Agenda

- Introductions
- Line Card
- Effective Teaming
- Trends in Procurement/P3s
- Action Items

Calmentor Central Region
January 24, 2017
Introductions

- Name/Company Name
- Certifications
- Key Words About Your Business
Line Cards

*Increasing Your Competitive Edge*

- Communicate
  - Capability
  - Capacity
  - Availability

- Tailored to the Opportunity/Recipient
  - Relevancy
  - Similarity
Line Cards

What is in a Line Card

• 12 distinct data points
  ▪ Company name, address, etc..
  ▪ POC name, email, direct
  ▪ Services/Specialties
  ▪ Licenses
  ▪ Certifications/Work Codes
  ▪ Insurance/Bonding
Line Cards

What is in a Line Card (continued)

• Data points
  ▪ Safety
    (Experience Modification Rate)
  ▪ Number of Years in Business
  ▪ Number of Employees
  ▪ Project Examples
  ▪ References
  ▪ Value Statement
Value Statement –
How can you help win the bid/contract/project?

• Why your firm has the………
  ▪ Technical Expertise
  ▪ Relationship with Project Owner
  ▪ Relationship with Prime
  ▪ Price
  ▪ Geographic Location/Proximity to the Project
Line Cards – Example 1

Improving the nation’s transportation infrastructure

Acumen Building Enterprise, Inc. is a fast growing professional consulting firm focused on transit-systems engineering, construction management and operations, and maintenance of major systems for transit, heavy rail, schools and hospitals. We are a small, flexible firm with California roots, a global reach and, when it comes to client support, oversized goals.

Profile

- Infrastructure Management
- Intelligent Transportation Systems
- Technical Communications

NAICS CODES: 236220, 541330, 541511, 541512, 541513, 541519, 541611, 541614, 561210

Projects

1. San Francisco Bay Area Rapid Transit District (BART), West Dublin and Pleasanton, CA: BART On-call General Engineering Services, West Dublin/ Pleasanton Claims Analysis Services
2. California Department of Transportation (Caltrans), Sacramento, CA: GoCalifornia Industry Capacity Expansion (ICE) Action Plan
3. Caltrans, Sacramento CA: Task Order Number 9, Specification Uniformity Plan Implementation
4. BART, Oakland, CA Procurement of Card Readers
5. BART, Oakland, CA Automatic Fare Collection (AFC) Modernization Program
6. BART, Oakland, CA Development and Maintenance of Bill-To-Bill Changer
7. Port of Oakland, Oakland, CA Berths 55-56 Wharf and Phase I of Container Yard
8. Metropolitan Transportation Commission, Oakland, CA: TransLink® Engineering and Installation Oversight

Business Info

- Years in Business: 17
- Total Employees: 45

Insurance:

- Errors & Omissions

Certifications:

- SBE
- DVBE
- DBE
- LBE (Oakland)

Clients

1. San Francisco Bay Area Rapid Transit District
2. California Department of Transportation
3. Port of Oakland
4. Metropolitan Transportation Commission
5. San Francisco Municipal Transportation Authority
6. Washington Metropolitan Area Transit Authority
7. Naval Facilities Engineering Command
8. Yuma County Area Transit/Yuma Metropolitan Planning Organization
9. Los Angeles County Metropolitan Transportation Authority
10. Massachusetts Bay Transportation Authority
Cal-Con Pumping, Inc.
Contact: Julie Berry
Address: 1 Avenue of the Palms, Suite 212, San Francisco, CA 94130
Phone: 415-401-9838  Fax: 415-401-7864
Email: julie.berry@calconpumping.com

PROFILE:
Cal-Con Pumping, Inc. is a “woman owned” concrete pumping business that has over 40 years experience in the construction industry. We provide our customers with state-of-the-art equipment, experienced and safe operating engineers and efficient back office administration that allows us to “pump profit” into our customer’s business.

SERVICES:
Concrete Pumping
Concrete Form and Finish
Relevant NAICS Code: 238110

AFFILIATIONS:
■ AGC Member
■ National Association of Minority Contractors-Committee Chair
■ Caltrans Construction Mentor Protegé Program
■ Signatory to Operating Engineers and Laborers Union

BUSINESS INFO:
Years in Business: 5 Years
Total Employees: 10

HONORS:
California 2011 Small Business of the Year Award
3rd Senatorial District - Senator Mark Leno

CERTIFICATIONS

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<th>Cert. Date</th>
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<td>Vendor: 75096</td>
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<td>SBE Micro</td>
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<td>Supplier: 51072</td>
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LICENSES & INSURANCE:
■ C-5 License (962387)
■ Workers Comp ■ General Liability ■ Automobile ■ $2 Million Excess Liability Policy

