



COURSE SYLLABUS SUBCONTRACTOR ESSENTIALS, PART 2






Course Title:	Subcontractor Essentials, Part 2 Keys to Successful Caltrans Contracting, Part 2
Date:	Thursday, June 11, 2009
Time:	9:00 a.m. – 1:00 p.m. (4 hours); A 15-minute break will be offered. Light lunch provided
Location:	SAS Trailer Conference Room 333 Burma Road - Pier 7 Oakland, CA 94607
Course Description:	This course provides hands-on exposure to Construction Site Safety, Construction Worksite Set-up, Safety Plan, Project Scheduling, Construction Inspection, Quality Control/Quality Assurance, Extra Work Bills and Change Order Processing including an additional review of Materials Cost Reimbursement. This course also includes breakout exercises to review the do's and don'ts in completing the required forms to ensure success with project engineering and administration.
Course Goal(s):	The goal of this course is to provide your firm with a solid foundation of construction support and delivery capabilities and will position you to be successful on your first contract and to secure increased scope and engage in additional construction activities. Attendees will better understand the following: <ul style="list-style-type: none"> • Construction Methods and Materials • Principles of project management • Payment processing • Extra Bill Work/Change Order Processing • Accounting • Certified Payroll • The importance of a safety program • Elements of a safety program and Safety program development • How to implement a safety program and the benefits of a safety program • Consequences of not having a safety program • OSHA and reporting requirements • Contractor Responsibility
Methodology:	The course will be instructor–led with group discussions. The instructor-led portion of class will last 4 hours; with interactive group discussions, and hand-on breakout sessions, and Question and Answer. Group discussions will provide an opportunity to discuss real-life experiences and perspectives. This course includes hands on breakouts/mini-sessions providing an opportunity for participants to actually work with certified payroll





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	forms, invoice/billing forms and various Caltrans required forms and reports.
<p>Facilitator:</p> 	<p><u>Miguel Cabral</u> – Caltrans Toll Bridge Small Business Program – Deputy Project Manager</p> <p>Mr. Miguel Cabral has 8+ years experience providing Small Business (SB) and Disadvantaged Business Enterprise (DBE) Outreach, Counseling and Training Services to the California contracting community, including DBE Supportive Services to Southern California Prime contractors and job training and placement services to individuals as part of the Job Training Partners of America Program (JTPA) and the Workforce Investment Act (WIA).</p> <p>Mr. Cabral’s Public Works experience includes contract compliance monitoring and enforcement of Labor Compliance Prevailing Wage requirements and DBE and SB certification technical assistance, having worked directly for Los Angeles County MTA’s Diversity and Economic Opportunity Department and as a consultant to various public entities in Southern California (including Metrolink, OCTA, City of Santa Clarita, Pasadena Unified School District, the Los Angeles Community College District and the City of San Fernando).</p>
<p>Course Instructors:</p>  	<p><u>Chris Smith</u> – MCM Construction – Project Engineer</p> <p>Mr. Smith is an expert in the field of construction with extensive knowledge in construction management. Mr. Smith has been with the Bay Bridge Project since 2004 and has worked on three contracts under this project. Currently, Mr. Smith is the Principal Engineer at MCM Construction, Incorporated overseeing bridge development and construction on the Oakland Touchdown, Contract 1. In his current role, Mr. Smith is responsible for overseeing the Schedule, Subcontractor Management, Safety, Billing, Purchasing, Welding QCM, Planning, Engineering and Owner Interface.</p> <p><u>John James</u> - Caltrans Toll Bridge Small Business Program – Deputy Project Manager</p> <p>Mr. James, a successful small business owner, has over 25 years of management experience, including over 21 years of contract and project management with Caltrans. Mr. James is considered an expert on developing project management plans that meet Caltrans and FTA requirements for major projects including quarterly reviews, scope of work, schedule of development, and budget and financial plan development; on state and federal funding/programming processes (STIP); and on procedures for developing and implementing capital projects.</p>
<p>Objective:</p>	<p>The objective of this course is to provide attendees with essential information on Bay Bridge subcontracting opportunities that will build on the current knowledgebase and also foster a hands-on review of pertinent information designed to aid the successful completion of major construction projects.</p>





