

Welcome to Division of Engineering Services

A&E Materials Engineering & Testing Services Oversight Outreach for Contract 59ANew1192

If you have not already registered, please provide the following information in the chat box:

- Name
- Firm
- Email
- Phone

Friday April 25, 2025

10:00AM – 12:00PM

Virtual Outreach via WebEx

## Agenda

- General Information Sharing
- Calmentor program
- Office of Civil Rights – Opportunities for DBEs
- DPAC Updates – Procurement Process
- Contract Requirements & Overview
- Wrap Up - Question Submission:
  - Please send questions to EVERYONE in the chat box
  - Official responses to be posted on DPAC website

\*The Attendees List (including contact information) will be posted on the DPAC website

## Title VI

- Caltrans ensures that no person in the state of California is excluded from participation in, denied the benefits of, or otherwise subjected to discrimination in Caltrans programs, policies, procedures, activities, and services on the grounds of race, color, national origin, sex, age, or disability.
- For more information on Title VI of the Civil Rights Act of 1964 at Caltrans, please visit: <https://dot.ca.gov/programs/civil-rights/title-vi>.

### Disclaimers

The information provided in this event does not constitute a solicitation or offer of any contract with Caltrans.

For this outreach, the scope of work, personnel classifications, duties, contract amount, schedule, and all aspects of the contract are not final. Information provided is preliminary and subject to change.

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Calmentor

Enhancing the growth potential of small business

Jane Yao PE

Senior Transportation Engineer

Caltrans District 4 Office of Consultant Services

### Mission

Seeks to increase the pool of qualified small A&E firms available for public sector transportation projects by providing them opportunities to network and partner with established firms..

- Purpose
  - To meet Governor's Executive Order S-11-06 requirements.
  - To support and implement a small business A&E mentor-protégé program in all Districts.
  - To encourage, and whenever possible increase, Small Business participation, including Disadvantaged Business Enterprises in highway and transit-related projects.
- Goal

Facilitates 12-month pairings between Mentors and Protégés that enhance knowledge, qualifications, readiness, and capacity of Protégés to perform work on public transportation sector projects

### How The Program Works ?

1. Protégé Firm Membership Qualifications Determination.
2. Complete & Submit Protege Membership Application Form.
3. Review Program Welcome Kit after membership approval.
4. Identify and submit names of 3 potential Mentors to support the goals listed on application form.
5. Attend Quarterly Mixer Events.
6. Take Advantage of Program's Networking & Training Opportunities with other A&E Firms and Public Agencies.
7. Prepare MOU with a Mentor Firm.
8. Work on milestones and goals for a 12-month mentor-protégé relationship.

### Program Achievements

- Total Number of membership 137
- Foster Partnership with Local Public Transportation Agencies
- 8 pairings for mentor and Protege
- 55 protégé firms are Disadvantaged Business Enterprise
- 24 Caltrans Contracts valued at \$307M Awarded to Members Since 10/2021
- Graduated 81 protégé Firms.

## CONTACT INFORMATION

Jie (Jane) Yao , P.E., D4 Calmentor Program Manager

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or

Guadalupe Watson, D4 Calmentor Program Facilitator

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## WEB RESOURCES

D4 Calmentor website <https://dot.ca.gov/d4-calmentor>

Caltrans Look Ahead Report <https://dot.ca.gov/programs/procurement-and-contracts/ae-contract-information>

Caltrans Division of Procurement and Contracts (DPAC)  
<https://dot.ca.gov/programs/procurement-and-contracts>

## Oversight Project Contract

- Contract #59ANEW1192
- \$5M / 3 years
- METS Oversight
  - Award, Advertise, Administered by Local Agencies
- Mohammed Shamol, P.E.

Seyedhamed Sadati, P.E

- Steven Seifert, P.E.

Justin Ellis, P.E

## Topics

- Oversight Duties
  - Scoping Documents
  - Monthly Reports
  - QMA Audits
  - Process Summary



## Scoping Documents

- Co-operative Agreement
- Source Inspection Quality Management Plan (SIQMP)
- Project Plans and Specifications

### Co-Operative Agreement

- Agreement between Local Agency and Caltrans
- Defines Roles and Responsibilities
- Identifies Responsible Project Funding Parties

## Quality Management Plan

### Source Inspection Quality Management Plan

- Certified Personnel
- Material Control Process
- Level of Quality

### Monthly Summary Reports

- Verify Continued Compliance with the SIQMP
- Review Summary of Verification Source Inspection Work
- Review Summary of Non-Conformance Reports
- Review Changes to the Plans or Specifications

## QMA Audits

- Audit Frequency
- Check for Compliance
- Communicate Findings
- QMA Report

### SIGLA Manual

- Source Inspection Guidelines for Local Agencies
- Template and Guidance for creation of SIQMP

<https://dot.ca.gov/-/media/dot-media/programs/engineering/documents/mets/sigla-manual-a11y.pdf>

## Guidance Manuals

- Oversight Resident Engineers Guidelines

<https://dot.ca.gov/-/media/dot-media/programs/construction/documents/policies-procedures-publications/oversightguidelines.pdf>

