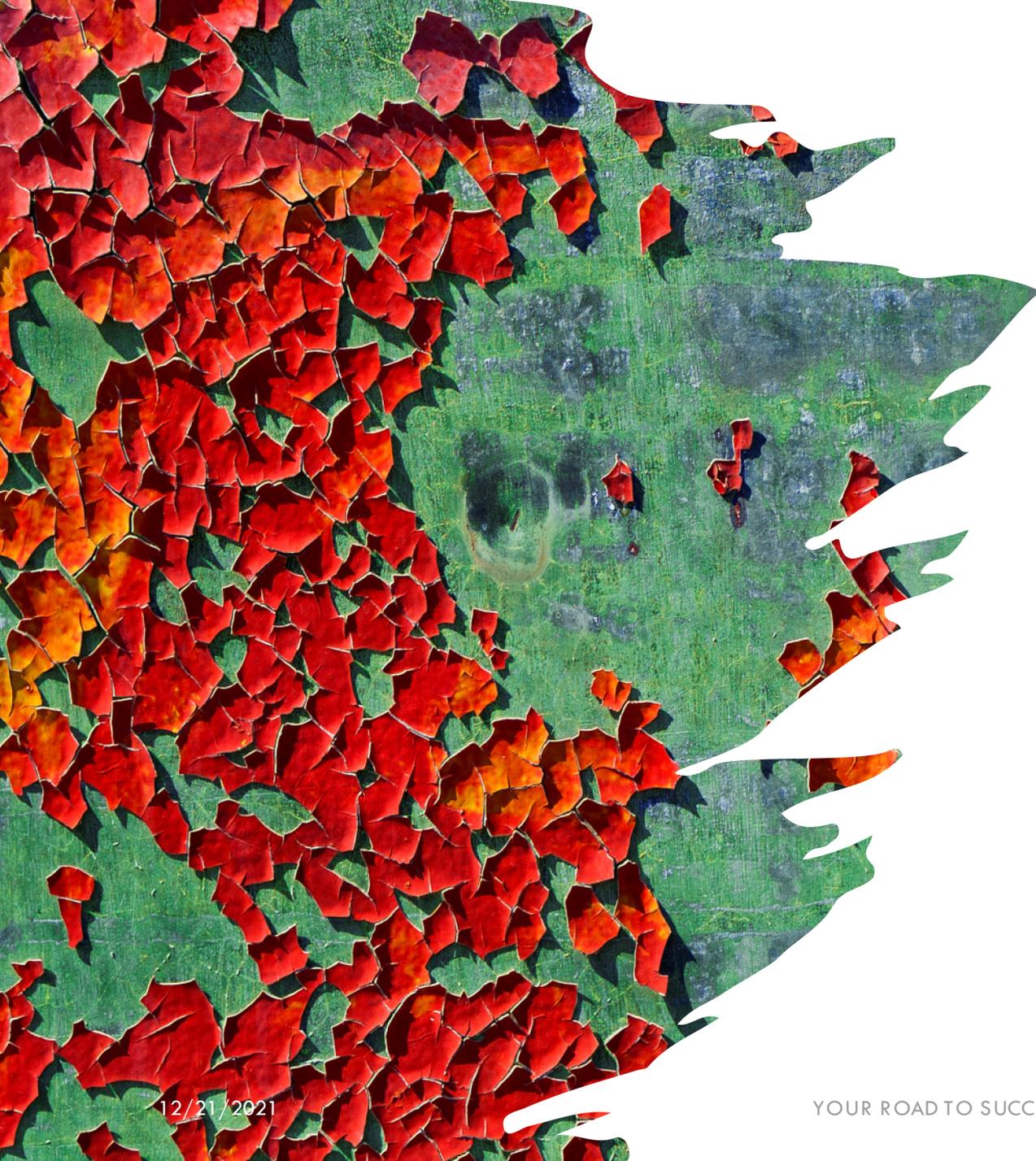




Calmentor North Region

**YOUR ROAD TO
SUCCESS WITH
CALMENTOR**





Title VI Disclaimer:

