

Partner evaluation tool

This tool, developed by CCA's Trade Contractor National Advisory Council, helps contractors evaluate potential project partners, including general contractors, owners, and consultants to factor into their decisions and pricing. This tool may be further customized, with different weighting or criteria. When evaluating larger firms, consideration may be paid to differentiating between specific teams or departments. For first-time partners, the scoring of some criteria may need to be determined by asking questions or checking references.



Element	Low risk (Score 1 point)	Minor risk (Score 2 points)	Moderate risk (Score 3 points)	Major risk (Score 4 points)	High risk (Score 5 points)	Score
Payments	Payments are on time consistently	Late payments are rare	Payments are sometimes late and/or disputed	Payments are often late and/or disputed	Payments are always late and/or disputed	
Contracts	Fair, clear, requires no revision/negotiation	Mostly fair, minor revisions, little negotiation	Somewhat complex, requires minor legal (lawyer) review and negotiation	Complex, requires legal (lawyer) review, negotiations are difficult	Complex, legally unfair, not open to negotiation or revision	
Communication	RFIs and Change Orders issued in good time, prices evaluated fairly	A little delay in response to RFIs and Change Orders, minor negotiation	Delays in response to RFIs and Change Orders, conflicting information, negotiation on prices	Lack of (or incorrect) information is delaying the work	Lack of (or incorrect) information has a negative impact on morale and profits	
Project management/ Schedule	Schedule is clear, realistic, and agile involving direct team feedback	Schedule is mostly clear and realistic with some agility issues	Schedule is ok, requires a moderate amount of revision, some direct team feedback	Schedule requires constant revision, creates conflict and chaos	Schedule is non-existent or irrelevant creating morale issues and profit loss	
Culture on site	Positively supports the team and celebrates wins	Fairly supportive to the team	Supportive when asked, some negativity, some celebrations	Mostly negative and unsupportive of the team	Adversarial and combative within the team, morale is negatively impacted	
Reputation	Known by peers as an excellent partner	Known to be mostly good to work for	Only good with certain staff or doing specific kinds of projects	Has a negative reputation with a couple peers	Has a negative reputation from multiple sources	
Total:						

Your score indicates the level of risk associated with the project.

Risk		
Low	Project is likely to run smoothly with high morale, a good culture on site, and should positively impact profits and company reputation.	5-10
Minor	Project is likely to be fairly successful with a few small hurdles and some gains.	11-15
Moderate	Project is likely to be manageable with both challenges and benefits.	16-20
Major	Project is likely to be very challenging with many hurdles and losses.	21-25
High	Project is likely to be chaotic, resulting in manpower losses and negative impacts to profit and company reputation	26-30

Disclaimer

This CCA Best Practices Services tool is a product of a consensus-building process aimed at balancing the interests of all parties on the construction project. They reflect recommended industry practices. Readers are cautioned that the Partner Evaluation Tool does not deal with any specific fact, situation, or circumstance. They do not constitute legal or other professional advice. CCA does not accept any responsibility or liability for loss or damage that may be suffered as a result of the use and interpretation of this tool.