



# CITY OF COLUMBIA

Office of Business Opportunities Compliance  
 1401 Main Street, 4<sup>th</sup> Floor | Columbia, South Carolina 29201  
 Phone: 803-545-3950

## PROTÉGÉ ASSESSMENT SURVEY Professional Services

### I. General Business Data:

#### A. Business Address & Ownership:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone No.: \_\_\_\_\_

Cell: \_\_\_\_\_

E-mail: \_\_\_\_\_

Website: \_\_\_\_\_

Owner's Name: (If Proprietorship) \_\_\_\_\_

Nature of Business: \_\_\_\_\_

Year of Establishment: \_\_\_\_\_

Years in Business: \_\_\_\_\_

#### B. Work Experience

Please list three major projects completed in the past three years:

PROJECT	TYPE OF WORK	CLIENT NAME	DATE COMPLETED	CONTRACT AMOUNT

## II. Human Resources

### A. Number of Employees:

TYPE	FULL TIME	PART TIME	PERMANENT	TEMPORARY
Management				
Administrative				
Support Staff				
Engineers				
Estimator				
Bookkeeper				
Comptroller				

### B. Consultants

LEGAL	CPA	ARCHITECT	ENGINEER

## III. Technical Skills

### A. Estimating:

1. Do you have an estimator on staff? \_\_\_\_\_
  - a. If no; who prepares your estimates? \_\_\_\_\_
  - b. Do you get a second opinion? \_\_\_\_\_
  
2. Describe steps you take to prepare an estimate after you obtain plans and specifications:

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3. Describe how you arrive at costs for services:

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**B. Scheduling:**

1. Do you prepare detailed time schedules for your projects? \_\_\_\_\_  
If yes; what scheduling method do you use?  
\_\_\_\_\_  
\_\_\_\_\_
2. Do you update your schedule? (yes or no) \_\_\_\_\_  
If yes; how often? \_\_\_\_\_
3. Do you attend pre-construction conferences to enable you to understand the detailed work schedules? (yes or no) \_\_\_\_\_
4. Are you familiar with any of the following methods / schedules?
  - a. Critical Path Methods \_\_\_\_\_
  - b. Bar Charts \_\_\_\_\_
  - c. Written list of phases, with beginning and ending dates? \_\_\_\_\_
  - d. Organized list of phases of your work on paper with estimated time for each one? \_\_\_\_\_
5. Do you prepare your own schedule? (yes or no) \_\_\_\_\_  
If no; who prepares you schedule? \_\_\_\_\_

**IV. Project Management**

**A. Field Operations:**

1. Do you appoint a management team for each project? (yes or no) \_\_\_\_\_  
If yes; how do you select the team?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. Do you have a project file for each project? (yes or no) \_\_\_\_\_  
If yes; what do you include in the file?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. Do you meet with your field staff during the project? (yes or no) \_\_\_\_\_  
If yes; how often:  
\_\_\_\_\_  
\_\_\_\_\_

4. Do you have a wall chart to show the status of each of your active projects, with detailed progress and estimated completion dates? \_\_\_\_\_

5. Do you prepare periodic progress reports? (yes or no) \_\_\_\_\_

6. What items are included in these reports?

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7. What steps do you normally take when starting a new project?

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8. What steps do you normally take to close out a project after you have completed the work?

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**B. Change Orders**

1. What is your definition of a change order?

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2. Do you always request a written change order when asked to do work beyond the scope of your original contract? \_\_\_\_\_

3. Do you insist on a written change order before you begin to work on such changes? \_\_\_\_\_

4. Do you accept verbal directions for work beyond the scope of your contract? \_\_\_\_\_

5. When asked to perform work beyond the scope of your contract, what steps do you usually take?

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6. Does your accountant review the change order? \_\_\_\_\_

**V. Accounting**

1. Do you have an accounting system? \_\_\_\_\_
2. Is your accounting system automated or manual? \_\_\_\_\_
3. Do you have a chart of accounts? \_\_\_\_\_
4. Does your company have an in-house accountant? \_\_\_\_\_
5. Does your company have an audited financial statement? \_\_\_\_\_
6. If yes; when was your company last audited? \_\_\_\_\_
7. Does your accounting system provide you with the aging of accounts receivable and accounts payable? \_\_\_\_\_
8. What is your current Credit Score? \_\_\_\_\_
9. Does your company have an established cost system? \_\_\_\_\_
10. Which accounting method is used by your company for bidding purpose?
  - a. Completed Contract Method? \_\_\_\_\_
  - b. Percentage of Completion Method? \_\_\_\_\_
11. None of the above? \_\_\_\_\_
12. Does your company have a Job Cost System? \_\_\_\_\_
13. How do you process payroll?

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**VI. General Observation**

1. What do you consider to be your three major strengths?

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_

2. What do you consider to be your three weaknesses?

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_

**VII. Risk Management**

1. Company Name

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2. Company Address

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3. Contact Person:

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4. Assessment Survey

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5. Insurances Required:

1. General Liability \_\_\_\_\_

Effective dates \_\_\_\_\_

Limits \_\_\_\_\_

Claims \_\_\_\_\_

2. Risk Management Program? \_\_\_\_\_

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Protégé Signature

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Print Name

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Date