The California Department of Transportation (Caltrans) assures that no person shall, on the basis of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity receiving Federal financial assistance, as required by [Title VI of the Civil Rights Act of 1964](#)

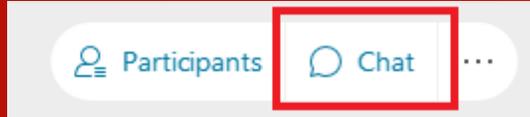
A low-angle, upward-looking photograph of a massive, rusted steel bridge tower. The structure is composed of numerous riveted steel plates, creating a complex geometric pattern of lines and dots. The tower extends from the bottom left towards the top center of the frame. In the background, several power lines stretch across a clear, light blue sky. The overall composition is dramatic and emphasizes the scale and industrial nature of the subject.

HOUSEKEEPING AND TECHNICAL SUPPORT

USING THE CHAT FEATURES IN WEBEX

TO SEND A CHAT MESSAGE:

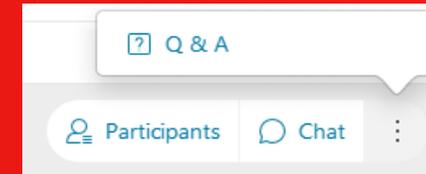
1. OPEN THE CHAT PANEL IN THE LOWER RIGHT CORNER:



2. IN THE SEND TO OR TO DROP-DOWN LIST, SELECT THE RECIPIENT OF THE MESSAGE.
3. ENTER YOUR MESSAGE IN THE CHAT TEXT BOX, THEN PRESS ENTER ON YOUR KEYBOARD.

TO SUBMIT A QUESTION VIA THE Q&A PANEL:

