

P r o f e s s i o n a l L e a r n i n g
E X C H A N G E



DBE Learning Exchange

*Continuing Education to
Optimize Minority Business
Development*

2007 Course Handbook



2007 Course Outline

Course	Instructor	Date	Time
BUSI. ENTERPRISE CERTIFICATION	Dept. of Busi. Dev.	February 7, 2007	9:00A – 12:00P
CHANGE ORDER PROCESS	Jeff Neumayer, P.E.	TBD	2:00P – 5:00P
BUSI. ENTERPRISE CERTIFICATION	Dept. of Busi. Dev.	May 8, 2007	9:00A – 12:00P
PROJECT MANAGEMENT	TBD	June 27, 2007	2:00P – 5:00P
BUSI. ENTERPRISE CERTIFICATION	Dept. of Busi. Dev.	August 8, 2007	9:00A – 12:00P
BONDING & INSURANCE	Ingrid Merriwether & James Drake	October 4, 2007	2:00P – 5:00P
BUSI. ENTERPRISE CERTIFICATION	Dept. of Busi. Dev.	November 7, 2007	9:00A -- 12:00P

The workshops are designed for the prime consultant to transfer technical knowledge, including lessons learned to small, DBE firms. For more information on the DBE Learning Exchange, contact Karen Hollis at khollis@miamidadade.gov

DBE Learning Exchange has been established as part of Miami-Dade Transit's proactive plan to ensure that DBE and local firms will have an equitable opportunity to compete for contracts and subcontracts. This program is for DBE firms that are interested in:

- Growing their business beyond the "sole proprietorship;"
- Developing capabilities to optimize minority business development;
- Obtaining Full Access of the Financial Markets; and
- Diversifying or expanding to seize opportunities in growth industries.

BUSINESS ENTERPRISE CERTIFICATION

Sessions	Dates	Times	Cost
Business Enterprise Certification	5-09-07 8-08-07 11-7-07	9:00 – 12:00 p.m.	FREE

Table: Schedule Subject to Change.

General Overview:

The certification process is the starting point for participation in Miami-Dade County's small and minority business programs. The Department of Business Development (DBD) Certification Unit processes all applications for certification and provides technical assistance.

Who Should Attend?

Disadvantaged Business Enterprises (DBEs), Small Business Enterprises (SBEs), Community Small Business Enterprises (CSBEs), and Community Business Enterprises (CBEs) firms who, now or in the future, would like to provide goods and/or services to Miami-Dade County and are not currently certified.

Seminar Highlights

- Instructions for completing the Business Enterprise Certification Application, CSBE Application Supplement.
- Instructions for completing the Disadvantaged Business Enterprise Program Uniform Certification Application.
- Instructions for completing the Affidavit of Certification
- Instructions for completing the Personal Net Worth Statement
- Instructions for completing the Business Entity Registration Application.
- Instructions for completing the IRS Forms W-9 and W-8ECI.
- Assistance with the accumulation of supporting documents to submit along with the application.

What you will gain

- Assistance with satisfying all of the requirements for small and disadvantaged enterprise certification.
- Additional information on and guidance through the certification review process.
- A pre-eligibility review meeting to provide guidance and assist you in preparing for the actual meeting.
- One-on-one consultation for any questions regarding the entire certification process.

How To Register: A registration form can be found at the end of this Course Handbook. Simply complete the form and fax it to Karen Hollis at (305) 375-2997.

CHANGE ORDER PROCESS TRAINING

Sessions	Date	Time	Cost
Change Orders	TBD	2:00 – 5:00 p.m.	FREE

Table: Schedule Subject to Change.

General Overview:

This seminar is designed to focus on the issues that must be properly addressed when negotiating and evaluating change orders and to provide attendees with the information needed to help an organization avoid the added time and expense of having to resolve and renegotiate unexpected claims when the project is completed. A change order can be defined as a contract modification.

Topic Discussions:

- General Overview of Contract Law
- Why Use a Change Order?
- Authority And Responsibility For Change Order Work
- Change Orders, Construction Change Directives And Minor Changes In The Work
- Contract Modification Due To Differing Site Conditions
- Contract Modification Due To Defective or Ambiguous Plans Or Specifications
- Contract Modification Due To Project Delays
- Claims Based Upon Contract Modification; Analysis of Typical Scenarios Involving Change Orders.

Who Should Attend?

Project managers, contractors, subcontractors, developers, principals, owners, suppliers, architects, engineers, contract administrators, insurance professionals, public works directors, lenders

Course Description:

As a professional involved in construction projects, you know how important it is for change orders to accurately reflect the intent of all of the parties involved. Hastily negotiated and vaguely drafted change orders fail to express the intent of parties, and more often than not lead to unwanted and unnecessary disputes at the conclusion of the project.

This highly informative seminar will focus on key issues that must be properly addressed when negotiating and evaluating change orders, and provide you with the information you need to help your organization avoid the added time and expense of having to resolve and renegotiate unexpected claims when the project is completed. Discussion will also focus on how to efficiently and effectively audit change orders.

Who Will Benefit?

This seminar is designed for project managers, contractors, subcontractors, developers, principals, owners, suppliers, architects, engineers, contract administrators, public works directors, lenders, accountants, consultants, procurement directors and attorneys.

Seminar Highlights:

- Introduction To Change Orders
- Key Issues To Be Addressed
- Pricing The Change
- Scheduling Of Change Orders

How To Register:

A registration form can be found at the end of this Course Handbook. Simply complete the form and fax it to Karen Hollis at (305) 375-2997.

