

OP-170.5 Trade Contractor Qualification Process

Exhibit E of the Interested Bidders Memorandum

Robins & Morton qualifies all trade contractor's whose subcontract amount will be greater than or equal to \$250,000. As a condition of awarding a subcontract, you may be asked to qualify with Robins & Morton. Robins & Morton utilizes [TradeTapp© by BuildingConnected©](#) to facilitate the qualification process. Typically, the qualification process begins after proposals have been submitted to a "shortlist" of trade contractors per package.

What information is needed to complete my qualification via TradeTapp?

1. **General Business Information**
2. **Financials:**
 - a. CPA Audited or Reviewed Financials are preferred.
 - i. Most recent 12month financial statement period
 - ii. Internal financials through most recent quarter
 - b. Financial submission must include a balance sheet, income statement, statement of cash flows and the backlog/WIP report corresponding to the same financial statement period
3. **Current Work in Progress Report** showing contract amounts, percentage completed and balance to bill with the columns totaled or **Current Backlog Amount**
4. **Project References – 3 or more references of projects that have been completed within the last two years**
5. **Bonding Letter** with single and aggregate limits
6. **Sample COI** conforming to R&M's insurance requirements
7. **EMR Letter** from insurance company detailing the EMR rate for the current and previous 2 years.
8. **Line of Credit** (total and available limits)