1. OPEN THE Q&A PANEL BY CLICKING THE “...” IN THE LOWER RIGHT CORNER:

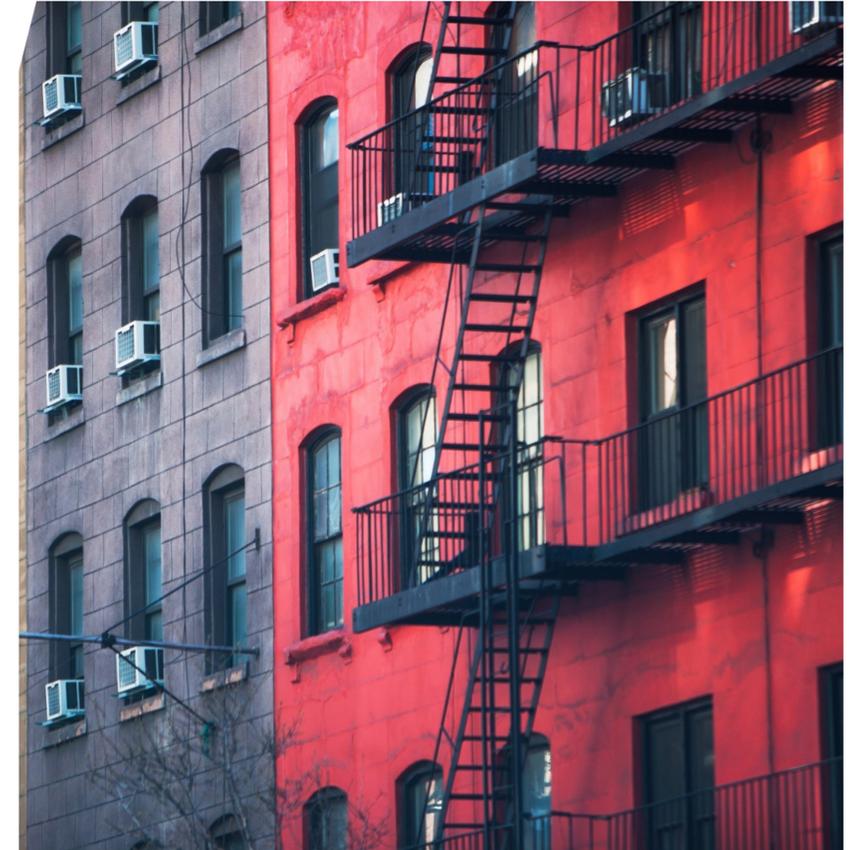


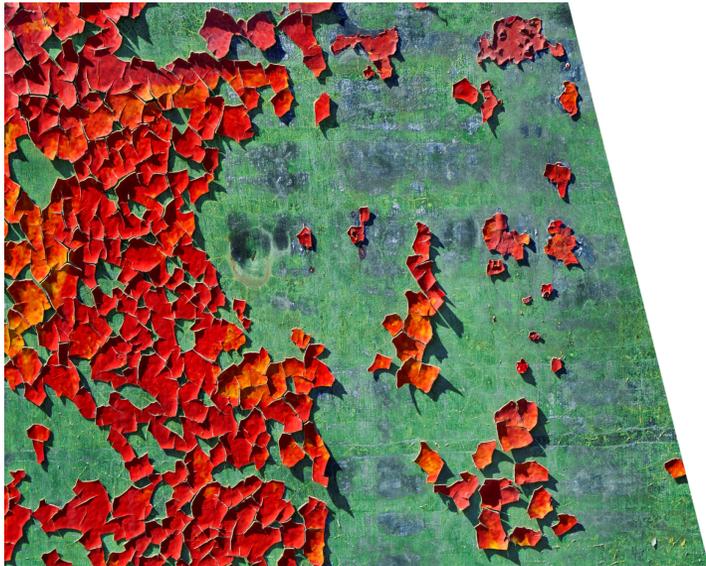
2. CLICK IN THE DROP-DOWN MENU AND SELECT “**ALL PANELISTS**”.
3. ENTER YOUR QUESTION IN THE TEXT BOX AND PRESS ENTER ON YOUR KEYBOARD.

**** BE SURE TO INDICATE IF YOU WOULD PREFER TO HAVE OUR MODERATORS ASK YOUR QUESTION, OR IF YOU'D LIKE TO BE UNMUTED TO ASK YOURSELF.**

AGENDA

- Welcome
- Introductions
- What is Calmentor?
- Committee, Mentors, and Protégés
- Pairing Process
- Expectations
- SMART Goals
- Common Misconceptions
- North Region Small Business Team
- Questions





WELCOME TO CALMENTOR

The mission of the Calmentor Program is to increase the pool of small firms participating in transportation projects by providing them opportunities to network and partner with larger, established firms.

INTRODUCTIONS

- Name
- Company
- Disciplines
- Prime or Sub
- Enter your information and best way to reach you in the chat box
- “Hi my name is Steve Mendenhall and I work with Chaudhary Associates. We do Land Surveying and Geomatics. We work as both a Prime and Sub.”

GOALS AND OBJECTIVES

- Establish a mentoring Program that pairs small firms with larger, established firms in the same field of expertise
- Enhance the growth potential of small firms
- Ensure that both small and large firms have equal opportunities to participate in transportation projects
- Establish a clear, accessible entry point for small firms that want to do business with Caltrans or other public agencies
- Develop business relationships that foster new opportunities for both large and small firms
- Encourage small firms to obtain certification from appropriate agencies
- Increase the pool of small businesses

STEERING COMMITTEE

The nine-member Steering Committee, which guides and maintains the Calmentor Program, has the following roles:

- Establishes Program goals and objectives and ensures that they are fulfilled
- Sets Program policies and procedures
- Reviews agreements
- Establishes the grievance protocol
- Helps resolve disagreements
- Evaluates Program performance
- Collects historical information on how the Program is proceeding
- Serves as an advisory body to Caltrans

STEERING COMMITTEE MEMBERS

LUIS ROBLES

Aerial Zeus

SARA CORTEZ

Stantec

ERIN MOCK

Mozamo Engineering

STEVEN ROBINSON

Wood Rodgers

PATRICK LOWRY

Alta Vista Solutions

CHARNPREET MALKA

Department of
Transportation

STEVE MENDENHALL

Chaudhary & Associates,
Inc.

