



**Financial
Performance Survey
2015
for Fiscal Year
2014**

Confidential Survey Form

TAKE THIS SURVEY ONLINE at <https://sbcsurvey.sbcindustry.com>

(DNA = Does Not Apply Ø = Applies But Value is Zero)

All information reported should relate only to your manufactured components: roof & floor trusses, wall panels, LVL, I-Joists, Glulam, and sub-components. Do not include lumber or other retail building material sales. Do not put information identifying your company on this page.

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Purpose

The purpose of SBCA's **2015 Financial Performance Survey** is to provide a means of collecting information that, when compiled, will assist SBCA members in making business financial decisions by comparing their relative performance to industry norms. The intent of this survey is not to restrict competition in any way in the engineered wood building component industry. While participation in this survey is highly recommended, it is voluntary.

Company Information

Please fill in the information requested below. In order for the identity of your survey to remain unknown to SBCA Staff, this sheet will be removed from the survey and retained with the independent consultant. The remainder of the survey will be forwarded to SBCA Offices. Be sure to put identifying information on this page *only*. For further information on confidentiality, see the following page.

No member of the SBCA Board of Directors or Office Staff, including the Executive Director, will have access to the identity of individual reported figures. If you have questions on this, please call SBCA Staff at 608-274-4849.

Representative: _____

Company: _____

Street Address (NO PO Boxes): _____

City State Zip: _____

Telephone: _____

Fax: _____

Email: _____

Return your survey to:
SBCA Financial Performance Survey
c/o HVS Bookkeeping Solutions, Inc.
Attn: Robin Hubbard-Van Stelle
7322 Meadow Valley Road
Middleton WI 53562
[**hvsbookkeepingsolutions@gmail.com**](mailto:hvsbookkeepingsolutions@gmail.com)

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General Instructions

Thank you for your participation in this important research project. *Please read the general instructions below before answering the survey questions. Failure to follow all instructions will cause surveys to be unacceptable.*

1. The information submitted should be for the 2014 calendar year or the fiscal period most closely related to 2014.
2. Consider filling out this survey online at <https://sbcsurvey.sbcindustry.com>. The system will guide you through creating an anonymous ID and guide you through the survey.
3. If you choose to submit a paper version survey - Please read all questions before beginning. **Every blank must be filled** — either with data, zero, or “DNA” (does not apply). If actual data is not available, make the best possible estimate. **Please be sure to fill out the front and back of all pages, and double-check all calculations. It is important that you provide answers for all questions. INCOMPLETE SURVEYS WILL NOT BE ACCEPTED!**
4. If your company owns more than one plant, *fill out one survey per region*, to include all plants in that region. Mark the number of plants in question 1 on page 4. If accounting is kept separately at each plant in one region, you may fill out more than one survey for that region and record the number of plants corresponding to the survey in question 1. **Do not combine plants in different regions onto one survey.** Additional copies of this survey may be photocopied (*be sure to copy all pages - front and back*), or contact SBCA Staff for additional forms.
5. **All information reported should relate only to your manufactured components: roof trusses, floor trusses, wall panels, LVL, I-Joists, Glulam, and subcomponents. Do not include conventional framing lumber and other material sales.**
6. Completed surveys should be returned to:

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hvsbookkeepingsolutions@gmail.com

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7. We MUST receive your survey by **Friday, May 8, 2015.**

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INDIVIDUAL RESPONSES ARE CONFIDENTIAL

The final report will contain **consolidated figures only**, and no information will be identified with any specific company. All surveys will be sent to the independent consultant, where the first page containing identifying information will be removed. The remainder will be sent to SBCA Offices for tabulation. **Be sure to put identifying information on the previous page of this survey only.** Survey responses will be destroyed at the completion of the project.

No member of the SBCA Office Staff or Board of Directors, including the Executive Director, will have access to the identity of individual reported figures.

The cost of the final report is summarized below:

	Participating	Non-Participating
Members	No charge	\$1600
Non-Members	Not available unless company joins SBCA	Not available

Section I. General Information

1. How many PLANTS are you including **on this form**? _____ (Remember not to combine plants in different regions of the country.)
2. What percentage of your business comes from the following?

