

Line Cards and How to Get on a Team

2013 Calmentor Central Region

April 16, 2013



Agenda

- *Introductions*
- *Line Card*
- *How to Get on a Team*
- *Action Items*

2013 Calmentor Central Region

April 16, 2013



Introductions

- *Name/Company Name*
- *Mentor/Protégé*
- *Certifications*
- *Key Words*

2013 Calmentor Central Region

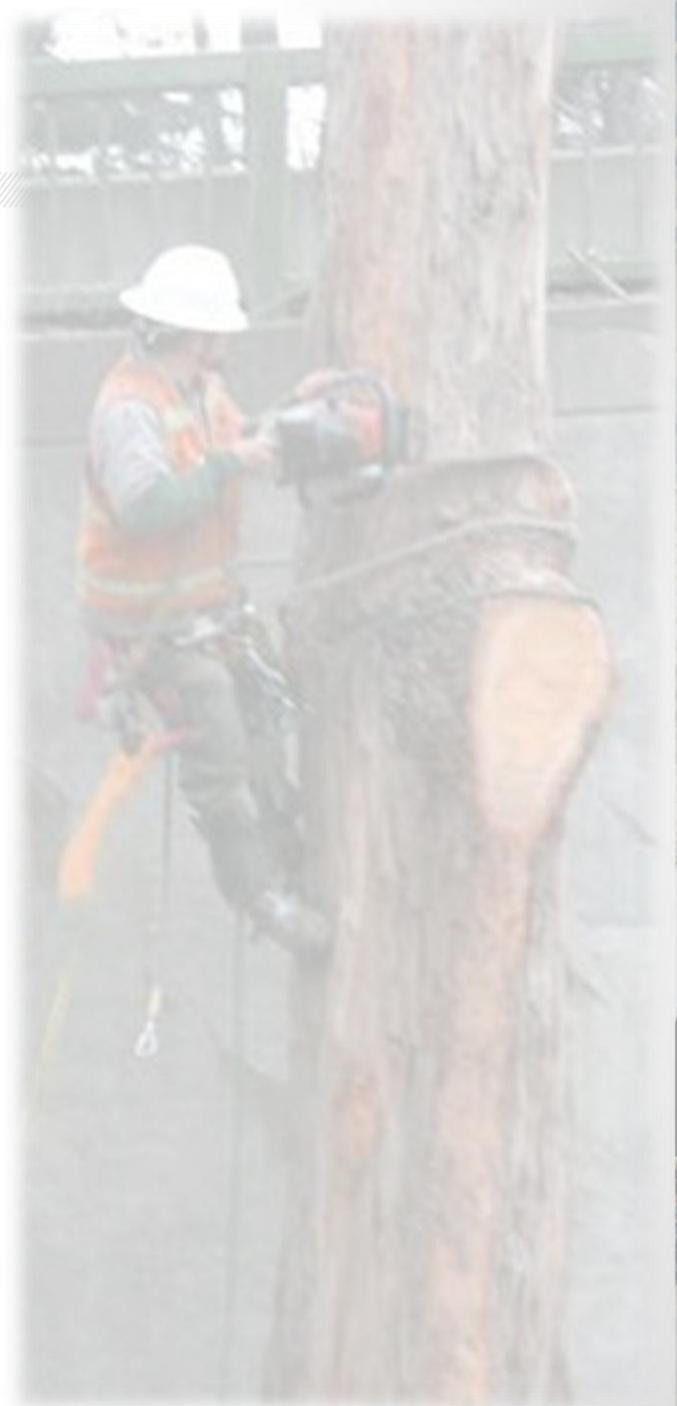
April 16, 2013



Line Cards

Increasing Your Competitive Edge

- Communicate
 - *Capability*
 - *Capacity*
 - *Availability*
- Tailored to the Opportunity/Recipient
 - *Relevancy*
 - *Similarity*