CRAIG RIENBOLT

Ghirardelli Associates

VACANT

MENTORS

Mentors are established professional A&E firms willing to commit time to help a protégé firm achieve their growth potential. To be considered for Mentor status, a firm must have held contracts more than \$5 million aggregate with Caltrans, other State Agencies, or other Public Agencies. In lieu of the above requirements, a firm may be a Protégé Graduate. To retain Mentor Status, the firm, at a minimum, must have an active MOU with a protégé firm within three months of approval.

MENTOR LIST

ALTA VISTA

GHIRARDELLI
ASSOCIATES

PSOMAS

CHAUDHARY &
ASSOCIATES, INC

ICF

TRC CONSULTANTS

DOKKEN ENGINEERING

PACIFIC LEGACY

WOOD RODGERS

PROTÉGÉS

Protégés are small firms seeking to grow their business and qualify their business for future A&E contracts with Caltrans or other public agencies. To be considered for Protégé status, the firm must, at a minimum, be able to demonstrate that it could qualify to be certified as a Small Business under the State of California process. Full details about the State of California certification process may be found at

<https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division-Services-List-Folder/Certify-or-Re-apply-as-Small-Business-Disabled-Veteran-Business-Enterprise>.

Additionally, the firm must also provide services that are procured within the Caltrans A&E program and cannot qualify as a Mentor.



THE PAIRING PROCESS

STEP-BY-STEP

PAIRING

1

Mentors and Protégés submit a Cal Mentor North Region (CNR) application to Caltrans

2

The Steering Committee reviews all applications and makes decisions regarding approval

3

Caltrans posts the names of accepted Mentors and Protégés on the CNR website

4

Potential Member and Protégés meet and interview each other

5

The Steering Committee approves a Memorandum of Understanding (MOU), into which the Mentor and Protégé voluntarily enter

ESTABLISHING A FORMAL RELATIONSHIP/MOU

The Mentor/Protégé should:

1

Describe the goals and objective of the partnership

2

Develop a method or approach to achieve the goals and objective

3

Establish a mentoring duration

4

Agree on areas of support and development

EVALUATION AND FEEDBACK

Mentors and Protégés will meet on a quarterly basis to:

1

Evaluate
Mentor/Protégé
accomplishments

2

Celebrate
Mentor/Protégé
successes at annual
meetings

3

Develop a CNR
graduation process and
hold such graduations
on an annual basis

A low-angle, upward-looking photograph of a massive, rusted steel bridge tower. The tower's structure is composed of numerous riveted steel beams, creating a complex geometric pattern. The sky is a pale, bright blue, and several power lines stretch across the upper right portion of the frame. A solid red rectangular box is superimposed over the center of the image, containing the word "EXPECTATIONS" in white, bold, sans-serif capital letters.

EXPECTATIONS

MENTOR

PRESENTED BY STEVEN ROBINSON, ASSOCIATE
WOOD RODGERS

The Mentor is committed to providing an adequate amount of time, providing guidance, knowledge, and assistance to the protégé firm to support achieving business development milestones and goals contained within the MOU.

MENTOR, CONT'D

- Assign a point of contact/mentor to the Protégé;
- Attend quarterly MOU progress meetings with the Protégé;
- Review current Protégé business practices, procedures, and plans (e.g. business plan and accounting procedures);
- Attend Caltrans District 3 Jt. Professional Liaison – Cal Mentor Program
Quarterly Meetings with Protégé to facilitate new business contacts for protégé firm;
- Review Protégé firm key business indicators (e.g. cash flow, bonding, bids, and projects);

MENTOR, CONT'D

- Provide mentoring and guidance to Protégé;
- Review, approve, and submit quarterly MOU and graduation progress reports to the Caltrans District 3 Cal Mentor Program Steering Committee;
- Notify the Caltrans District 3 Cal Mentor Program Steering Committee when sufficient progress cannot be made toward MOU goals;
- Provide assistance to the Protégé for at least one year; and
- Perform other mutually agreed upon activities with Protégé.