Residential (Single Family)	%
Multifamily/Apartments	%
Post-Frame/Agricultural	%
Commercial/Industrial	%
Other (describe):	%
Other (describe):	%
Total (must equal to 100%)	100%

3. Total square footage of buildings used for production in 2014: _____ ft.²

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4. **Hours Per Product:** If possible, designate hours for cutting and hours for assembly. The total hours for cutting and assembly (columns C and D below), if entered, must equal total hours worked (column B). Please fill this out using an average number of **full-time equivalent** employees and total hours worked in 2014 (for multiple positions filled by one person, represent in decimals if needed):

	Required			If Available		
Direct Labor	A. Number of Employees	B. Total Hours Worked	Must equal	C. Number of Hours for Cutting	plus	D. Number of Hours for Assembly
Wood Roof Trusses			=		+	
Wood Floor Trusses			=		+	
Wood Wall Panels			=		+	

Material Handling	Number of Employees	Total Hours Worked
Delivery		
Yard (material handling)		
Other (describe):		

Indirect Labor	Number of Employees	Total Hours Worked
Technical/Engineering (truss technicians, engineers, etc.)		
Manufacturing Supervisors and Production Control		
Inside Sales (support, pricing, orders, etc.)		
Outside Sales (field sales)		
Administrative (office staff, clerical, accounting, etc.)		
Other (describe):		

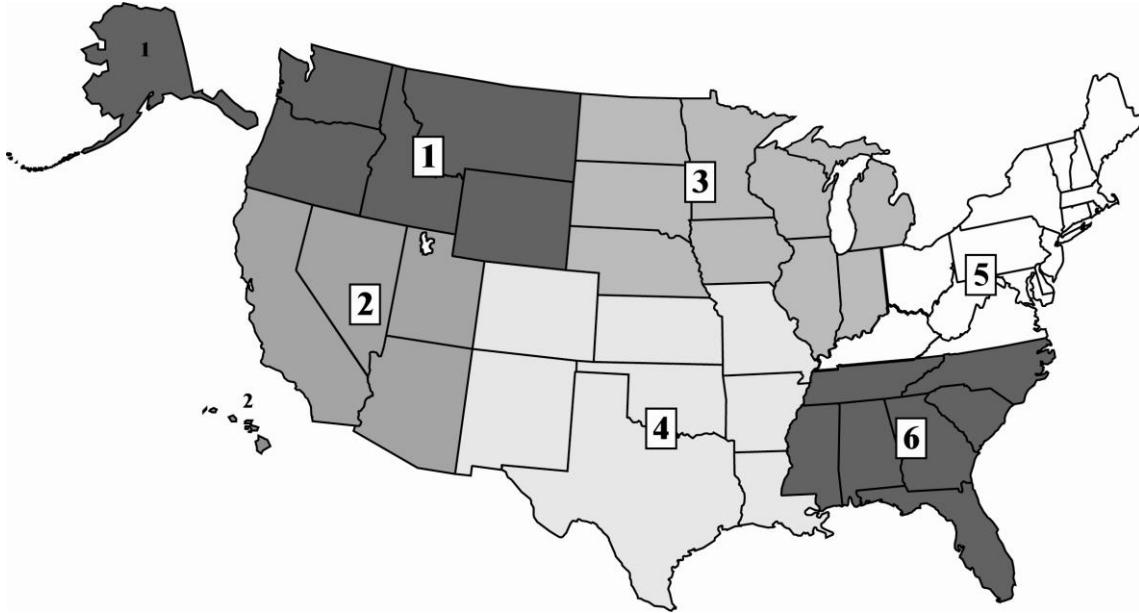
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5. Enter the region for which THIS survey is being completed: _____



Remember: If your company has plants in more than one region you should complete a separate survey for EACH region. The numbers on THIS survey should reflect information for ONLY those plants in the region covered.

Note: for Canadian participants, please select the region that is directly south of your location.

