



COURSE SYLLABUS SUBCONTRACTOR ESSENTIALS, PART 1






Course Title:	Subcontractor Essentials, Part 1 <i>Keys to Successful Caltrans Contracting</i>
Date:	Thursday, May 28, 2009
Time:	9:00 a.m. – 1:00 p.m. (4 hours); A 15-minute break will be offered. <i>Light lunch provided</i>
Location:	SAS Trailer Conference Room 333 Burma Road - Pier 7 Oakland, CA 94607
Course Description:	This course provides an in-depth review of all essential documents and tools needed to successfully complete a project and receive reimbursement in a timely manner. This course is being co-taught by Caltrans representatives and an active toll bridge construction contractor. Areas to be covered include Caltrans Standard Reporting Forms, Subcontractor Agreements, Notice-to-Proceed, Insurance forms, Schedule of Values, Payment invoices, including payment for materials on hand, RFIs, including Submittals and Transmittals (what they are, when to use them), Labor Compliance and Contractor Certified Payroll Reporting.
Course Goals:	<p>The goal of this course is to provide additional foundation on project management for contractors currently working on SFOBB. These include project management guidance, project scope and budget guidance, and some legally or contractually required documents. This information will guide the small business and it's construction site manager to provide effective control and management of the company's construction responsibilities. This class will discuss those vital documents including invoicing and payment provisions.</p> <p>Some of those documents include:</p> <ul style="list-style-type: none"> • Subcontractor agreements; Notice-to-Proceed; • Reviewing the bid and setting schedule of values • Change orders; • Understanding how the owner pays <ul style="list-style-type: none"> ○ What is needed ○ What is complete work • Payment invoices and schedule off values control <ul style="list-style-type: none"> ○ Resolving conflicts: <ul style="list-style-type: none"> ▪ Payments ▪ Scope ▪ Schedule • RFIs, Submittals & transmittals • CPRs/Prevailing wage requirements





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<p>Methodology</p>	<p>This course includes hands on breakout mini-sessions and group exercises providing an opportunity for participants to actually work with invoice/billing forms and various Caltrans required forms and reports.</p> <p>This course will 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.</p>
<p>Course Facilitator:</p> 	<p><u>Patricia K. Padilla</u> – Caltrans Toll Bridge Small Business Program – Project Manager</p> <p>Patricia K. Padilla, President and Owner of Padilla & Associates, Incorporated, Prime Consultant of the Toll Bridge Small Business Outreach Program, is a recognized leader and designated expert in her field, with over 20 years in developing and administering Federal and State DBE and SBE model programs, construction and professional service contractor training, and local hire and strategic outreach initiatives for Large-Scale Construction Transportation and Highway improvement projects.</p> <p>Padilla & Associates, Incorporated is also a certified SB and a certified third party labor administrator by the Director of Industrial Relations (DIR).</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>





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Objective(s)

The objective of this course is to provide attendees with essential information on SFOBB subcontracting opportunities that will foster a hands-on review of pertinent information designed to aid the successful completion of major construction projects. The information that will be reviewed during the course is:

1. Contractor/Subcontractor Relations
 - Subcontracting Agreement
2. Understanding How the Owner/Prime Pays
3. Effective estimating and the importance of SOV
4. Reviewing Bids and Setting Schedule of Values (SOV)
 - Subsequent impact on Subcontractors and Suppliers payments
 - How to integrate changes into an SOV:
 - What is needed
 - What is considered complete work
 - Potential project schedule impacts
 - Earned value
5. Understanding the specifications
 - Materials on Hand (MOH)
 - Payments for MOH
 - Potential project schedule impact
6. Principles of Project Management
7. Getting Paid and SOV
8. Payment invoices and SOV control
 - Resolving conflicts
 - Payments
 - Scope
 - Schedule
9. Processing change orders
10. Certified payroll and records
11. Prevailing Wages Requirements
12. RFIs, including Submittals and Transmittals
 - Timelines – must be aware
 - Approval – impacts on project work





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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>Successful completion of a major construction project requires a structured project management organization. There are numerous procedures and practices that must be in place in order to effectively manage construction activities. Your construction site manager will need to have certain procedures in place in order to effective control and manage your company’s construction responsibilities. Procedures needed to be in place to guide subcontractor’s performance are:</p> <ul style="list-style-type: none"> • Preconstruction Conferences • Subcontracting Agreements and authorization to proceed • Understanding how the owner pays • Understanding specifications • CPR and prevailing wages <p><u>SECTION 1 - WELCOME AND INTRODUCTIONS</u></p> <ul style="list-style-type: none"> • Welcome • Introduction of Instructors and Attendees • Background on SFOBB/Toll Bridge and the Small Business Program • Purpose of Class • Review of Objective for Current Bay Bridge Subcontractors • Review of Syllabus Topics <p><u>SECTION 2 – AGREEMENTS</u></p> <ul style="list-style-type: none"> • Preconstruction conferences, Subcontractor Agreements and Notice to Precede • Know whether you have the competency or resources to help the prime contractor • Don’t offer what you can’t deliver on time, on budget and per the specifications • Better to walk away than to damage your reputation • Understand Prime’s expectations <p><u>SECTION 3 - SCHEDULE OF VALUES/INVOICING/CHANGE ORDERS</u></p> <ul style="list-style-type: none"> • Understanding the bid and determining the schedule of values • The importance of the schedule of values • Impact of schedule of values on progress payments • Impact of project schedule and schedule of values on progress payments (earned value estimates)





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SECTION 4 - RFIs, INCLUDING SUBMITTALS AND TRANSMITTALS

- Requests For Information
- Documentation
- Timelines – response & processing
- Submittals/Transmittals
- Timelines
- Promptness
- Impact on project work

SECTION 5 – MATERIALS-ON-HAND, CERTIFIED PAYROLL AND PREVAILING WAGES

- Materials-on-hand and how to get paid for supplies and materials delivered to the jobsite
- Reimbursement determination in specifications
- Approvals Required
- CPR and Certified Payroll
- Requirements on public works projects
- Statutory and regulatory requirements
- Format to use
- Complete package

SECTION 6 - PROJECT MANAGEMENT- (CONSTRUCTION BASICS)

- What is Project Management?
- Your on-site project manager.
- Caltrans Construction Manual
- Construction Organization
- Role of the Resident Engineer (R.E.)
- Character of Workers
- Project Safety
- Projects -How Measured for Success

SECTION 7 - DISCUSSION AND WRAP-UP

- Questions and Answers
- Evaluation Survey
- Services offered by the Toll Bridge Small Business Program
 - Upcoming Classes
 - Subcontractor Essentials, Part 2 -Thurs., June 11, 2009
 - Bidding and Cost Control – TBD

REGISTER TODAY!