- Construction Manual Supplement for Local Agency Resident Engineers

<https://dot.ca.gov/-/media/dot-media/programs/construction/documents/policies-procedures-publications/construction-manual/cm-supplement-lare-a11y.pdf>

- Local Agency Structure Representative Guidelines

<https://dot.ca.gov/-/media/dot-media/programs/construction/documents/policies-procedures-publications/lasr-guidelines.pdf>

### Oversight Process Summary

- Cooperative agreement with Local Agency and Caltrans established
- Local Agency submits SIQMP to Caltrans METS
- State Materials Engineer Reviews SIQMP
- Construction begins and Local Agency performs Quality Assurance
- Local Agency submits monthly report to METS
- METS conducts periodic audits
- Local Agency RE submits a letter of final materials acceptance and certification to METS
- METS verifies project compliance and issues closeout letter



### Key Takeaways

- Compliance with State, Local, and Federal Regulations
- Conflict of Interest
- Roles and Responsibilities

## Questions

## Caltrans Small Business Program Overview

Dalia Demian

Office of Civil Rights

Statewide Outreach Branch

#### SB/SB-PW/DVBE Certification Benefits

- 5% bid preference for SBs
- Up to 5% incentive for DVBEs
- Exclusive contract opportunities
- Prompt Payment
- Reciprocity Partners
- Work with prime contractors

#### DBE Certification Benefits

- Recognized by sub-recipient local agencies in California.
- Firm listed in the CUCP database
- California Unified Certification Program (CUCP)
- Recognized by Local Agencies
- Invitations to Procurement Fairs, Pre-Bids, and other outreach events

### Am I eligible?

- Small Business (SB) and Small Business Public Works (SB-PW)
  - Independently owned & operated
  - Not dominant in the field of operation
  - Principle office located in California
  - Owners must live in California

#### Am I Eligible? Cont.

- Disabled Veteran Business Enterprise (DVBE)
  - Must have a service-oriented 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 a disabled veteran

### Am I Eligible? Cont.

- Disadvantaged Business Enterprise (DBE)
  - Must be at least 51% owned by one or more socially & economically disadvantaged individuals
  - Must be a for-profit small business
  - Personal net worth of \$2.047 M or less
  - Must be managed/controlled by a DBE individual & U.S. Citizen
  - Average annual gross receipts for the 5 previous fiscal years cannot exceed \$30.72 M



## How To Get Certified?

- SB/DVBE
  - Department of General Services, Cal eProcure website
  - Apply online & submit documents electronically
- DBE
  - Caltrans CUCP Online Certification website or contact 1 of 10 CUCP agencies
  - Submit your application online at <https://caltrans.dbesystem.com/>

### Caltrans Districts and 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)

### Caltrans Resources

- Connect with your local District Small Business Liaison (DSBL)
  - One-on-One Assistance – Discuss strategies for working with our agency
  - Technical Assistance – Provide technical assistance to our small businesses
  - Public Outreach Opportunities – To encourage small business participation in contracts and procurements
  - Resource for Caltrans Staff – Connect our District Staff who have purchasing and contracting needs with our small businesses

## Opportunities

- 1:1 Meetings
- Mandatory Pre-Bid Meetings
- Minor Program

### What's Next? Cont.

- Attend outreach events
  - Caltrans Events Calendar - <https://dot.ca.gov/programs/civil-rights/caltrans-events-calendar>
- Find Caltrans projects and contracts to bid on
  - Cal eProcure – <https://caleprocure.ca.gov/pages/index.aspx>
  - Contractor's Corner - <http://ppmoe.dot.ca.gov/des/oe/contractor-info.html>

## Business Resources

- Caltrans Events Calendar
- <https://dot.ca.gov/programs/civil-rights/caltrans-events-calendar>
- Statewide Resources
- <https://dot.ca.gov/programs/civil-rights/business-resources>
- Caltrans Contractor's Corner
- <http://ppmoe.dot.ca.gov/des/oe/contractor-info.html>

Division of Procurement and Contracts (DPAC)

[A&E Contract Process Overview - November 2024 - YouTube](#)

Questions can be sent to the AE Customer Service email: [AE.Customer.Service@dot.ca.gov](mailto:AE.Customer.Service@dot.ca.gov)



## Websites

Caltrans website:

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

Caltrans, Division of Procurements and Contracts (DPAC) A&E website:

<https://dot.ca.gov/programs/procurement-and-contracts>

Look Ahead Report:

<https://dot.ca.gov/programs/procurement-and-contracts/ae-contract-information>

### Networking & Partnering Opportunity

- A list of today's attendees will be posted on the DPAC Website with Prime-Consultants and Sub-Consultants for your reference.
- Utilize the list to form your potential team partners.
- Are you planning to be a:
  - Prime or sub-consultant

### Questions?

Compose your questions in the chat box to EVERYONE.

Outreach information including questions and answers will be posted on DPAC A&E website:

[https://dot.ca.gov/programs/procurement-and-contracts/ae contract-information/a-e-outreach-events](https://dot.ca.gov/programs/procurement-and-contracts/ae%20contract-information/a-e-outreach-events)