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Section II. General Financial Background

6. Total Workers' Compensation Insurance Paid in 2014: \$ _____
7. Total General Liability & Property Insurance Paid in 2014: \$ _____
8. Total Errors and Omissions Insurance Paid in 2014: \$ _____
9. Total Vehicle Insurance Paid in 2014: \$ _____
10. Total Umbrella Insurance Paid in 2014: \$ _____
11. Total Health Insurance paid in 2014: \$ _____
12. Average Trade Accounts Receivable (Gross) Balance per Month (excluding reserve for bad debt): \$ _____
(Ave. A/R = [(Jan. A/R)+(Feb. A/R.) + ... +(Dec. A/R))/12]
13. Average **Raw** Inventory Balance per Month: \$ _____

(Ave. Inventory = [(Jan. Raw Inventory)+(Feb. Raw Inventory.) + ... +(Dec. Raw Inventory))/12)

What method do you use to track inventory (check one)?

- ☐ FIFO
☐ LIFO
☐ Market
☐ Cost Averaging

Section III. Product Information

FOR THIS SECTION (14-16), ESTIMATE IF NUMBERS ARE NOT AVAILABLE!

14. Total Board Footage of lumber used in components in 2014 (estimate, if necessary):

Component Type	Board Footage
Roof Trusses	bd.ft.
Floor Trusses (Include bd.ft. of floor trusses that go into floor decks.)	bd.ft.
Floor Truss Headers	bd.ft.
Wall Panels	bd.ft.
Floor Decks w/I-joists	sq.ft.
Floor Decks w/Floor Trusses	sq.ft.
Other (describe):	bd.ft.

15. Do you manufacture steel trusses? ☐ Yes ☐ No

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16. Enter your **Annual Components Sales Volume** for 2014 of the products shown below (estimate, if necessary and round to the nearest whole dollar):

Product	Sales Volume
Wood Roof Trusses	\$
Wood Floor Trusses	\$
Wood Floor Truss Headers	\$
Metal Web Floor Trusses	\$
Wood Wall Panels	\$
Steel Roof Trusses	\$
Steel Floor Trusses	\$
LVL (e.g., Microlam or Paralam)	\$
I-Joists	\$
Glulam	\$
Rim Board	\$
Sheathing (Plywood/OSB)	\$
Floor Decks w/I-joists	\$
Floor Decks w/Floor Trusses	\$
Hardware (hangers, anchors, etc.)	\$
Other:	\$
Total (must equal question 43 on p. 11)	\$

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Section IV. Asset, Liability and Stockholders' Equity Analysis

This section concerns the analysis of Assets, Liabilities and Stockholders' Equity. **Please write in the dollar amount of your Total Assets (number 17 below), and then enter the dollar amount of each item in this section.** If you cannot obtain a portion of this information, please use your best estimate. **DO NOT LEAVE ANY ITEMS BLANK.** If the information does not apply to your company, please indicate with "DNA". If the information does apply to your company, but is equal to zero, please indicate with a "Ø".

Assets (Please round to the nearest whole dollar)

17. Enter actual dollar amount of Total Assets: \$ _____,_____,_____

Current Assets

18. Cash (including checking and payroll accounts, savings accounts, petty cash, certificates of deposit, short-term marketable securities)	\$ _____
19. Trade Accounts Receivable (net of allowance for doubtful accounts)	\$ _____
20. Accounts Receivable – Other	\$ _____
21. Raw Materials Inventory	\$ _____
22. Finished Goods Inventory - Cost Value (including work in progress)	\$ _____
23. All Other Currents Assets	\$ _____
24. Total Current Assets (sum of 18 through 23)	\$ _____

Non-Current Assets

25. Net Fixed Assets (net of allowance for depreciation)	\$ _____
26. Intangible Assets	\$ _____
27. All Other Non-Current Assets	\$ _____
28. Total Non-Current Assets (sum of 25 through 27)	\$ _____
29. Total Assets (24 + 28)	\$ _____