PROTÉGÉ

PRESENTED BY ERIN MOCK, PRESIDENT
MOZAMO ENGINEERING

The Protégé is committed to participating in the mentoring relationship with the mentor firm and actively engaging the mentor firm.

PROTÉGÉ, CONT'D

- Assign a point of contact for the Mentor;
- Attend quarterly MOU progress meetings with the Mentor;
- Provide current firm business practices, procedures, and plans for Mentor's review (e.g. business plan and accounting procedures);
- Attend Caltrans District 3 Jt. Professional Liaison – Cal Mentor Program Quarterly Meetings with Mentor to facilitate new business contacts for Protégé;
- Provide information to Mentor on Protege's key business indicators (e.g. cash flow, bonding, bids, and projects);

PROTÉGÉ, CONT'D

- Define and assess its business development needs;
- Request mentoring and guidance as necessary;
- Prepare and submit quarterly MOU and graduation progress reports to Mentor;
- Will achieve MOU goals, as well as Cal Mentor Program development milestones;
- Will show development of core competencies;
- Will graduate from the program in one year;
- Notify the Caltrans District 3 Cal Mentor Program Steering Committee when sufficient progress cannot be made toward MOU goals;
- Perform other mutually agreed upon activities with Mentor.

PROGRAM DEVELOPMENT MILESTONES

1. Successfully prepare all necessary SF330 Documents for the Protégé firm;
2. Successfully implement accounting practices that are compliant with Federal Accounting Regulations;
3. Successfully attain Small Business Certification, if appropriate; and
4. Successfully foster three new business contacts.



SMART GOALS

PRESENTED BY STEVE MENDENHALL
Chaudary & Associates, Inc.

SMART GOALS

In order to assist Calmentor Mentor and Protégé firms in drafting their Memorandum Of Understanding (MOU), the Calmentor Steering Committee has developed the following “SMART Guide” as a roster of potential direct actions you **MAY** want to consider utilizing in your respective MOU.

SMART goals are:

- 1) **S**pecific
- 2) **M**easurable
- 3) **A**ttainable
- 4) **R**ealistic
- 5) **T**imely

