



by Colbi Technologies

## Instructions for Contractors: Bid Pre-Qualification

**Quality Bidders is an online pre-qualification service for California school districts that allows contractors to submit applications to become a pre-qualified bidder for a district's formally-bid projects or register to receive invitations to bid on informally-bid CUPCCAA projects.**

California school districts may require contractors to submit a standardized questionnaire and financial statements to determine if they're qualified to bid. Contractors must declare, under penalty of perjury, that submitted information is true. Submitted questionnaires and financial statements **are not public records and shall not be open to the public.\***

**Public Contract Code 20111.5** enables districts to require prime contractors to be prequalified prior to accepting bids.

**Public Contract Code 20111.6** requires the district to do so for certain projects. This applies to prime contractors and MEP sub-contractors with the following licenses:

- General Contractors (A and B)
- Mechanical, Electrical and Plumbing subcontractors (C-4, C-7, C-10, C-16, C-20, C-34, C-36, C-38, C-42, C-43, and C-46)

Refer to the district's instructions to bidders for required pre-qualification submittal timelines. Reference:  
<http://leginfo.legislature.ca.gov/>

**To get started, please review the following instructions.**

**Sign-up**

**Create Apps**

**Contact Info**

**Submit Apps**

**Manage Apps**

### Formal and Informal Bids

Quality Bidders offers two types of pre-qualification: **formally bid** projects and **informally bid** projects of \$200,000 or less.

### Bid Pre-Qualification Apps

Pre-qualification applications for formally bid contracts require submission of a questionnaire, supporting documents, and financial statements.

### CUPCCAA Apps

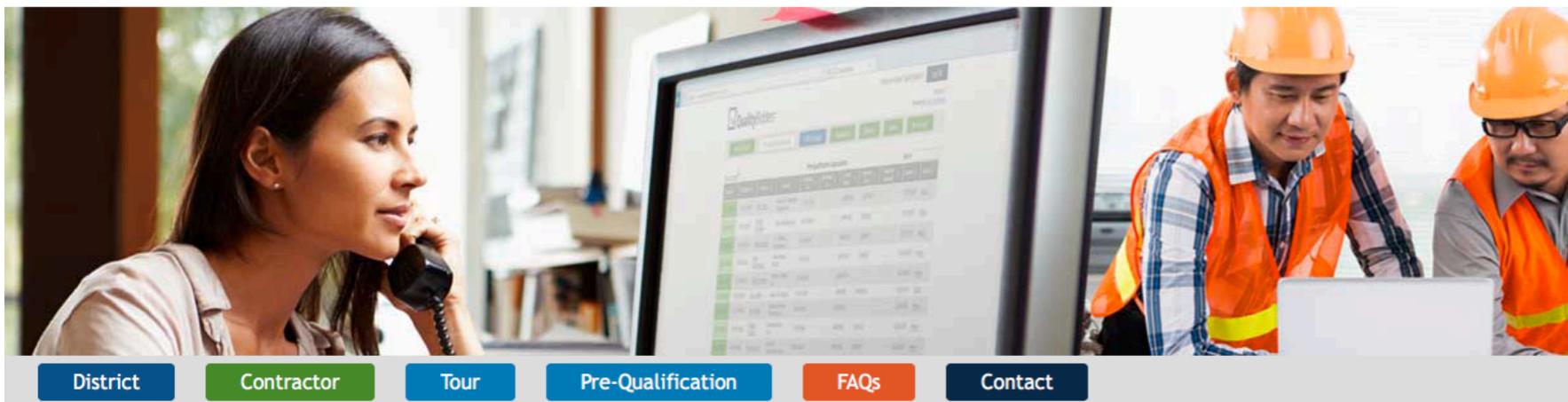
CUPCCAA\* applications collect your registration information for districts that maintain a list of registered contractors for their informally bid projects.

**The applications are not interchangeable.**

## Signing Up with Quality Bidders

To begin the application process:

- Visit [www.qualitybidders.com](http://www.qualitybidders.com) and click the green **1 Sign Up** button.