Line Cards

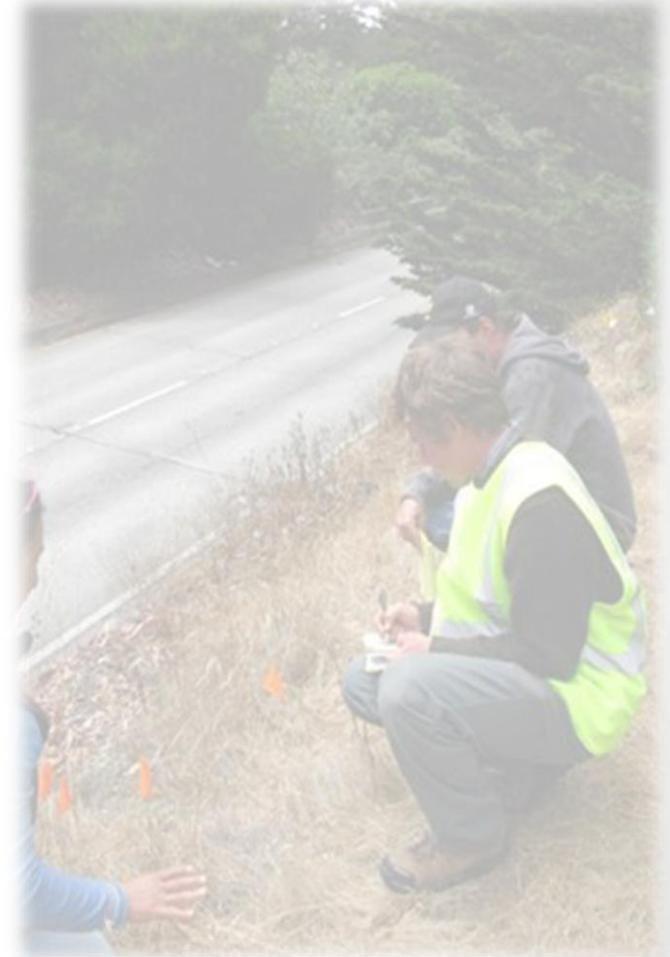
What is in a Line Card

- 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*



Line Cards

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



CONTACT Pamela Keilson
PHONE 510.530.3029 **FAX** 510.530.3628
EMAIL pamelake@acumen-abe.com **WEBSITE** www.acumen-abe.com
ADDRESS 1853 MacArthur Boulevard | Oakland CA 94602-1715

PROFILE

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.

SERVICES

- 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
9. Washington Metropolitan Area Transit Authority, (WMATA) Washington, DC: SmarTrip® Program Consultant
10. Naval Facilities Engineering Command (NAVFAC) Pacific, Joint Guam Program Office, Hawaii: Master Scheduling

BUSINESS INFO

Years in Business: 17
Total Employees: 45

INSURANCE Errors & Omissions

CERTIFICATIONS • SBE • DVBE • DBE • LBE (Oakland)



ALAMEDA COUNTY HIGHLAND HOSPITAL ACUTE TOWER

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



Line Cards – Example 2



Cal-Con Pumping, Inc.

Contact: Julie Berry
 Address: 1 Avenue of the Palms, Suite 212, San Francisco, CA 94130
 Phone: 415-401-9838 Fax: 415-401-7664
 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 Protégé 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

Cert. Date	Agency	Certified As	Certified For	Cert. Number	Codes/No.	Discounts
May 7, 2008	Caltrans/CUCP	DBE, UDBE	Caltrans/CUCP		NCIS: 238110 Firm ID: 36919	
November 17, 2009	BART	WBE, MWBE		3014	NCIS: 238110	
December 5, 2007	San Francisco HRC	Micro LBE	SFPUC, City/County of San Francisco	HRC121315240	Vendor: 75066	10.00%
November 27, 2012	State of California	SBE Micro			Supplier: 51072	5.00%

LICENSES & INSURANCE:

- C-8 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
 Balfour Beatty
 R.M. Harris
 Flatiron

Line Cards – Example 3



55 Acre, Mixed-used development. Zhongshan, China.



Rooftop living garden, Oakland Museum. Oakland, CA.



Pacific Film Archive Theatre, UC Berkeley, CA.



SEPTA Girard Station, Philadelphia, PA.