SMART GOALS CONT'D

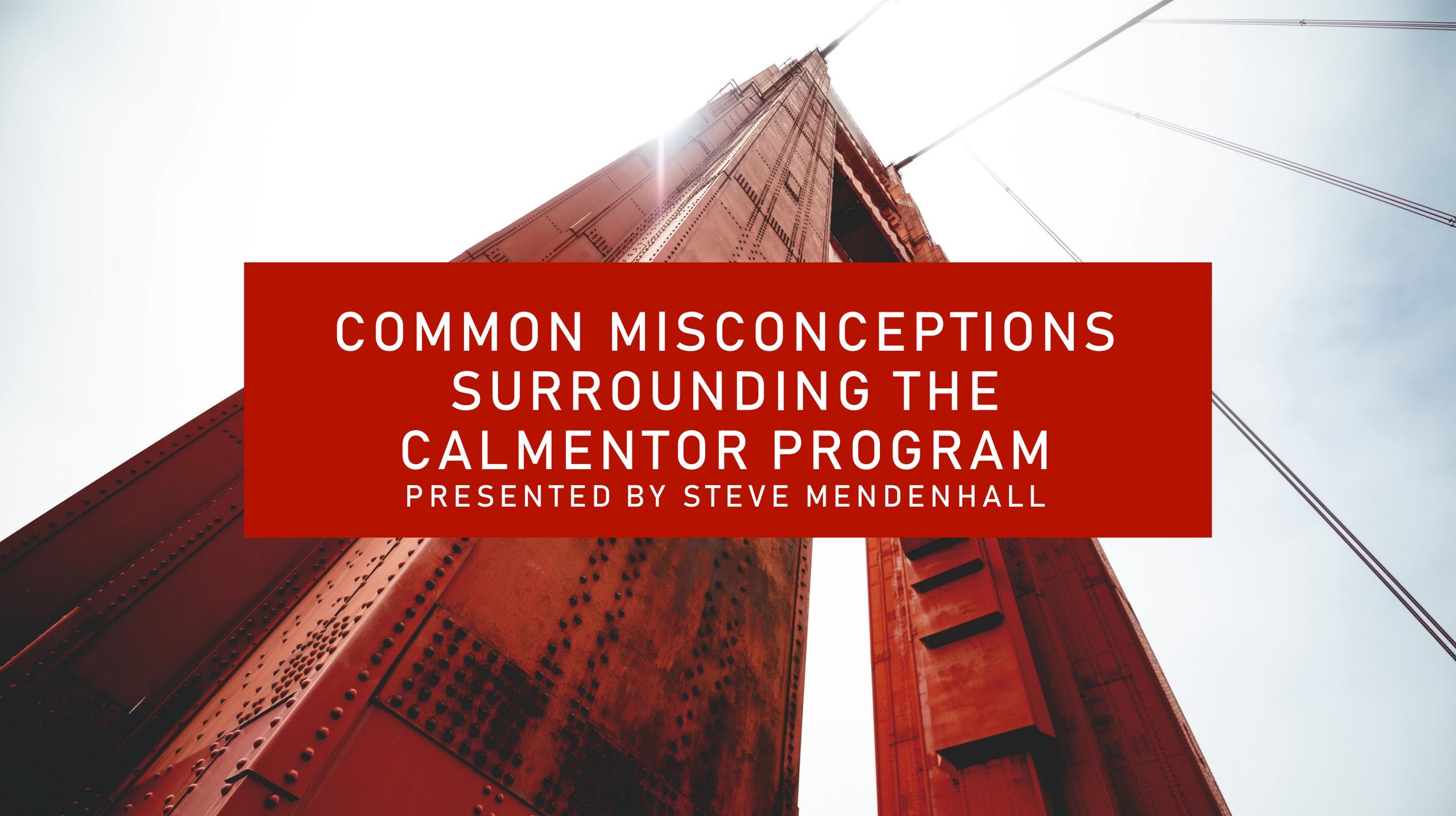
- Learn how to read RFQs and RFPs and identify the key issues and challenges to your firm
- When and how to protest a RFQ and RFP from a public agency
- Learn how to make a “go” “no-go” decision regarding RFQs and RFPs
- Learn how to read contracts and identify contract language and issues that their impact upon your firm’s ability to meet contractual requirements
- Learn how to write effective project descriptions for SF330 submittals
- Learn how to write effective resumes for SF330 submittals
- How to prepare a winning SF330 submittal
- How to position your firm for teaming opportunities
- How to identify market trends and changes

SMART GOALS CONT'D

- Using the Internet to effectively track opportunities
- Learn how to read Capital Improvement Plans and Budgets from public agencies
- Identifying organizations and associations that will help grow your company
- Expanding your company's network or contacts in the public sector
- Expanding your company's capabilities and contingency hiring
- How to prepare for an award audit from a public agency
- Understanding FAR accounting requirements
- Determining your company's benefits, overhead, and G&A costs.
- How to prepare for a cognitive audit
- How to develop a client relationship with a public agency

SMART GOALS CONT'D

- How to manage a public agency client relationship
- How to use your company's website to position and differentiate your company in the marketplace
- How to improve cash flow
- How to secure a line of credit from a financial services company
- How to produce certified payroll and invoice documentation
- When and how to prepare effective change orders



**COMMON MISCONCEPTIONS
SURROUNDING THE
CALMENTOR PROGRAM**
PRESENTED BY STEVE MENDENHALL

- “I don’t have enough time to dedicate to the program” / “Too much effort is required”
- “Pairings are permanent”
 - ❖ A new pairing can be requested if it is not a good fit between Mentor and Protégé
- “Mentors are ‘stuck’ with bad protégés”
 - ❖ The Steering Committee can help guide in a better direction
- “Mentors need to be the subject matter expert”
- “If I create an MOU, I need to bring a protégé on as a subconsultant
- “Mentors will guarantee work” or “Mentors will help to write SOQs, etc”

A low-angle, upward-looking photograph of a massive, rusted steel bridge tower. The tower's surface is covered in numerous rivets and bolts, creating a complex geometric pattern. The sky is a pale, bright blue with some wispy clouds. Several power lines stretch across the upper right portion of the frame. A solid red rectangular box is superimposed over the center of the image, containing white text.