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<p>Training Approach:</p>	<p>This course will be taught using an interactive Instructor–led approach with group discussions and group exercises with group discussions, Question and Answer (Q & A), and an evaluation survey.</p> <p>Group discussions will provide an opportunity to discuss real-life experiences and perspectives. This course includes hands-on break-outs/mini-sessions providing an opportunity for participants to actually work with invoice/billing forms and various Caltrans required forms and reports.</p>
<p>Course Contents:</p>	<p>There are numerous procedures and practices that must be in place in order to effectively manage construction activities and this course aims to refresh your understanding of the process and procedures needed to be successful with Caltrans for both the Small Business owner and their employees. Procedures needed to be in place to guide subcontractor’s performance are:</p> <ul style="list-style-type: none"> • Materials costs and reimbursements, • Construction Worksite Set-up, • Safety Plan, • Accounting including Timesheet Processing & Submitting Invoices for Payment, • Extra Work Bills & Change Order Processing, • Quality Control/Quality Assurance, • Project Scheduling, • Construction Inspection, and • Caltrans Standard Reporting Forms <p><u>SECTION 1 - WELCOME AND INTRODUCTIONS</u></p> <ul style="list-style-type: none"> • Background on SFOBB TB/SBP • Purpose of the Class <p><u>SECTION 2 - HOW TO DO BUSINESS WITH CALTRANS</u></p> <p><i>1. Construction Basics</i></p> <ul style="list-style-type: none"> • Doing Business with Caltrans • Caltrans Construction Manual • Standard Specifications • Access to Plans and Specs • Construction Organization • Role of the Resident Engineer (R.E.) • Character of Workers • Preconstruction Conferences • Projects -How Projects are Measured for Success <p><i>2. Construction Methods and Materials</i></p> <ul style="list-style-type: none"> • Construction Safety • Construction Management Processes • National Pollution Discharge Elimination System (NPDES)/Storm Water Pollution Prevention Plan (SWPPP)





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- Construction Administration
- Construction Worksite Interactions
- Control of Materials
- Facilities and Equipment

3. Quality Assurance (QA)/Quality Control (QC)

- Sample QC Plan
- Professionalism/ Ethics
- Construction Resources
- Review Caltrans Standard Construction Forms

SECTION 3 - PROJECT & CONSTRUCTION MANAGEMENT (DETAILED)

- What is project management?
- What is a success triangle?
- Key Knowledge Areas
- Construction and Project Manager's Role
- Accounting and Payroll
- Project Controls, Schedule and Software
- Quality Assurance (QA)/ Quality Control (QC)
- Sample QC Plan
- Jobsite Safety
- Scope, Schedule and Budget
- Project Relations

SECTION 4 - PROJECT ADMINISTRATION

1. Worksite Binder and Records

- Timesheets
- Payment invoicing and Schedule of Value (SOV)
- Hands-On: Contractor invoicing forms

2. Extra Work Bills/ Change Order Processing

- How to handle extra work and change orders
- Company change order forms
- Who can approve change orders
- Invoicing for extra work/change order work

3. Labor Compliance (BRIEF)

- California Prevailing Wage Labor Compliance Codes (Department of Industrial Relations)
 - Overtime Regulations
- Federal Labor Compliance (Prevailing Wage) Davis-Bacon Act

4. Materials Costs and Reimbursement (BRIEF)

- Materials On Hand (MOH)

SECTION 5 - PROJECT SAFETY PROGRAM

Project Safety

- The importance of a safety program
- Elements of a safety program
- Benefits of a safety program





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- Consequences of not having a safety program
 - Safety program monitoring
 - Emergency response
- How to implement a safety program
- OSHA & reporting requirements
- Top OSHA Violations
- The need for a safety manual
- Safety Manual Development
- Importance of a safety manual in implementing a company wide safety attitude

Break-Out Session - Develop a template of a Safety Manual

Construction Safety

- Establishing project Specific Activities
- Roles and responsibilities
- Why have a Plan?
- Typical programs
- Top OSHA Violations
- Continual Improvement
- Regulations imposed by Federal and State Requirements
- Training to carry out contract requirements
- Provider Contact Information
- Map of CA DOT Districts/Regions
- Providers by Category for Regions
- Sample Forms to be used for the Program

SECTION 6 - DISCUSSION

Questions and Answers

Evaluation Survey

Services Offered by the Toll Bridge Small Business Program

Upcoming Classes - Bidding and Cost Control and more...

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