- Complete all fields and click **Sign Up**.
- Go to your email account and click the [Confirm my account](#) link on the email.\*
- Return to [www.qualitybidders.com](http://www.qualitybidders.com) and log in.
- Proceed to [Create Apps](#)

### \*Trouble receiving the confirmation email?

If the confirmation email does not arrive promptly, contact your IT department or email provider.

Have them put [qualitybidders@colbitech.com](mailto:qualitybidders@colbitech.com) on their "White List."

After they've done this, click the [Didn't receive confirmation instruction?](#) link at the Login screen.

### Accessing Quality Bidders

Access to Quality Bidders is controlled by an email address of someone at your company. **Only the owner of the email account will receive notifications and be able to edit applications.**

Before creating a Quality Bidders account with a specific email, ask yourself two questions:

1. Do you have the legal authority to do so?
2. Will you (and your email) be there for several years?

Some contractors will create a special Qualification Email Address that never leaves the company.

**Contact Quality Bidders if you need to transfer your account to another email address.\***

\*Our primary concern is making sure the financial data you have provided Quality Bidders remains secure and confidential.

## Create/Edit Application

**1**

Pre-Qualification Apps CUPCCA Apps FAQS Contact My Account Bids

**2** Create New Application

Pre-Qualification Applications										Search:
Created	Submitted	District	Reviewed On	Reviewed By	Current Status	Approval Limit	Expires	Actions		
07/09/2015	Not Submitted		Not Reviewed		SAVED, INCOMPLETE				<a href="#">Review</a>	<a href="#">Print</a>

**Contractor Pre-Qualification Questionnaire**

Step 1 Pre-Qualification Step 2 General Requirements Step 3 History and Performance Step 4 Recent Construction Projects Step 5 Finish \* Indicates that information is required

**Pre-Qualification**

**Contractor Information**

Firm Name \* Bob Dylan's Three-headed Guitars  
 Contact Person \* Bob Dylan  
 Address \* 1234 Any St., Any Town, CA, 92780  
 Phone Number \* 555-555-1212  
 Fax Number  
 Email address \* igoshorn@colbitech.com  
 License Number \*  [Check License](#)

Select at least one license classification\*

License Classifications  
[ADD LICENSE CLASSIFICATION](#)

License Comments (include information about C61-Specialty if relevant)

### Step 1: Pre-qualification

To start a new questionnaire, navigate to the **1 Pre-Qualification Apps** tab and click **2 Create New Application**.

#### Step 1: Pre-Qualification:

You can save your application at any point by clicking the **Save** button at the bottom of the screen.

- Your contact information will auto-populate.
- Input license number and as many license classifications as needed.
- Select business certifications if applicable.
- Answer **Qualification** questions.
- Press next button.

The program reviews the answers to **Step 1** and either proceeds to **Step 2** or notifies you that you are not qualified to proceed.

**If any question is incomplete, you will not be able to proceed.**

## Create/Edit Application

### Contractor Pre-Qualification Questionnaire

\* Indicates that information is required

Step 1 Pre-Qualification	Step 2 <b>General Requirements</b>	Step 3 History and Performance	Step 4 Recent Construction Projects	Step 5 Finish
<b>General Requirements</b>				
<b>Business Structure</b> <p>Select Business Type * <input type="button" value="Corporation"/></p> <p>Date Incorporated * <input type="text"/></p> <p>Under the laws of what state * <input type="button" value="Select State"/></p>				
<b>Business Information</b>				
<p>Please upload a copy of your latest reviewed or audited financial statement with accompanying notes and supplemental information. (Public Contract Code section 20101(e) exempts from this requirement a contractor who has qualified as a small business pursuant to Government Code section 14837(d)(1), if the bid is no more than 25 percent of the qualifying amount provided in section 14837(d)(1). As of January 1, 2001, the qualifying amount is \$10 million, and 25 percent of that amount, therefore, is \$2.5 million) Note: A financial statement that is not either reviewed or audited is not acceptable. A letter verifying availability of a line of credit may also be uploaded; however, it will be considered as supplemental information only, and is not a substitute for the required financial statement*</p> <p><input type="checkbox"/> By checking this box, I certify that my business qualifies as a small business as defined in GC 14837(d)(1) and am exempt from this requirement.</p>				
<p><b>Financial Statements</b></p> <p><input type="button" value="ADD FINANCIAL STATEMENT"/></p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No Has your firm or any firm with which any of your company's owners, partners or members was associated, ever been disbarred, disqualified, removed or otherwise prevented from bidding on, or completing, any government agency or public works project for any reason?*</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No Has your firm ever 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?*</p> <p>The following three 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. Also, you may omit reference to all disputes about amounts of less than \$50,000.</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No Has any claim against your firm concerning your firm's work on a Construction project ever been filed in court or arbitration?*</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No Has your firm ever filed a claim in court or arbitration against a project owner concerning work on a project or payment for a contract and filed that claim in court or arbitration?*</p>				