**NORTH REGION SMALL
BUSINESS TEAM**



NORTH REGION SMALL BUSINESS TEAM

**Districts 1, 2, & 3
Small Business Liaisons**



Aaron Morgan
Eureka, CA

aaron.morgan@dot.ca.gov



Patricia Silva
Redding, CA

patricia.silva@dot.ca.gov



Robynn Spence
Marysville, CA

D3.small.business@dot.ca.gov



Districts & Counties

[District-1 - Eureka](#) (Del Norte, Humboldt, Lake, and Mendocino)

[District-2 - Redding](#) (Lassen, Modoc, Plumas, Shasta, Siskiyou, Tehama, and Trinity)

[District-3 - Marysville/Sacramento](#)

(Butte, Colusa, El Dorado, Glenn, Nevada, Placer, Sacramento, Sierra, Sutter, Yolo, and Yuba)

[District-4 - Bay Area/Oakland](#) (Sonoma, Napa, Solano, Marin, San Francisco, Contra Costa, Alameda, San Mateo, and Santa Clara)

[District-5 - San Luis Obispo/Santa Barbara](#)

(Santa Barbara, San Luis Obispo, Monterey, San Benito and Santa Cruz)



[District-6 - Fresno/Bakersfield](#)

(Madera, Fresno, Tulare, Kings, Kern)

[District-7 - Los Angeles](#) (Los Angeles and Ventura)

[District-8 - San Bernardino/Riverside](#)

(Riverside and San Bernardino)

[District-9 - Bishop](#) (Inyo, Mono, and eastern Kern)

[District-10 - Stockton](#) (Alpine, Amador, Calaveras, Mariposa, Merced, San Joaquin, Stanislaus and Tuolumne)

[District-11 - San Diego](#) (San Diego and Imperial)

[District-12 - Santa Ana](#) (Orange)



District Small Business Liaisons (DSBL)

Located in all 12 districts

Primary contact for small business-related concerns

- Information about Small Business (SB), Disabled Veteran Business Enterprise (DVBE), and Disadvantaged Business Enterprise (DBE) certification and programs

Outreach

- Community events and activities
- Education regarding how to work with Caltrans
- Provide 1:1 technical assistance to firms

Advocacy services

- Concerns and complaints



DSBL Contact List:

<https://dot.ca.gov/programs/civil-rights/dsbl-contact-list>



Certifications Recognized by Caltrans

State Funded Projects

(When project funding is ONLY state dollars)

- Small Business (SB)/Small Business - Public Works (SBPW)
 - **25% Goal**
- Disabled Veteran Business Enterprise (DVBE)
 - **5% Goal**

Federally Funded Projects

(When projects have ANY AMOUNT of federal dollars)

- Disadvantaged Business Enterprise (DBE)
 - **22.2% Goal**



SB & SB-PW Eligibility Requirements

Small Business (SB)

- Independently owned and operated
- Not dominant in field of operation
- Principle office located in California
- Owners must live in California
- Have 100 or fewer employees and an average annual gross receipts of \$15M or less over the last 3 tax years

Small Business – Public Works (SB-PW)

- Independently owned and operated
- Not dominant in field of operation
- Principle office located in California
- Owners must live in California
- Have 200 or fewer employees and an average annual gross receipts of \$36M or less over the last 3 tax years



Disabled Veterans Business Enterprise (DVBE) Eligibility Requirements

- Must have a service-connected disability of at least 10%
 - U.S. military, naval, or air service
- Must be at least 51% owned by one or more disabled veteran
- Must reside in California
- Must be managed/controlled by disabled veteran