**Total Assets directly above (29) must equal ↗
Total Assets (17) entered at the top of the page.**

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Liabilities (Please round to the nearest whole dollar)

Current Liabilities

30.	Current Portion of Long-Term Debt	\$
31.	Notes and Loans Payable to Shareholders - Current Portion	\$
32.	Accounts Payable	\$
33.	Accrued Taxes - All Tax Obligations	\$
34.	All Other Current Liabilities	\$
35.	Total Current Liabilities (sum of 30 through 34)	\$

Non-Current Liabilities

36.	Long-Term Debt	\$
37.	Notes and Loans Payable to Shareholders - Long-Term Portion	\$
38.	Other Non-Current Liabilities	\$
39.	Total Non-Current Liabilities (sum of 36 through 38)	\$
40.	Total Liabilities (35 + 39)	\$

Stockholders' Equity*

41.	Capital Stock, Retained Earnings, etc.	\$
42.	Total Liabilities and Stockholders' Equity (40 + 41)	\$

* In the case of a proprietorship or partnership, the stockholders' equity will be the proprietor's capital account or the sum of the partners' capital accounts respectively.

**Total Liabilities plus Stockholders' Equity (42) ↗
must equal Total Assets.**

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Section V. Sales, Cost and Expense Analysis

This section concerns the analysis of sales, costs and expenses. **Please write in the dollar amount of your Net Sales (45 below) and then enter the dollar amount of each item in this section.** If you cannot obtain a portion of this information, please use your best estimate. **Do not leave any items blank.** If the information does not apply to your company, please indicate with “DNA”. If the information does apply to your company, but is equal to zero, please indicate with a “Ø”.

Gross Sales (Please round to the nearest whole dollar)

- | | | | |
|-----|--|----|-------|
| 43. | Total Gross Sales for 2014 (this should be the same as the total for Question 16 on page 8) | \$ | _____ |
| 44. | Less: Discounts and Allowances | \$ | _____ |
| 45. | Net Sales (43 - 44) | \$ | _____ |

Cost of Goods Sold (Please round to the nearest whole dollar)

Cost of Materials (all items Net of Discounts)

- | | | | |
|-----|--|----|-------|
| 46. | Lumber | \$ | _____ |
| 47. | Steel | \$ | _____ |
| 48. | Plates: | | _____ |
| | A. Plates Including Engineering – Full Service | \$ | _____ |
| | B. Plates only | \$ | _____ |
| 49. | Hardware (hangers, anchors, etc.) | \$ | _____ |
| 50. | Other materials related to floor & roof trusses, wall panels and sub-component production (e.g. staples) | \$ | _____ |
| 51. | I-joists | \$ | _____ |
| 52. | LVL | \$ | _____ |
| 53. | Glulam | \$ | _____ |
| 54. | Sheathing (Plywood/OSB) | \$ | _____ |
| 55. | Other purchased materials or distributed products | \$ | _____ |
| 56. | Total Cost of Materials (sum of 46 through 55) | \$ | ===== |

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Cost of Production (for labor costs, see definitions on page 4)

Manufacturing Costs - Include all items associated with your manufacturing expenses in this category. Estimate if possible, otherwise include in question 76:

57. **Direct Labor Costs:** all hourly labor in cutting, assembly, material handling, and forklift operation to saws, including fringe benefits and other labor expenses (e.g. health insurance & workers comp., ***including*** payroll taxes), ***excluding*** delivery personnel.

A. Fixed costs (Example: salaried employees)

\$

B. Variable costs (Example: hourly labor, health insurance & workers comp.)

\$

58. **Indirect/Supervisory Labor:** manufacturing supervisors, foremen, production control, quality control personnel, field service, including fringe benefits and other labor expenses (e.g. health insurance & workers comp., ***including*** payroll taxes)

\$

59. **Facilities:** building expenses, rent, property taxes

A. Fixed (Example: rent or mortgage, property taxes)

\$

B. Variable (Example: material costs, maintenance)

\$

60. **Utilities:** telephone, electric, water, gas & oil

\$

61. **Insurance:** general liability, errors & omissions, property, and vehicle

\$

62. **Equipment/Other:** repairs & maintenance, factory supplies (banding, nails, staples, etc.), tools, equipment depreciation, capital lease expense, and miscellaneous