### Step 2: General Requirements

Continue through the second page of the application.

- Select business type.
- Attach required financial statements.
- Answer all questions about your company, including more detailed explanations should any question expand.
- Upload workers' compensation insurance statement.

**Incomplete questions are highlighted in red and include instructions on action to be taken.** Hovering over highlighted questions shows these instructions.

When completed, **Save** and proceed to Step 3.

## Create/Edit Application

### Contractor Pre-Qualification Questionnaire

Step 1 Pre-Qualification Step 2 General Requirements Step 3 History and Performance Step 4 Recent Construction Projects Step 5 Finish

\* Indicates that information is required

#### History and Performance

##### Company History

Yes  No Has there been any change of more than 10 percent in ownership of the firm at any time during the last three years? Note: A corporation whose shares are publicly traded is not required to answer this question.\*

Yes  No Is the firm a subsidiary, parent, holding company or affiliate of another construction firm?\*

Yes  No Are any corporate officers, partners or members connected to any other construction firms?\*

State your firm's gross revenues for each of the last three years. If your firm has not been in business for three years, enter \$0 for the gross revenue amount of prior years. Press the ADD button to add revenues for each year.\*

\* At least 3 entries must be added below

Gross Revenues

ADD GROSS REVENUE YEAR/AMOUNT

How many years has your organization been in business in California as a contractor under your present business name and license number?\*

Select Years

Yes  No Is your firm currently the debtor in a bankruptcy case? If so, please upload a copy of the bankruptcy petition, showing the case number, and the date on which the petition was filed\*

Yes  No Was your firm in bankruptcy at any time during the last five years? If so, please upload a copy of the bankruptcy petition, showing the case number and the date on which the petition was filed, and please attach a copy of the Bankruptcy Court's discharge order, or of any other document that ended the case, if no discharge order was issued\*

##### Licenses

If any of your firm's license(s) are held in the name of a corporation, partnership, or limited liability company, 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

Yes  No Has your firm changed names or license number in the past five years?\*

#### Step 3: History and Performance

Continue through the third page of the application.

- Answer question about the firm's ownership.
- Enter the firm's gross revenue for each of the last three years.
- Enter the firm's licenses, as applicable.
- Enter information about:
  - Disputes.
  - Bonding.
  - Compliance with CAL OSHA and other regulatory agencies.
  - EMR rate.
  - State wage violations, if any.

When completed, **Save** and proceed to Step 4.

## Create/Edit Application

### Contractor Pre-Qualification Questionnaire

\* Indicates that information is required

<b>Step 1</b> Pre-Qualification	<b>Step 2</b> General Requirements	<b>Step 3</b> History and Performance	<b>Step 4</b> <b>Recent Construction Projects</b>	<b>Step 5</b> Finish
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**Recent Construction Projects**

**Project History**

Provide the information requested below for the six largest public works projects for an educational institution and three largest private works of improvement on which you have completed your scope of work in the last five years. If you do not have six projects in education, list those first then all other public works. "Largest" means highest contract dollar value, including change orders. Names and references must be current and verifiable. Only list projects your firm performed as the general contractor in charge of all trades for the construction of a building. Provide email addresses for all references where feasible. Press the ADD PROJECT button to add detailed information about each relevant project your company has worked on. If you are a M/E/P contractor, list your largest projects in both categories.\*

\* At least 6 entries must be added below

**Projects**

Project Name \*

Project type \*

Location \*

Owner \*

Owner Contact (Name and Current Phone #) \*

Owner Contact Email \*

Architect or Engineer \*

Architect or Engineer Contact (Name and Current Phone #) \*

Architect or Engineer Contact Email

Construction Manager \*

Construction Manager Contact (Name and Current Phone #) \*

Construction Manager Contact Email

Description of Project, Scope of Work Performed \*

### Step 4: Recent Projects

Click the **ADD PROJECT** button to enter a new project. Enter project history information for six public works projects and three private construction projects, including references.

