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# *CalMentor*

## *A & E Small Business Mentoring Program*



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Table of Contents

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I. INTRODUCTION .....1

II. MISSION STATEMENT .....1

III. PROGRAM GUIDELINES .....1

    Section 1 Location .....1

    Section 2 Participants.....2

        A. Mentors .....2

        B. Protégés.....2

        C. Program Sponsors .....2

    Section 3 Program Structure .....2

        A. Pairing Process.....2

        B. Establishing a Formal Relationship .....3

        C. Evaluation and Feedback .....3

        D. Recognition .....3

    Section 4 Administration .....3

        A. Maintenance .....3

        B. Dispute Resolution.....3

        C. Recruitment.....4

        D. Meetings.....4

IV. Section 5 Steering Committee .....5

    A. Composition.....5

    B. Function .....5

## **Section 5   Steering Committee**

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The Steering Committee is created to help guide and maintain the Calmentor program. The role of the steering committee is as follows:

- ◆ Collaboratively manage all aspects of the Calmentor program including development, marketing, implementation, and maintenance of the program.
- ◆ Ensure the success by monitoring, providing feedback, and reporting on Program Performance.
- ◆ Provides support in reviewing the agreements.
- ◆ Assists with resolution of potential disagreements.
- ◆ Sets the policies and procedures for the program.
- ◆ Suggestions to improve the Program in future years.

The following is the composition and function of the Steering Committee:

### **A.   Composition**

The Steering Committee for the Calmentor Program consists of two Caltrans District 11 representatives, two SANDAG representatives, four ACEC members, two representatives from other public agencies, and two representatives from the Caltrans District 11 Small Business Council.

### **B.   Function**

The Steering Committee has the authority and the responsibility to direct and manage all affairs of the Calmentor Program.

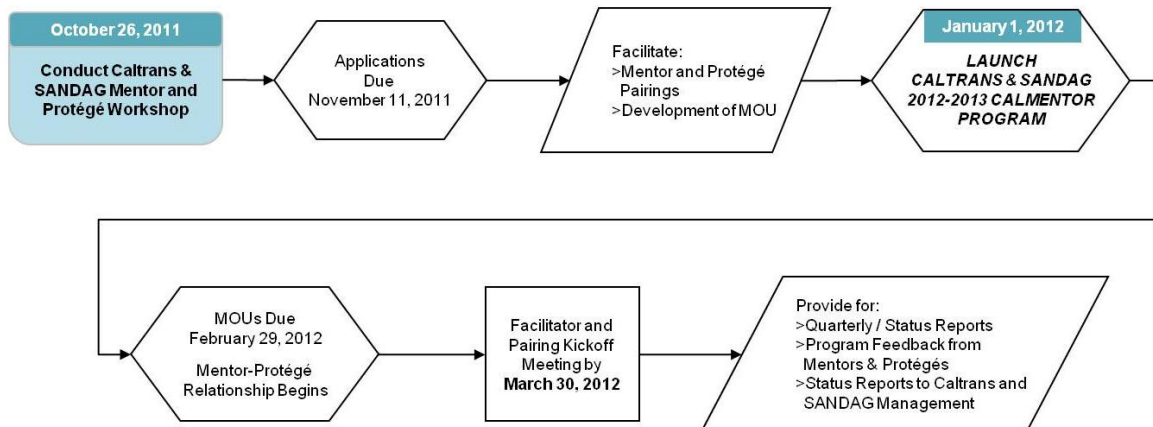
**C. Recruitment**

- ◆ Communicate to other professional societies about the program.
- ◆ Inform potential participants of the website.
- ◆ Participate in the program kick-off meeting and awards event.
- ◆ Maintain and distribute a program brochure.

**D. Meetings**

Monthly meetings are held for feedback, evaluation, and monitoring of the program. Program cycle events include a kick-off meeting, awards event, and other informational programs for networking, recognition, and recruitment.

**Calmentor**  
**2012-2013 Mentor-Protégé Program Plan**



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## I. Introduction

The California Department of Transportation (Caltrans) District 11 and the San Diego Association of Governments (SANDAG) are pleased to invite your firm to participate in the Calmentor mentor-protégé program. Initiated by Executive Order S-11-06, this program is designed to encourage and support small businesses through voluntary partnerships with mid-size and larger firms. Specifically, the program aims to increase the participation of small Architectural and Engineering (A&E) firms in public transportation projects in the San Diego region.

In order to make this program effective, Caltrans and SANDAG have partnered with the American Council of Engineering Consultants – California (ACEC-CA), and the Caltrans District 11 Small Business Council. A Steering Committee consisting of Caltrans and SANDAG staff plus several members of ACEC, the Caltrans District 11 Small Business Council, and other public agencies have worked together to develop the enclosed program materials. Please take a moment to review them.

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## II. Mission Statement

**Increase the pool of small businesses participating in transportation projects.**

### Goals and Objectives

- ◆ Establish a mentoring program that pairs small businesses with large firms.
- ◆ Enhance small business operations to achieve their growth potential.
- ◆ Create more small business opportunities and provide more meaningful participation on transportation projects.
- ◆ Establish an entry point for small firms who desire to do business with Caltrans, SANDAG, and other public agencies.
- ◆ Develop business relationships that foster new opportunities for both large and small firms.

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## III. Program Guidelines

### Section 1 Location

As an advocate for the program, Caltrans will maintain all documents pertaining to the program. Caltrans will provide online access to the program information. Caltrans District 11 Office will also serve as the facility where participants meet and perpetuate the program.

