



### A/E EZ Questionnaire

**For A/E, Surveying and Landscape Architecture firms with annual gross billings from \$0 to \$500,000**

1. Firm Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_  
 Principal Location: \_\_\_\_\_ Telephone: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Fax: \_\_\_\_\_

2. Is a principal, partner, officer or director a licensed architect, engineer or registered land surveyor?  Y  N
3. A. Is your firm currently insured?  Y  N Date firm established \_\_\_\_\_
- B. Current carrier \_\_\_\_\_ Expiration date \_\_\_\_\_  
 Current limits of liability \_\_\_\_\_ Deductible \_\_\_\_\_ Current premium \_\_\_\_\_
- C. Does the current policy provide full Prior Acts coverage?  Y  N  
 If so, what is your Prior Acts date? \_\_\_\_\_
- D. Number of years continuously insured? \_\_\_\_\_

4. Please provide your professional service billing information, including billings attributable to consultants.

	Most Recently Completed Fiscal Year	Second Most Recently Completed Year	Estimated Billings
Dates of Reporting Periods	to	to	to
A. Projects currently covered by specific project policy	\$	\$	\$
B. Feasibility studies, reports, opinions, landscape architecture, land surveying, interior design and abandoned projects	\$	\$	\$
C. All Other Billings	\$	\$	\$
D. Direct Reimbursables (e.g. travel per diem, etc.)	\$	\$	\$
E. Total Gross Billings	\$	\$	\$

5. Are greater than 10% of your billings attributable to: (Please check the appropriate boxes below) If yes, please explain in Question 10.  
 Design/Build  Y  N Pollution  Y  N Product Design  Y  N Asbestos Services  Y  N
6. Are you owned by or do you own another entity which provides construction related services?  Y  N  
 If yes, please provide details in Question 10.
7. A. Please indicate the percentage of the following disciplines in which the Applicant is engaged: (Total Must Equal 100%)
- |                                 |                                    |
|---------------------------------|------------------------------------|
| _____ % Architecture            | _____ % Land Surveying             |
| _____ % Civil Engineering       | _____ % Mechanical Engineering     |
| _____ % Construction Management | _____ % Sanitary Engineering       |
| _____ % Electrical Engineering  | _____ % Structural Engineering     |
| _____ % Full Service A/E Firm   | _____ % Transportation Engineering |
| _____ % HVAC Engineering        | _____ % Other: _____               |
| _____ % Landscape Architecture  | _____ % Other: _____               |

B. Please indicate the percentage of billings derived from each project type.

_____ % Commercial Buildings	_____ % Bridges
_____ % Industrial	_____ % Chemical/Petro Chemical
_____ % Manufacturing	_____ % Condos
_____ % Residential Buildings	_____ % Convention Centers
_____ % Roads	_____ % Dams
_____ % Sewage	_____ % Jails/Justices
_____ % Transportation	_____ % Tunnels
_____ % Water	_____ % Other: _____

8. A. In the past 10 years have any claims, suits, demands been made against the firm, its predecessor or any past or present principal?  Y  N  
 Number \_\_\_\_\_ Total Paid/Incurred \_\_\_\_\_  
 (Includes reserves)

B. After inquiry, is the Applicant aware of any act, error, omission or circumstance which may possibly result in a claim being made against them? If yes, please explain in Question 10. below:  Y  N

9. Risk Management

A. Does your firm:

- 1. Use written in-house quality control procedures?  Y  N
- 2. Have an automated master specification system?  Y  N
- 3. Have an in-house program for continuing education?  Y  N
- 4. Have a TQM program?  Y  N

B. Has your firm:

- 1. Participated in an Organizational Peer Review?  Y  N
- 2. Completed the Schinnerer Voluntary Education Program?  Y  N

C. Number of employees who have had at least six hours of continuing education in the past 12 months: \_\_\_\_\_

D. Please list the percentage of your firm's services rendered under AIA or EJCDC standard forms of agreement: \_\_\_\_\_ %

10. Explanations to "Yes" answers: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

11. For Surveyors Only

A. Are all registered land surveyor members of ACSM?  Y  N

B. Services percentage breakdown should total 100%.

\_\_\_\_\_ % Subdivision Work, Topographic, Construction Stakeout, Hydrographic  
 \_\_\_\_\_ % Engineering Services  
 \_\_\_\_\_ % All Other Services

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