**These should be your most recent projects. If you are updating a previous application and have completed new projects, enter the new projects.**

Districts typically confirm project performance. Accurate contact information ensures quicker processing — inaccurate information delays processing.

If you performed work as a subcontractor:

- You might not have had contact with the owner or architect — get this information from the general contractor.
- Changes in construction value and time schedule refer to **work you performed**.

**Save** and proceed to Step 5.

## Create/Edit Application

### Contractor Pre-Qualification Questionnaire

Step 1 Pre-Qualification Step 2 General Requirements Step 3 History and Performance Step 4 Recent Construction Projects Step 5 Finish

\* Indicates that information is required

Finish

**District Selection**

Select at least one district to send this application to. When the application is submitted each district that is selected below will receive an email notifying them of your application.

\* At least one district must be selected

District \*

Burbank Unified School District (Los Angeles County Area)  
 Cajon Valley Union School District (San Diego County Area)  
 Coalinga-Huron Unified School District (Fresno County Area)  
 Covina-Valley Unified School District (Los Angeles County Area)  
 Cupertino Union School District (Santa Clara County Area)  
 East Side Union High School District (San Jose County Area)  
 Escondido Union School District (San Diego County Area)  
 Folsom Cordova Unified School District (Sacramento County Area)  
 Fremont Union High School District (Santa Clara County Area)  
 Grossmont Union High School District (San Diego County Area)  
 Little Lake City School District (Los Angeles County Area)  
 Natomas Unified School District (Sacramento Area)  
 North Monterey County Unified School District (North Monterey County Area)  
 Oxnard School District (Ventura County Area)  
 Rincon Valley Union School District (Sonoma County Area)  
 Sacramento City Unified School District (Sacramento County Area)  
 Santa Maria Joint Union High School District (Santa Barbara County Area)  
 Temecula Valley Unified School District (Riverside County Area)  
 Washington Unified School District (Sacramento County Area)  
 Westside Union School District (Los Angeles County Area)

< Back

Save

\*Note the GREEN border around the application. If you see a BLUE border, you are in a CUPCCA application.

### Step 5: Finish Application

In this section, select the district or districts you'd like to apply to.

Some districts have additional requirements that will be expressed in a small box below the district list (once that district is selected). They may direct you to their district website for more information.

Attach any document needed to address additional requirements.\*

When completed, **Save** the application. If items are incomplete, an error message will appear.

Once incomplete items are corrected, **Save** again and return to the **Pre-Qualification Apps** page.

At this point, your application is complete, **but it has not been submitted.**

Proceed to the next step to submit.

\*Each district will only be able to view the document attached to their application.

## Submit Application

**1**

Pre-Qualification Apps CUPCCAA Apps FAQS Contact My Account Bids Create New Application

Pre-Qualification Applications									Search:
Created	Submitted	District	Reviewed On	Reviewed By	Current Status	Approval Limit	Expires	Actions	
07/09/2015	Not Submitted	Colbi Unified School District	Not Reviewed		READY TO SUBMIT			Review <b>2</b> Submit Copy Print	

**Submit Application**

I 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.

**Note: Once your application has been submitted you will no longer be able to make modifications unless it is returned to you by a district for corrections or updates.**

**3** Ok Cancel

Bid Pre-Qualification Applications									Search:
Created	Submitted	District	Reviewed On	Reviewed By	Current Status	Approval Limit	Expires	Actions	
07/09/2015	07/23/2015	Colbi Unified School District	Not Reviewed		SUBMITTED			History Review Cancel Copy Print	

A submitted application will show as **SUBMITTED** in the **Current Status** column. Until it is reviewed, it can be **Canceled**. After that, it can only be returned for editing by the district.

### Submitting an Application

To submit a completed application, navigate to the **1 Pre-Qualification Apps** tab, find the application that is **READY TO SUBMIT** and click the **2 Submit** link in the Action column.

