



CITY OF COLUMBIA

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

PROTÉGÉ ASSESSMENT SURVEY Construction 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 (3) major projects completed in the past three years:

PROJECT	TYPE OF WORK	CLIENT NAME	DATE COMPLETED	CONTRACT AMOUNT

C. Bonding & Financial Capacity:

1. Have you ever applied for a bond? (yes or no) _____
If yes; was it granted? _____
2. If granted; what was the bonding limit? _____
3. If bond request was denied, please state reason.

4. Name of Bonding Company: _____
5. Bonding Amount:
a. Aggregate: _____ b. Individual: _____
6. Do you have a line of credit? (yes or no) _____
If yes; what is your credit limit? _____
7. What is your current Credit Score? _____
8. Name of Financial Institute _____
9. Are you financing your equipment? (yes or no) _____
If yes; with whom? _____

II. Human Resources

A. Number of Employees:

TYPE	FULL TIME	PART TIME	PERMANENT	TEMPORARY
Management				
Administrative				
Support Staff				
Engineers				
Estimator				
Foreman				
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:

3. Describe the methods used to compute the unit costs:

4. Describe how you arrive at costs for lump sum items:

5. Describe the type of items you include in your estimate for temporary facilities:

6. Do you include mobilization costs in your estimate? _____

7. What items do you normally include in your mobilization costs?

8. Please give four (4) items that you usually include in your direct costs:
- a. _____
 - b. _____
 - c. _____
 - d. _____
10. Please give four (4) items that you usually include in your indirect costs:
- a. _____
 - b. _____
 - c. _____
 - d. _____

11. Do you know your indirect rate? _____

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. As a subcontractor, do you usually request a copy of the general contractors schedule? _____
4. As a subcontractor, do you usually provide input on your portion of work into the general contractor's schedule? _____
5. Do you attend pre-construction conferences to enable you to understand the detailed work schedules? _____
6. 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? _____
7. Do you prepare your own schedule? (yes or no) _____
 If no; who prepares you schedule? _____

C. Purchasing/Resource Allocation:

1. Do you have a good relationship with your major supplier & equipment leasing company? _____

2. Do you get prices from suppliers when preparing a bid? (yes or no) _____
 - a. If yes; how many suppliers do you contact get a price for each item? _____

 - b. If no; how do you determine prices for bidding?

3. Do you check with your suppliers as to the lead time for delivery? _____

4. Do you establish firm dates for materials delivery in accordance with the 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. Does your superintendent or foreman keep a daily log? (yes or no) _____
If yes; what is included in the log on a typical day?

4. Do you meet with your field staff during the project? (yes or no) _____
If yes; how often:

5. Do you communicate daily with your foreman? (yes or no) _____
If yes; what is normally discussed?

6. How often do you communicate with the general contractor's superintendent or resident engineer for project?

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

8. Do you prepare periodic progress reports? _____

9. What items are included in these reports?

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

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

B. Change Orders

1. What is your definition of a change order?

2. In your opinion, is there a difference between a change order and an add?
(yes or no) _____ If yes; what is the difference?

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

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

5. How do you handle additional work outside the scope of the original contract?

6. Does your estimator review the change order? _____

7. Does your accountant review the change order? _____

8. How do you handle excessive delays caused by prime and/or others outside your organization?

9. Do you seek reimbursement from the outside parties for costs incurred by your organization? _____

10. How do you ascertain such costs?

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. Does your company have an established cost system? _____
 9. Which accounting method is used by your company for bidding purpose?
 - a. Completed Contract Method? _____
 - b. Percentage of Completion Method? _____
 10. None of the above? _____
 11. Does your company have a Job Cost System? _____
 12. How do you process payroll?
-
-

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

2. Company Address

3. Contact Person:

4. Assessment Survey

Insurances and Certifications Required:

1. W/P or W/L License? _____
2. Workers' Compensation _____
Effective dates _____
Broad Form States _____
Is premium audited annually? _____
3. General Liability _____
Effective dates _____
Limits _____
Claims _____
4. Automotive Liability Coverage _____
Effective Dates _____
Are all registered vehicles included? _____
What are liability limits? _____
5. Drug-Free Program? _____
6. Risk Management Program? _____
7. Inland Marine _____
Effective dates _____
Is equipment ID# list maintained? _____
8. Contractor's Liability _____
9. Umbrella _____

Protégé Signature

Print Name

Date