SB/DVBE CERTIFICATION

Visit:

<https://www.caleprocure.ca.gov/pages.index.aspx> to apply for SB/DVBE Certification

- Navigate to the “Get Certified” section

Office of Small Business & Disabled Veteran Business Enterprise Services (OSDS)

OSDSHelp@dgs.ca.gov

(916) 375-4940

Hours: 8am to 5pm

The screenshot shows the homepage of the California State Government Marketplace. The header includes the Cal eProcure logo and navigation links for Home, Resources, Quick Links, and Help. A search bar for the California State Contracts Register (CSCR) is visible. The main content area features a grid of four service tiles under the heading 'How do I...'. The 'Get Certified' tile, which includes a person icon and a right-pointing arrow, is highlighted with a red border. The other tiles are 'Sell to the State' (with a dollar sign icon), 'Find Public Procurement Information' (with an information icon), and 'Find Training and Resources' (with a book icon).



Disadvantaged Business Enterprise (DBE) Eligibility Requirements

- Must be at least 51% owned by one or more socially & economically disadvantaged individual
- Must be a for-profit small business
- Personal net worth of \$1.32M or less
- Must be managed/controlled by DBE individual and a U.S. Citizen
- Average annual gross receipts for the 3 previous fiscal years cannot exceed \$26.29M



DBE CERTIFICATION

For more information, visit:
<https://dot.ca.gov/programs/civil-rights/dbe>

Caltrans – Office of Civil Rights
Small Business Advocate
SmallBusinessAdvocate@dot.ca.gov
(916) 324-6900

Outreach & Supportive Services Branch

<https://dot.ca.gov/programs/civil-rights/dbe>

The screenshot shows the Caltrans website header with the CA.GOV logo and "About Caltrans" link. The main navigation includes "Travel" and "Work with". The breadcrumb trail is: Home | Programs | Civil Rights | Disadvantaged Business Enterprises (DBE). The page title is "Disadvantaged Business Enterprises (DBE)". The main heading is "DBE Federal Program". Under "How do I..", there is a list of links: "Become DBE Certified", "Find a DBE Certified Firm", "Find Participation Reports (DBE & DVBE)", "Find US DOT Certifying Agencies", and "Submit a No Change Declaration". Under "Other DBE Resources", there is a list of links: "DBE Application Tripwires", "DBE Complaint Form", and "DBE Federal Resources".



RESOURCES

- Caltrans Website

<https://dot.ca.gov/>

- Office of Civil Rights Website

<https://dot.ca.gov/programs/civil%20rights>

- Outreach Events Calendar

<https://dot.ca.gov/programs/civil-rights/caltrans-events-calendar>

- Contractor's Corner

<http://ppmoe.dot.ca.gov/des/oe/contractor-info.html>

- Cal eProcure – California's Online Marketplace

<https://caleprocure.ca.gov/pages/index.aspx>

SMALL BUSINESS CONTACT INFORMATION

District 1, Small Business Liaison

Aaron Morgan

(707) 296-4063

Aaron.morgan@dot.ca.gov

District 2, Small Business Liaison

Patricia Silva

(530) 338-4411

Patricia.silva@dot.ca.gov

District 3, Small Business Liaison

Robynn Spence

(530) 720-1687

D3.small.business@dot.ca.gov



Statewide DSBL Contact List:
<https://dot.ca.gov/programs/civil-rights/dsbl-contact-list>

A close-up photograph of a red metal structure, possibly a ladder or scaffolding, with a black metal rod or pipe running diagonally across the frame. The background is blurred, showing more of the red structure.

QUESTIONS

Please put all questions in the Q&A Panel. If you would like to ask this question out loud, please notate in the chat box and be courtesy of others.





THANK YOU

Please remember to share your contact information.

If you have any questions, please email Kayla.Miller@dot.ca.gov

Mentor and Protégé forms can be found below.

<https://dot.ca.gov/caltrans-near-me/district-3/d3-popular-links/d3-calmentor>