A pop-up will appear, asking you to certify that the information you're submitting is true. **3** Click **Ok** to certify the application and submit it.

The district will be notified of your submission. Once they open your application, **you will not be able to make changes**.

Should you need to make changes, you have three options\*:

- Cancel the Application before it is reviewed.
- Contact the district and ask them to return it.
- Wait for them to return it and make changes.

\*If your application is rejected, it can be appealed. Check the district appeals process for more details.

# Managing Applications

**1**

Pre-Qualification Apps CUPCCAA Apps FAQS Contact My Account Bids Create New Application

Show Archived

Created	Submitted	District	Reviewed On	Reviewed By	Current Status	Approval Limit	Expires	Actions
05/19/2016	Not Submitted		Not Reviewed		SAVED, INCOMPLETE			<b>2</b>
07/09/2015	05/23/2016	Colbi Unified School District	Not Reviewed		SUBMITTED			
07/09/2015	11/03/2015	North County High School District	01/26/2016	Donna District	APPROVED	\$2,500,000	01/26/2017	
07/09/2015	Not Submitted	Mission High School District	Not Reviewed		READY TO SUBMIT			

Search:

[Review Print Archive](#)  
[History Review Cancel Copy Print](#)  
[History Review Copy Print](#)  
[Review Submit Copy Print Archive](#)

The **Actions** column is where applications are managed. Click on the link to take various actions:

- History:** shows the history of a submitted application.
- Review:** opens the application, lets you edit it unless it has been submitted.
- Submit:** submits an application (when it is ready to submit).
- Cancel:** un-submits an application — this is only available if the application has not been reviewed.
- Copy:** creates a duplicate application that, after being updated with new information, can be submitted to a new district or to replace an expired application.
- Print:** prints a copy of the application.
- Archive:** hides the application from the list; useful for expired applications or duplicates. Click the [Show Archived](#) link on upper left to see your archived applications.

Other columns show the **District**, **Review Date/Person**, **Current Status** of an application, **Approval Limit**, and **Expiration Date**. You can sort each column in alphanumeric order by clicking the up/down arrows in that column. There is also a **Search** bar.

## Managing Applications

To manage your applications, navigate to the **1 Pre-Qualification Apps** tab, then use the **2 Action** links.

This is the section you **Submit** an application from.

**Review** allows you to view a submitted application or edit an incomplete one.

You can **Copy\*** an application (such as when your approved application expires, or when you want to apply to another school district).

\*Copy is not available for applications imported by the district, only those submitted directly through Quality Bidders.



by Colbi Technologies

## Contact Information

1

Pre-Qualification Apps

CUPCCAA Apps

FAQS

Contact

My Account

Bids

### Contact District

Contact a district using Quality Bidders for bid pre-qualification – for questions about the status of your pre-qualification application or bidding requirements:

[North County High School District](#)

[Alameda High School District](#)

[Mission High School District](#)

[Central High School District](#)

[Grossmont Union High School District](#)

[Colbi Unified School District](#)

2

Contact a district using Quality Bidders for CUPCCAA – for questions about the status of your CUPCCAA application for informal bidding for projects up to \$200,000:

[North County High School District](#)

[Alameda High School District](#)

[Mission High School District](#)

[Central High School District](#)

[Grossmont Union High School District](#)

[Colbi Unified School District](#)

3

### Contact Technical Support

Please provide details about the problem you encountered. Include the type and version of Internet browser if possible along with information about when the problem was encountered and what you were trying to do at the time.

[QualityBidders Technical Support](#)

4

### Who to Contact

If you have a question regarding your application or the criteria by which it will be pre-qualified, contact the school district you are applying to.

Their contact information is located on the **1 Contact** page.

District contact information is on the left: **2 Formally Pre-Qualification** above with **3 CUPCCAA** contact information below.\*

**4** For technical support issues, contact us via email.\*\*

### Technical Problems

For technical support, please contact our support technicians via email at [qbsupport@colbitech.com](mailto:qbsupport@colbitech.com).  
Include the Application # and the district you are applying to.

\*Not all districts accept CUPCCAA applications.

\*\*The first thing we'll ask you to do, most times, is to try running Quality Bidders in **Internet Explorer** or **Google Chrome**.