**Section 2 Participants**

Participants of the program are Mentors, Protégés, or program sponsors. Firms of all sizes are encouraged to participate. Firms that submit an application to participate in the program must have an office in the Caltrans District 11 geography of San Diego and Imperial Counties and have been in business at least one year from the official start date of the program cycle. Other Calmentor programs are available in other Caltrans districts. Each participant is defined as follows:

**A. Mentors**

Larger firms willing to commit time to help smaller firms achieve their growth potential.

**B. Protégés**

Small firms seeking A&E contracts with Caltrans, SANDAG, or other public agencies.

**C. Program Sponsors**

**Caltrans**

[HTTP://WWW.DOT.CA.GOV/D11](http://www.dot.ca.gov/d11)

Program sponsor seeking to facilitate a forum for small firms seeking opportunities to grow.

**SANDAG**

[HTTP://WWW.SANDAG.ORG](http://www.sandag.org)

Co-sponsor of Calmentor program.

**Other Public Agencies**

Any public organization who also desires to sponsor the program.

**ACEC-CA**

[HTTP://WWW.ACEC-CA.ORG](http://www.acec-ca.org)

The lead private organization sponsoring the program and working together with Caltrans and SANDAG is the American Council of Engineering Consultants – California (ACEC-CA).

Participation in the program is strictly voluntary.

**Section 3 Program Structure**

**A. Pairing Process**

- ◆ Mentor and Protégé submit an application.
- ◆ Potential Mentor and Protégé interview each other.
- ◆ Agree on areas of support and development.

**Calmentor**  
Application for Mentor-Protégé Program  
(for Potential Protégé only)

Business Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Contract Period: \_\_\_\_\_  
Type of Business: (City / Business Area) \_\_\_\_\_  
Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Professional References: 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

- Please list three specific goals that your firm would like to gain from participating in the program.
- Please list three areas that your firm brings to the relationship.
- Please list the firm's San Diego/Imperial County office location and approximate number of staff (an office location in San Diego/Imperial County is required for participation in the program).
- Do you have an interest in a partner firm or technical specialty? \_\_\_\_\_
- Is your firm currently certified\* as a DBE, 8(a), 8(b), or 8(c)? Yes  No
- If not, are you planning to become certified? Yes  No
- Has your firm worked with any of the following agencies?
 

a. Caltrans	Yes <input type="checkbox"/> No <input type="checkbox"/>	c. Local Agencies	Yes <input type="checkbox"/> No <input type="checkbox"/>
b. SANDAG	Yes <input type="checkbox"/> No <input type="checkbox"/>	d. Other governmental agencies	Yes <input type="checkbox"/> No <input type="checkbox"/>
- How long has your firm been in business (minimum 1 year)? \_\_\_\_\_
- What is your average annual revenue for the past three years? \_\_\_\_\_  
2008 \_\_\_\_\_  
2009 \_\_\_\_\_  
2010 \_\_\_\_\_
- Does your firm meet the criteria to qualify for California Small Business certification? Yes  No

\*Not required for participation in the program. — Upon completion, please file this document with — American Council of Engineering Consultants, California District 11 at 4970 Taylor Street, San Diego, CA 92121, email: [caltrans\\_sandag@acec-ca.org](mailto:caltrans_sandag@acec-ca.org)

**Calmentor**  
Application for Mentor-Protégé Program  
(for Potential Mentor only)

Business Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Contract Period: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_  
Type of Business: \_\_\_\_\_

Non-Caltrans Professional References:

Name	Firm Name	Phone	Prime	Sub	Client	Owner
			Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

- Please list three specific goals that your firm would like to gain from participating in the program.
- Please list three areas that your firm brings to the relationship.
- Please list the firm's San Diego/Imperial County office location and approximate number of staff (an office location in San Diego/Imperial County is required for participation in the program).
- Has your firm worked with any of the following agencies?
 

a. Caltrans	Yes <input type="checkbox"/> No <input type="checkbox"/>
b. SANDAG	Yes <input type="checkbox"/> No <input type="checkbox"/>
c. Local Agencies	Yes <input type="checkbox"/> No <input type="checkbox"/>
d. Other governmental agencies	Yes <input type="checkbox"/> No <input type="checkbox"/>
- How long has your firm been in business? \_\_\_\_\_

— Upon completion, please file this document with — American Council of Engineering Consultants, California District 11 at 4970 Taylor Street, San Diego, CA 92121, email: [caltrans\\_sandag@acec-ca.org](mailto:caltrans_sandag@acec-ca.org)

**B. Establishing a Formal Relationship**

- ◆ Draft a Memorandum of Understanding (MOU).
  - Describe the goals and objectives (Examples are "Improve the protégé's business development skills by pursuing at least one project together" or "Improve the protégé's business practices by sharing financial policies and procedures").
  - Develop method or approach to achieving the goals and objectives.
  - Establish a mentoring duration.

**C. Evaluation and Feedback**

- ◆ Mentor and Protégé review milestones in their MOU.
- ◆ File progress report with Caltrans and SANDAG every quarter.

**D. Recognition**

- ◆ Evaluate accomplishments.
- ◆ Review metrics that measure growth and development of Protégé and recognize contributions of mentors.
- ◆ Celebrate success at program cycle awards event.

**Section 4 Administration**

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**A. Maintenance**

Program maintenance requires the following:

- ◆ Monitoring the status of mentors and protégés that are already committed, as well as their anticipated completion date.
- ◆ Assisting small firms with the pairing process.
- ◆ Updating the program website:
  - Standard application. <http://dot.ca.gov/dist11/calmentor/>
  - Standard MOU.
  - Frequently asked questions.
  - Disclaimer.

**B. Dispute Resolution**

Participation in the Calmentor program is voluntary. Disputes between two parties may be referred to the Steering Committee for discussion and recommendation.