



CITY OF COLUMBIA

Office of Business Opportunities, Compliance
1401 Main Street, 4th Floor | Columbia, South Carolina 29201
Phone: 803-545-4185

Mentor and Protégé Team Annual Business Plan Review

Date: _____ Annual Report Year: _____

**Due the 1st of August each year for the reporting period of July 1st-June 30th.*

Company Contact Information:

Mentor Company		Protégé Company	
Firm Name		Firm Name	
Contact Name		Contact Name	
Title		Title	
Address		Address	
Phone Number		Phone Number	
Fax Number		Fax Number	
Email Address		Email Address	

Project Divisions

Designate which of the Project Divisions this Team will perform work. This should be same Division listed on your application.

<u>Two Project Divisions (Construction)</u>	<u>Five Project Divisions (Professional Services)</u>
Water Plant Certification (WP) <input type="checkbox"/>	Water Treatment <input type="checkbox"/>
Water Line Certification (WL) <input type="checkbox"/>	Waste Water Treatment <input type="checkbox"/>
	Water Distribution <input type="checkbox"/>
	Waste Water Collection <input type="checkbox"/>
	Storm Water <input type="checkbox"/>

PLEASE ANSWER THE FOLLOWING IN REGARDS TO WATER AND SEWER PROJECTS ONLY.

- 1. Describe the Protégé's current business operations. (i.e.; staff, technology, equipment, credentials, license and financial operations).

- 2. List the area of work the Protégé currently works within?

- 3. Describe the Protégé's current experience with the City and/or other Government Agencies?

- 4. In the past year, has the Protégé expanded in these areas?

- a. Staff: _____
- b. Skill set: _____
- c. Technology: _____
- d. Training: _____
- e. Business Development Strategies: _____
- f. Estimating/Pricing: _____
- g. Other: _____

- 5. How has the Protégé created or enhanced a successful safety program?(Construction Services

6. What types of training, certifications or licenses has the Protégé received in the past year?

7. How has the Mentor helped to facilitate the training indicated above?

8. Has the Protégé met any of its quantitative goals identified in the MPP Team Business Plan this year? (i.e. scope, increase volume, increase profitability, improve safety, etc.)

9. What equipment has the Protégé acquired over the last year? How has this assisted with their goals?

10. How has the Protégé improved its work scheduling over the past year? Has the Protégé sequenced its work schedule with the Mentor?

11. What types of scheduling tools are being utilized throughout a typical project?

12. How has the Protégé increased its marketing in the past year? How has the Protégé increased its performance and/or work load management over the past year?

13. How has the Protégé increased its estimating capabilities over the past year?
(Construction Services)

14. How has the Protégé increased its fee estimating over the past year? (Professional Services)

15. What technology or expertise has the Protégé acquired this past year? How has this helped the Protégé build capacity?

16. Describe the sources and strategies used by the Protégé for bonding, insurance, financing, technical assistance, etc.?

17. Is the Protégé on track to meet the financial projections indicated in the original business plan? In the past year, how has the Mentor assisted in meeting the Protégé's projections in water & sewer?

18. How has the Mentor assisted the Protégé in acquiring the following:

- a. Bonding/financing (Construction Services)
- b. Technical assistance (i.e. Estimating, scheduling)
- c. Equipment and technology (List equipment needed)
- d. Suppliers (Construction Services)

19. What resources has the Mentor committed to this program?

20. What resources has the Protégé committed to this program?

21. Is your team currently working on a **City of Columbia** project?

- Yes No

22. Has your company responded to any **City of Columbia** solicitations during this reporting period?

- Yes No

23. How many **City of Columbia** solicitations has your team responded to during this reporting period?

- 1 2 3 or more

24. Have you communicated with your team protégé during this reporting period?

- Yes No

25. Is your Mentor-Protégé team working on any other projects outside of a City of Columbia project? If yes, please list below:

PROJECT	TYPE OF WORK	CLIENT NAME	DATE TO BE COMPLETED	CONTRACT AMOUNT

26. What is the average turnaround time for payment received from the City of Columbia?

- 30 days
- 60 days
- 90 days or more

27. Does your company feel that the City of Columbia is providing enough assistance to your team?

- Yes
- No

28. Additional Comments

Each firm must submit all the documents listed below WITH THIS ANNUAL REVIEW:

- A. **Current City of Columbia Business License**
- B. **Submit company’s most recent tax return or letter from CPA stating gross revenue**
- C. **Submit current breakdown of water & sewer revenue received for the reporting period of July 1st – June30th.**
- D. **Proof of Professional License (General Contractor, Engineer, etc.)**

***Additional information may be requested at any time.**

Return completed form to the Office of Business Opportunities - Compliance.

This Business Plan Review was completed on _____ by BOTH the Mentor and the Protégé. (Both authorized signatures required)

Statement of Commitment: Mentor is committed to providing an adequate amount of time and expertise necessary to meet the intent of this mentor-protégé relationship. Protégé is committed to providing the resources and effort required to successfully implement this Annual Business Plan. Mentor and Protégé agree to meet at least quarterly to review progress made on this Plan.

Mentor Signature

Protégé Signature

Title

Title

Firm Name

Firm Name

Date

Date

City of Columbia, Office of Business Opportunities - Compliance.

By: _____

Title: _____

Date: _____