PROJECTS:
- Doyle Drive/Presidio Parkway
- BART Warm Springs Extension
- San Francisco General Hospital
- Alameda High Street Bridge
- eBART Transfer Platform
- Highway 4 - Somersville
- Transbay Transit Center
- Kaiser Oakland Hospital
- Sunnyvale Auxiliary Sewer Tunnel
- San Francisco International Airport

CLIENTS:
- C.C. Myers, Inc.  Malcolm Drilling
- Shimmick  Hillside Drilling
- Skanska  RGW Construction
- Nibbi Brothers  Yerba Buena
- Webcor  
- Turner Construction
- R.L. Brosamer  
- Ballfour Beatty  
- R.M. Harris  
- Flaitron

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Line Cards – Example 3

**WHO WE ARE**

All-in-One Architecture, Landscape Architecture, Civil and Structural Engineering design powerhouse.

Over 100 years of collective experience between 4 multi-disciplinary trained and certified partners.

A young-minded firm with seasoned direction in providing innovative design solutions in built environment.

**CERTIFICATIONS**

State of California
Small/Micro Business (1075304)
City and County of San Francisco
LBE (HRCO8131618 - pending renewal)
Green Business Program in City and County of San Francisco
Woman- and Minority- Owned Business
Registered with CCR (Central Contractor Registration)

**THE NUMBER GAME**

DUNS 831113894

Industry Codes
NAICS 541320 Landscape Architectural Services
541310 Architectural Services
541410 Interior Design Services
541330 Engineering Design Services
541320 Planning
NIGP 90600, 90607 Architect Services, Professional
90656 Landscape Architecture
90700 Architectural and engineering services, non-professional
90714 Architectural Services, Non-Licensed (Not Otherwise Classified)
91815 Architectural Consulting
SIC 8712 ARCHITECTURAL SERVICES

Our downloadable portfolio is available online at: www.que-arch.com
**EXARO TECHNOLOGIES CORPORATION**

**Contact** Hector Dominguez  
Phone 650-777-4324 Fax 650-777-4326  
Email hdom@exarotec.com  
Address 1831 Bayshore Hwy Burlingame, CA 94010  
Website www.exarotec.com

### PROFILE
EXARO Technologies is your “One Stop Shop” for all your Utility Locating needs which includes vacuum excavation, electronic detection, ground penetrating radar, concrete rebar /conduit scanning. What sets EXARO apart? “We Know Underground Infrastructure”. In addition EXARO Technologies Corporation has an Excellent Safety Record with “0” Injuries and “0” Lost Workdays.

### SERVICES
- Utility locating by vacuum excavation, ground penetrating radar & electronic detection
- Concrete Rebar Scanning
- Water Leak Detection
- Cathodic Protection Installation

### CERTIFICATIONS, LICENSES & INSURANCE
- SBE  
- LBE  
- DBE  
- MBE  
- Class A, Hazardous Substances Removal Certification  
- Errors & Omissions  
- Bid Bond  
- Performance Bond  
- Payment Bond  
- Workers Comp  
- General Liability  
- Automobile

### BUSINESS INFO
- Years in Business: 6 Years
- Total Employees: 11

### BUSINESS PROFESSIONAL ASSOCIATIONS/AFFILIATIONS
- Laborer’s International  
- CA Regional Common  
- ASCE  
- Ground Alliance (CGA)  
- NACE  
- Committee  
- Pipeline User Group

### PROJECTS
- Park Presideo Project  
- BART Safety Seismic Retrofit Program  
- VTA Silicon Valley Berryessa Extension Project  
- BART Warm Springs Project  
- PG&E 110 kV Transmission Underground Cable Replacement San Francisco  
- San Bruno Grade Separation Project  
- Berkeley Lawrence National Lab Project  
- San Jose Airport New Parking Lot Project  
- Marin Municipal Water District Cathodic Protection Replacement Project  
- Caltrans Heker Pass (152) Project

### CLIENTS
- Valley Transportation Authority  
- AECOM  
- Pacific Gas & Electric Co.  
- Caltrans  
- Balfour Beatty  
- Valentine Corporation  
- HNTB Corporation  
- EBMUD  
- BART  
- Stanford Linear Accelerator
**Line Cards – Example 5**

**Nakama Enterprises LLC**

**We Pledge...**
To always work in your best interests, to partner with you openly and honestly, and to foster relationships built on trust and respect.