A. Fixed costs (Example: capital lease expense

\$

B. Variable costs (Example: repairs & maintenance

\$

63. **Total Cost Of Production** (sum of 57 through 62)

\$

64. **Total Cost Of Goods Sold** (56 + 63)

\$

Expenses (Please round to the nearest whole dollar)

Delivery Expenses - Include all items associated with delivery expenses in this category. Estimate if possible, otherwise include in question 76:

65. **Delivery Labor:** delivery personnel wages including fringe benefits and other labor expenses (e.g. health insurance & workers comp., ***including*** payroll taxes).

\$

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66. **Delivery Expenses:** gas, oil, tires, repairs to delivery equipment, fleet insurance, fleet depreciation, capital lease expense, etc. Include licenses, permits, and taxes.
of Trucking Miles: _____ \$ _____
67. **Yard Labor:** yard personnel wages including fringe benefits and other labor expenses (e.g. health insurance & workers comp., *including* payroll taxes) \$ _____
68. **Freight Out:** common carrier \$ _____
69. **Total Delivery Expenses** (sum of 65 through 68) \$ _____

Selling/Customer service Expenses:

70. **Inside Sales/Customer Service:** salaries & commissions including fringe benefits and other labor expenses (e.g. health insurance & workers comp., *including* payroll taxes) \$ _____
71. **Outside Salaries:** including fringe benefits and other labor expenses (e.g. health insurance & workers comp., *including* payroll taxes) \$ _____
72. **Outside Commissions** \$ _____
73. **Marketing/Advertising** \$ _____
74. **Other:** Auto, travel, entertainment, telephone, etc. \$ _____
75. **Total Selling Expenses** (sum of 70 through 74) \$ _____

Administrative Expenses - Include all items associated with your administrative expenses in this category. Estimate if possible, otherwise include total expenses in this section:

76. **Labor:** administrative salaries, including fringe benefits and other labor expenses (e.g., health insurance & workers comp., *including* payroll taxes). \$ _____
77. **Office Equipment Depreciation:** other than computers \$ _____
78. **Legal Expenses** \$ _____
79. **Other:** dues and subscriptions, accounting and other professional services, office supplies, etc. \$ _____
80. **Bad Debt Expense** \$ _____
81. **Total Administrative Expenses** (sum of 76 through 80) \$ _____
82. **Technical/Engineering Expense:** engineering functions (e.g. production layout drawings, etc.), salaries including fringe benefits and other labor expenses (e.g. health insurance & workers comp., *including* payroll taxes). \$ _____

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83.	Outside Sealed Engineering Expense	
	A. Design	\$
	B. Truss Engineering	\$
84.	Computers & Software: cost, supplies, depreciation.	\$
85.	Depreciation Expense: any depreciation or capital lease expense not included in manufacturing, delivery or administration.	\$
86.	Total Expenses (69 + 75 + 81 + 82 + 83 + 84 + 85)	\$
87.	Net Operating Profit (45 - 64 - 86)	\$
88.	Less: Interest Expense	\$
89.	Other Non-Operating Income/(Expense)*	\$
90.	Income/(Loss) Before Taxes (87 - 88 ± 89)	\$

*Please note any unusual or non-recurring income or expense — large incentive pay, large insurance premiums, lawsuits, supplier discounts, or any other large payments or rebates — along with explanations. Show these as a +/- dollar amount. Where are these numbers included above?

