contractor Company Name, Contact, Phone

Largest Project completed or in progress: _____

Three Recent Projects:

1. _____

2. _____

3. _____

What portion(s) of your work is subcontracted to others? _____

Total Number of Projects in Progress _____ Total Contract Value _____

Current Backlog Value _____

If you are submitting this prequalification statement to bid on a specific project, what is the name and location of the project? _____

Financial:

Dunn & Bradstreet Number: _____ Current D & B Rating: _____ Paydex Rating: _____

Remarks: _____

Have you ever sold your receivables? Yes ___ No ___ If yes, to whom and for what purpose?

Name of your bank: _____

Address: _____

Contact person: _____ Phone: _____

Line of Credit: _____ Unused Portion: _____

Exp. date: _____

Bonding:

Surety Company: _____

Broker: _____

Contact Person: _____ Phone: _____

Bonding capacity: _____ Bonding Rate: _____

Date, amount and type of last bond issued: _____

Safety:

If the answer to any of the questions below requests details, then please attach.

Please list your firm's Workers' Compensation Experience Modifier Rating (EMR) for:

Current year _____ Prior year _____ Two years ago _____

Does your company have a full time Safety Manager/Coordinator? Yes ___ No _____

Has your firm had a job site fatality in the last three (3) years? Yes ___ No ___ If yes, please explain in detail.

Has your firm had any OSHA Citations in the last three (3) years? Yes ___ No ___ If yes, please explain in detail.

Does your Company have a written SAFETY Program covering the scope of your operations?

Yes ___ No

Insurance:

Broker: _____

Contact: _____ Phone: _____

Years with Broker: _____

General Liability Limit: _____

Workers Compensation Limit: _____

Professional Liability Limit: _____

Umbrella Liability Limit: _____

Automobile Liability Limit: _____

Sustainability:

Participated on a LEED Certified Project: _____

How many LEED Certified Projects: _____

Which LEED Rating System Was Utilized: _____

Level(s) of Project Certifications Achieved: _____

Did your firm perform design? _____

Did your firm perform Material Selection? _____

Participate in a Commissioning Process: _____

Contact Responsible for Data/Documentation Collection: _____

How many LEED Accredited Professionals Employed by your firm: _____

Participated on a Project Certified by an Organization other than the USGBC/GBCI? _____

If yes, what rating system was utilized? _____

References:

Provide Company Name, Contact, Phone, email

List four major suppliers:

1. _____

2. _____

3. _____

4. _____

List four General Contractors you do business with:

1. _____

2. _____

3. _____

4. _____

Legal:

If the answer to any of the questions below is yes, then please attach details.

Has your organization ever failed to complete any work awarded to it? No ___ Yes ___

Are there any judgments, claims, liens, arbitrations/mediation proceedings, or lawsuits pending or outstanding against your company or its officers? No ___ Yes ___

Has your organization been a party to any lawsuits or requested arbitration/mediation proceedings with regard to construction contracts or construction defect claims within the last five years? No ___ Yes ___

Signature _____ Date _____

SUBCONTRACTOR STATEMENT

THE FOLLOWING MUST BE PROVIDED FOR CONSIDERATION AND MUST ALSO BE PROVIDED ANNUALLY

1. **A letter from your Surety** (*we are not asking for a bond*) outlining the single project and aggregate amounts they will issue a payment and performance bond for to your company.
2. **A current certificate of insurance on the ACORD form**
3. **A copy of your latest (consolidated) financial statement, (i.e., Balance Sheet, Income Statement, etc.), prepared by an accounting firm(Audited, Reviewed, or Complied) AND a copy of your most recent internal financial statement.**
4. **Certificate evidencing minority status (if applicable).**
5. **OSHA 300A Log.**
6. **Documentation evidencing current EMR.**
7. **Submit Bank Reference Questionnaire to your Bank for Completion.**

Please be assured your financial information will be kept confidential and will be used solely to determine your firm's qualification for Everest Construction Group projects. Your prequalification status *cannot* be determined until this statement is accurately completed, and the above information is received.

SIGNATURE & NOTARIZATION:

Dated on this _____ day of _____, 20_____.

Organization's Name: _____

By: _____

Name: _____ Title: _____

STATE OF _____

COUNTY OF _____

_____, being duly sworn deposes and says that the information provided herein is true and sufficiently complete so as not to be misleading. Subscribed and sworn before me this _____ day of _____, 20_____.

Notary Public's Signature _____

My commission Expires: _____

(seal)

DO MARK CONFIDENTIAL & SUBMIT ORIGINALS BY MAIL TO:

Everest Group, Inc., Attn: Chris Robertson 5307 E. Mockingbird Ln. Ste. 523 Dallas, TX 75206
Direct questions email: chrisr@everestconstructiongroup.com

BANK REFERENCE QUESTIONNAIRE

FROM: _____

TO: _____ Company Bank Employee Name

Address, City, State, Zip _____

Name of Bank: _____

How long has customer been banking with you? _____

Does the above company have any loans with your bank? ___Yes___No

If yes, are payments current and made on time? ___Yes___No

What is the current line of credit available? \$ _____

What is the average monthly balance in their checking account: \$ _____

Name and Title Company Officer: _____

Signature: _____ Date: _____

Name of Bank Representative and Title: _____

Signature: _____ Date: _____

Please return this form to: **PLEASE DO MARK CONFIDENTIAL**

Everest Group, Inc.

ATTN: Chris Robertson

5307 E. Mockingbird Ln. Ste. 523

Dallas, TX 75206

Phone: 214-999-9399