**We can help...**
Meet your diversity supplier targets ♦ Fill subcontractor needs for Federal, State and Private Sector contracts

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<th>Company Info</th>
<th>NAICS Codes</th>
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<td>541922 541990</td>
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**CERTIFICATIONS**

- ♦ Woman-Owned Business
- ♦ Small Business Enterprise
- ♦ Economically Disadvantaged Woman-Owned SB (EDWOSB)

- ♦ Supplier #1472800
- ♦ Certified Small Business
- ♦ CA Unified Certification Program Disadvantaged Business Enterprise (CUCP DBE) (in process)

- ♦ National Minority Supplier Development Council (NMSDC) Certified Minority Business Enterprise
- ♦ Project Management Institute (PMI) Member #1953219

**Does your business need to:**
- Grow?
- Be more competitive?
- Operate more efficiently?
- Productively? Predictably?

Ask how our Management Consulting team can help!

**Nakama Enterprises LLC**

AERIAL PHOTOGRAPHY/CONSTRUCTION

Annette Maxwell, PMP  
Founder, CEO

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Fax: +1 888.489.3614  
annette@nakama-e.com  
7195 Brooktree Court  
San Jose, CA 95120  
www.nakama-e.com
Effective Teaming Strategies

**Six Step Process**

1. Define Your Business
2. Intelligence Gathering
3. Identifying Opportunities
4. Networking and Teaming
5. Branding
6. Effort
Effective Teaming Strategies

Step 1 – Defining Your Business

- What do you do?
- Is there a demand for what you do?
- Who needs your service?
- How are your services purchased?
Effective Teaming Strategies

Step 1 – Defining Your Business (continued)

- Define your geographical territory
- Match your services with marketplace opportunities and needs
- Understand who your clients are
  - Primes (A&E or Contractor)
  - Public Agencies
Effective Teaming Strategies

Step 2 – Intelligence Gathering

- Internet Research
  - Clients
  - Capital Improvement Plans
  - Annual Budgets
  - Market Segments
- Associations and Affiliations
- Client Events
- Networking

Follow The Money!
Effective Teaming Strategies

Step 3 – Identify Opportunities

- Websites
- Print Media
- Associations
- Existing Relationships
- Meeting with Future/Potential Clients
- Budgets and CIPs
Effective Teaming Strategies

Step 4 – Networking

- Invest and Develop Professional Relationships
- People do business with people who they know/trust/respect
- Define your value
- JV
- Subcontract
- SBE/DBE/DVBE Certifications and Work-Codes
Effective Teaming Strategies

Step 5 – Branding

- Market Recognition
- Performance
- Technical Capabilities
- Responsiveness
- Website
  - Letters of Recommendation
- Newsletters
- Awards
Effective Teaming Strategies

Step 6 – Effort or “Be Prepared to do the Heavy Lifting!”

- Read the bid documents and specifications
- Identify SOW
- Understand contract requirements
- Make a go/no go decision
- Attend pre-bid meetings with an objective
- Sell yourself and your firm
- Follow Up
- Persistence
A public–private partnership (PPP, 3P or P3) is a cooperative arrangement between one or more public and private sectors, typically of a long term nature. Governments have used such a mix of public and private endeavors throughout history. However, the past few decades has seen a clear trend towards governments across the globe making greater use of various PPP arrangements.
Public Private Partnership

- Common themes of PPPs are the sharing of risk and the development of innovative, long term relationships between the public and private sectors.
- The use of private finance is another key dimension of many PPPs.
- The PPP phenomenon has been controversial.
TRENDS IN PROCUREMENT – P3

Doyle Drive Replacement Project – Phase II – P3

- Significantly changed the DBE/SBE/DVBE Program
- Public Agency loses significant power in overseeing the DBE/SBE/DBE Program
- Significant shift in project priorities
- Developing the pool of qualified DBE/SBE/DVBEs shifts
- Development of DBE/SBE/DVBE program in contract language becomes critically important
Regional Example: UC Merced

- Four Year Project
- Nearly doubling the physical capacity of UC Merced by the year 2020
- Will allow the campus to grow to 10,000 students
- $1.14 Billion in value
- Plenary Properties Merced (PPM)
Regional Example: UC Merced

- 30% SBE/3 % DVBE of ‘Contract Value’
- Bid Price: $1,000,000
  - ($50,000) Overhead
  - ($100,000) Profit
  - ($600,000) Materials/installed equipment/supervision)
  - ($250,000) balance remaining
- Contract Value subject to the SBE/DVBE goal: $250,000
- Value of the work to be performed by an SBE/DVBE
- $75,000 (labor only)
TRENDS IN PROCUREMENT – P3

DBE/SBE/DVBEs Succeeding in a P3 World

- Qualifications
- Relationships
- Research
- Ability to communicate ‘solutions’
- Performance!
Contact Information

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Pendergast Consulting Group

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San Francisco, CA 94130
415-621-0600

paul@pendergastconsultinggroup.com