



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

**Business Name:** \_\_\_\_\_

**Local Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Lead Principal for the San Diego region:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Type of Business:** \_\_\_\_\_  
 (Top 3 Business Areas in San Diego)

|                     | Name: | Phone: |
|---------------------|-------|--------|
| <b>Professional</b> |       |        |
| <b>References:</b>  |       |        |
| 1                   |       |        |
| 2                   |       |        |
| 3                   |       |        |

- Please list three specific goals from the Sample MOU Topics (attached) that your firm would like to achieve from participating in the program.
- Please list three items that your firm brings to the relationship.
- Please list the firm's Southern California offices and approximate number of staff.
- Do you have an interest in a partner firm or technical specialty?
- Is your firm currently DBE, DVBE, or SBE certified\*? Yes  No   
 If yes, provide the relevant certification ID #. \_\_\_\_\_ Certification # \_\_\_\_\_
- Has your firm worked with any of the following agencies?
 

|                  |  |                                   |  |
|------------------|--|-----------------------------------|--|
| a. Caltrans, D11 | Yes <input type="checkbox"/> No <input type="checkbox"/> | c. Local Agencies in SD, Imp cnty | 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? \_\_\_\_\_yrs
- What is your average annual gross revenue for the past three years?
 

|      |       |
|------|-------|
| 2007 | _____ |
| 2008 | _____ |
| 2009 | _____ |

\* Not required to participate in the program.

--- Upon completion, please file this document with ---  
 America Hernandez, Caltrans District 11 at 4050 Taylor Street, San Diego, CA 92110, email: D11\_Calmentor@dot.ca.gov



## Attachment A

### Sample MOU Topics for the Calmentor Program

- Business practices/Development
  - Marketing
    - Website development
    - Networking best practices
    - Which professional societies and government programs to join
    - Promotional materials
    - Marketing plan outline
  - Market placement strategies
    - WHO are your customers? Which agencies?
      - What are their needs?
    - What services do you provide
    - Who are the major players in the industry?
    - Potential alliances/competitors
  - Billing rates/Overhead determination
  - How to allocate the Company's time and resources to which priorities
    - President's
    - Organization
    - Other staff
  - Strategic planning/Expansion plan
    - Where to expand and reduce focus
    - Current focus
    - Future focus
  - Internal quality control advice
  - What changes should be made to survive in a tough economy
- Technical assistance (usually for firms in similar industries)
- Human resource management
- Financial management
- Public works sector
  - Government sources for procurement assistance
  - Procurement websites
  - Small Business Program and contacts
  - The customer's regulations/procedures
  - Go/No Go Process
    - When/How to decide if it is a good idea to bid on proposals
  - When/How to know your limits
  - Teaming strategies
  - The entire proposal process
    - Proposal development
      - Ask the mentor to look through a proposal and comment on it

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- Project budgeting
  - Programs/Spreadsheets
- Project monitoring
  - Keeping projects on track
- Interview
  - Best practices, “Do’s and Don’ts”
  - The presentation: PowerPoint and/or the question and answers portion
- A sample Request for Qualifications (RFQ) response
- Evaluation criteria
- DBE, DVBE, SB
  - Definition, requirements, when it appears on contracts
- Where can small businesses find smaller projects that they can work on
  - Utilization strategies
  - Are there any incentives from government agencies for primes to use such businesses

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