Description	+/- Dollar Amount	Located in Question Number

Section VI. Insurance/Underwriting Survey

91. Annual payrolls by each of your workers' compensation class codes for the past year:

W.C. Code	Payroll
2802 (Carpentry Shop)	\$
8742 (Outside Sales)	\$
8810 (Clerical)	\$
Other:	\$
	\$

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92. **Number of employees for 2014** (add your summer peak and winter low and divide by two): _____

93. **Show the breakdown of your revenues** (make sure percentages add up to 100%):

	Description	Percentage (%)
1.	Manufacturing	
2.	Installation	
3.	Distribution	
4.	Retail	
5.	Engineering	
6.	Other (Describe):	
7.	Other (Describe):	
	Total	100%

94. Value of Owned Property (buildings and land):

a. Buildings: \$ _____

b. Land: \$ _____

95. Value of Leased Property (buildings and land):

a. Buildings: \$ _____

b. Land: \$ _____

96. Replacement Value of Owned Equipment: \$ _____

97. Replacement Value of Inventory (as of 12/31/14): \$ _____

98. Value of scheduled Vehicles: \$ _____

99. What were your total claims last year in the following:

Auto: \$ _____

Product/General Liability: \$ _____

Property: \$ _____

Workers Comp: \$ _____

100. What is your experience modification factor? _____

The experience modification factor incorporates factors that take into account company size, unexpected large losses and the difference between loss frequency and the loss severity to achieve a balance between fairness and accountability. You may need to contact your insurance provider for this information.

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Section VII. Lumber Usage Survey

How much softwood lumber did your plant consume in the construction of floor, wall and roof trusses in 2014?

Please specify: _____ million board feet.

What percent of your 2014 lumber purchases were the following species?

_____ % Southern Pine

_____ % Western Spruce-Pine-Fir

_____ % Eastern Spruce-Pine-Fir

_____ % Douglas Fir – Larch

_____ % Hem-Fir

_____ % Other species: _____

= 100 % (Must sum to 100%)

Please fill out the softwood lumber purchased table on the following page.

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What were the grade percentages of your softwood lumber purchased in 2014? Please specify percentages of all species consumed in 2014.

Grades	Species					
	Southern Pine	Western SPF	Eastern SPF	Douglas Fir	Hem-Fir	
Dense Select Structural	%	%	%	%	%	
Select Structural						
No. 1						
No. 2 Dense						
No. 2						
No. 3						
Stud grade						
MSR 1450Fb						
MSR 1650Fb						
MSR 1950Fb						
MSR 2100Fb						
MSR 2250Fb						
MSR 2400Fb						
MSR 2700Fb						
MEL M10						
MEL M14						
MEL M19						
MEL M23						
MEL M26						
MEL M30						
MEL M31						
Other grade:						
Total						100%

*Total of all species and grades must equal 100%.

Accounting Software:

What accounting software package(s) do you use?

QuickBooks ☐

MAS ☐

Peachtree ☐

Deacom ☐

ECS Pro ☐

MiTek ☐

Great Plains ☐

Other ☐ _____

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Please indicate your level of satisfaction with your accounting software:

- ☐ Very Satisfied
- ☐ Somewhat Satisfied
- ☐ Somewhat Dissatisfied
- ☐ Very Dissatisfied

Emerging Trends (Filling out this section is optional for participants)

1. Do you lease your employees? If so, what is the administrative cost as a percent of the total cost?

- a. Less than 2%
- b. 2-5%
- c. over 5%

2. Are you using any alternative energy sources?

☐ Yes (circle all that apply)

- a. Bio diesel
- b. Solar
- c. Electric
- d. Other: _____

☐ No

3. Show the breakdown of your customer base:

	Description	Percentage (%)
1.	National Builders	
2.	Regional Builders	
3.	Lumber Yards	
4.	Other	
	Total	100%

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4. Do you currently outsource the following:

a. Engineering Y or N

b. Design Y or N

5. Industry benchmark information. Please fill out each section with the TOTAL for the year 2014.

Industry Benchmarks for Trusses	Total # of Setups	Total # of Components Manufactured
Wood Roof Trusses		
Wood Floor Trusses		

Industry Benchmarks for Wall Panels	Total Interior Lineal Footage	Total Exterior Lineal Footage	Practical Maximum Wall Panel Length
Wall Panels			

6. Are you currently charging for the SBCA JOBSITE PACKAGE? ☐ Yes ☐ No

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