



# CITY OF COLUMBIA

Department of Utilities and Engineering  
 Compliance Division  
 P.O. Box 147 | Columbia, South Carolina 29217  
 Phone: 803-545-3049 Fax: 803-545-4130

## MENTOR PROTÉGÉ PROGRAM Professional Services

### Mentor and Protégé Annual Business Plan

Date: \_\_\_\_\_ Annual Report Year: \_\_\_\_\_

**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	
Certifications		Certifications	

**Company Profile (Form 707)**

Annually, each Firm's company profile must be updated to reflect current projects, certifications, capabilities and contact information. This is to be sent in with your annual report.



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## Project Divisions

Designate which of the five (5) Project Divisions in which this Team will perform work. This should be same Division listed on your application.

5 type Project Divisions:

1. Water Treatment
2. Waste Water Treatment
3. Water Distribution
4. Waste Water Collection
5. Storm Water

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

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

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

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

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4. List the area(s) of work the Protégé desires to expand:

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5. What does the Protégé consider essential to expand in these areas?

Staff:

Skill set:

Technology:

Training:

Business Development Strategies; Estimating/Pricing:

Other:

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6. Discuss ways the Protégé may create or enhance a successful safety program.

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7. What is your experience modification rate? (as it pertains to workers compensation)

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8. What types of certifications or licenses will the Protégé need to succeed?  
How will the Mentor help to facilitate the training?

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**9. What equipment should the Protégé acquire over the next few years?**

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**10. How will this assist with the Protégé achieving their goals?**

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**11. How can the Protégé sequence its work schedule with the Mentor?**

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**12. How can the Protégé increase its marketing?**

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**13. How can the Protégé increase its qualifications?**

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**14. How can the Protégé increase its fee estimating?**

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**15. How can the Protégé increase its work load management?**

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**16. What technology or expertise should the Protégé acquire over the next three years? How will this help the Protégé to build capacity?**

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**17. What are the Protégé's specific quantitative goals? (Skills learned, projects completed, increase in funds, etc.)**

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**18. Describe potential sources to be used by the Protégé for bonding, insurance, financing, technical assistance, etc.**

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**19. Describe strategies the Protégé may use for bonding and insurance needs?**

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**20. Describe strategies the Protégé may use for financing needs?**

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**21. Create Protégé financial projections for the next three years. How will the Mentor assist in meeting the Protégés projections in water & sewer?**

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**22. Describe how a Mentor may assist in acquiring the following: \_\_\_\_  
Professional liability insurance/risk management:**

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**Technical assistance (ie; estimating, scheduling):**

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**Equipment and technology:**

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**Training, Staffing and/or Financing:**

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**23. What resources will the Mentor commit to this Program? When will they be available?**

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**24. What types of training will the Protégé receive?**

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**25. What resources will the Protégé commit to this Program? (staff time, financial resources) When will they be available?**

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**26. What are the Protégé's goals for the next three years? Indicate this by year below. (ie, scope, increase volume, increase profitability)?**

**1 year:**

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**2 years:**

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**3 years:**

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**27. Other areas the Protégé might benefit from this program?**

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This Business Plan was completed on \_\_\_ day of, 20\_\_\_ with the collaboration of **BOTH** the Mentor and the Protégé. (Both authorized signatures required)



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**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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Approved:

City of Columbia, Department of Utilities & Engineering, Compliance Division.

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_