Our downloadable portfolio is available
online at:
www.que-arch.com



architecture engineering landscape urbanism

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 (HRC081316168 - 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

Line Cards – Example 4

EXARO TECHNOLOGIES CORPORATION



Contact Hector Dominguez
Phone 650-777-4324 Fax 650-777-4326
Email hd@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 set 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 PROFESSIONAL ASSOCIATIONS/AFFILIATIONS

Laborer's International
ASCE
NACE
Pipeline User Group
CA Regional Common
Ground Alliance (CGA)
Committee

PROJECTS

Park Presideo Project
BART Safety Seismic Retrofit Program
VTA Silicon Valley Berryessa Extension Project
BART Warm Springs Project
PG&E 115 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
Pacific Gas & Electric Co.
Balfour Beatty
HNTB Corporation
BART
AECOM
Caltrans
Valentine Corporation
EBMUD
Stanford Linear Accelerator

BUSINESS INFO

Years in Business: 6 Years
Total Employees: 11



Line Cards – Example 5

KWAN WO IRONWORKS INC.



Kwan Wo Ironworks Inc.

Contact Florence Kong
Phone 510-487-9628 Fax 510-487-9698
Email florencek@kwanwo.com
Address 1383 Armstrong Avenue, San Francisco, CA 94124
31628 Hayman Street, Hayward, CA 94544
Website www.kwanwo.com

PROFILE

Kwan Wo Ironworks Inc. has specialized in fabrication and installation of structural steel and miscellaneous steel for nineteen years. We are an MBE, WBE, DBE, SBE, SBA-LBE, and AISC Fabricator and Erector certified firm, and have an excellent track record in providing on schedule service for all our clients.

SERVICES

Structural steel
Miscellaneous metals
Stairs
Stainless steel
Metal decking

BUSINESS INFO

CA Contractor license #: 643621
Years in Business: 20 Years
Total Employees: 70
Ironworkers Local Union 377/378
EMR: 0.86

CERTIFICATIONS, LICENSES & INSURANCE

- SBE ■ UDDB ■ DBE ■ LBE ■ M/WBE ■ SBA-LBE
- AISC Certified Fabricator and Erector
- A ■ B ■ C23 ■ C51
- Bid Bond ■ Performance Bond ■ Payment Bond ■ Workers Comp ■ General Liability ■ Automobile

PROJECTS

CCSF Chinatown North Beach Campus
Heritage High School
LBNL Building 33
Metreon Mall Renovation
Napa Valley Library & Learning Resources Center
OUSD - Downtown Educational Complex
Saint Mary's Catholic School & Center
Santa Rosa Junior College Culinary Arts Center
UCSC Porter "A" Residence
Walnut Creek Library
Washington Hospital

CLIENTS

Bovis Lend Lease, Inc.
Lathrop Construction
Webcor Builders
Westfield LLC, Regional Construction Office
Edge Development Inc.
Turner Construction
Herrero Contractors, Inc.
Brown Construction, Inc.
DPR Construction, Inc.
West Bay Builders, Inc.
Swinerton Builders



Line Cards – Example 6

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

Company Info	NAICS Codes
DUNS 963601211	238910 481211 481219 541110 541360
CAGE Code 63PG3	541370 541611 541614 541618 541690
	541922 541990

CERTIFICATIONS

US FEDERAL	<ul style="list-style-type: none"> ♦ Woman-Owned Business ♦ Small Business Enterprise ♦ Economically Disadvantaged Woman-Owned SB (EDWOSB)
STATE OF CALIFORNIA	<ul style="list-style-type: none"> ♦ Supplier #1472800 ♦ Certified Small Business ♦ CA Unified Certification Program Disadvantaged Business Enterprise (CUCP DBE) (in process)
NATIONAL	<ul style="list-style-type: none"> ♦ 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

Phone: +1 408.489.4464 7195 Brooktree Court
 Fax: +1 888.489.3614 San Jose, CA 95120
annette@nakama-e.com www.nakama-e.com

How to Get on a Team

Six Step Process

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

How to Get on a Team

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?

How to Get on a Team

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

How to Get on a Team

Step 2 – Intelligence Gathering

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

Follow The Money!

How to Get on a Team

Step 3 – Identify Opportunities

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

How to Get on a Team

Step 4 – Networking and Teaming

- 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

How to Get on a Team

Step 5 – Branding

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

How to Get on a Team

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

Contact Information

Paul Pendergast
Pendergast Consulting Group

1 Avenue of the Palms Avenue, Suit 304
San Francisco, CA 94130
415-621-0600

paul@pendergastconsultinggroup.com