ESSENTIALS FOR SUCCESSFUL PROJECT MANAGEMENT

Sessions	Dates	Times	Cost
Project Management	June 27, 2007	2:00 – 5:00 p.m.	FREE

Table: Schedule Subject to Change.

General Overview:

This workshop addresses both the interpersonal and technical sides of project management by focusing on how to: determine what needs to be done and create a plan; obtain organizational support and resources; utilize tools that assign priorities, interdependencies, time, and responsibility; use negotiating and influencing skills effectively; and manage both task and team needs.

Who Should Attend?

Managers, professionals without formal training in project management, those who want to improve their skills in planning, organizing and controlling organizational activities

Course Description:

To stay out front in today's rapidly changing business environment, organizations are increasing their project initiatives when the time and resources available for their completion may be constrained. The challenge for a project manager is to guide an initiative's tasks to successful completion within the given constraints by applying the right processes and tools and having the interpersonal skills to manage the project team. This workshop addresses both the interpersonal and technical sides of project management by focusing on how to:

- Determine what needs to be done and create a plan
- Obtain organizational support and resources
- Discover tools that assign priorities, interdependencies, time, and responsibilities
- Develop an array of professional interfacing skills to enhance team performance
- Coach and motivate team members

Who Will Benefit

Managers responsible for guiding project initiatives from their inception to completion. Professionals without formal training in project management, as well as those who want to improve their skill in planning, organizing, and controlling organizational activities.

Seminar Highlights

- Project definitions and the role of the project manager
- Assumptions, risks, and project scope
- Sequencing project activities to create a plan
- Essential tools and techniques for managing tasks
- Creating a resource assignment plan
- Communicating project-related information effectively
- Developing and using a monitoring-and-control process
- Conducting successful team meetings
- Motivating a team and team members effectively
- Implementing interpersonal strategies to achieve improved performance
- Reporting accomplishments and expenditures
- Software to assist in the project management process

How To Register:

A registration form can be found at the end of this Course Handbook. Simply complete the form and fax it to Karen Hollis at (305) 375-2997.

BONDING AND INSURANCE

Sessions	Date	Time	Cost
Bonding and Insurance	October 4, 2007	2:00 – 5:00 p.m.	FREE

Table: Schedule Subject to Change.

General Overview:

This program will provide insight and practical advice from construction lawyers to understand and address the complex issues entailed in procuring insurance and bond coverage, asserting claims against insurers and sureties and pursuing mechanic's lien claims. Seminar highlights: Other insurance issues; Performance bonds; Payment bonds.

Who Should Attend?

This one-day seminar is designed for attorneys, project managers, presidents, vice presidents, contractors, subcontractors, principals, owners, contract managers, developers, architects, engineers, accountants, insurance professionals, risk managers and other construction professionals.

Course Description:

BOND GUARANTEE

Provide guidance and assistance to DBE firms in securing bonding and working capital. Specifically to remove some of the obstacles that has historically prevented DBEs from obtaining bonds; such as

- inadequate financials
- insufficient working capital
- marginal financial ratios
- size of project greatly exceeds work history
- type of project is new to contractor
- inadequate labor resources.

The surety bond guarantees to the obligee or owner that the (principal, contractor or subcontractor) will perform on all terms and conditions as specified under his/her contract.

OWNER CONTROLLED INSURANCE PROGRAM (OCIP)

Provide guidance and assistance to DBE firms on the benefits of consolidated insurance coverage on a construction project; such as

- Reduced Insurance Cost – by buying in bulk, greater discounts are afforded.
- Centralized Safety Program – more concentrated and effective approach reduces claims and overall costs.
- Broader Coverage & Higher Limits – better terms and increased coverage can be negotiated.
- Small & Minority Owned Business Participation – DBE's are afforded workers compensation and general liability coverage

Who Will Benefit

The program will provide insight and practical advice from construction lawyers to understand and address the complex issues entailed in procuring insurance and bond coverage, asserting claims against insurers and sureties and pursuing mechanic's lien claims.

Seminar highlights:

- Other insurance issues
- Performance bonds
- Payment bonds

What You Will Learn:

- The attendee will be able to discuss commercial general liability insurance.
- The attendee will be able to identify federal project payment bond considerations.
- The attendee will be able to review Mechanics' Lien Law.

How To Register:

A registration form can be found at the end of this Course Handbook. Simply complete the form and fax it to Karen Hollis at (305) 375-2997.

Learning Exchange Course List

ALTERNATIVE DISPUTE RESOLUTION
ANNUA REVIEW OF OVERHEAD COSTS (Provisional & Final Rate)
BONDING & INSURANCE
CHANGE ORDER PROCESS TRAINING
COMPLIANCE & LIABILITY WITH DBE / NON-DISCRIMINATION PROGRAM REQUIREMENTS
CONTRACTS (Federal / Non-Federal Distinctions)
CONTRACTOR'S CHANGE PROPOSAL
ESTIMATING / BASIC QUANTITY TAKE-OFFS
FARS (Federal Acquisition Requirements – Part 31) - Cost, Principles, Record-Keeping / Invoicing
FILING OF PRELIMINARY LIEN NOTICES / STOP NOTICES
GUARANTY / WARRANTY
LABOR COMPLIANCE PROGRAM
MARKETING / BUSINESS DEVELOPMENT
OMBUDSPERSON
PAYMENT, RECORDS AND CLAIMS
PROGRESS PAYMENTS (Record Keeping and Billing)
PROJECT MANAGEMENT
RECEDENCE OF DOCUMENTS
RECORDS & AUDIT
RETENTION / CLOSE OUT (State & Federal Design Build Regulations)
SAFETY & ENVIRONMENTAL COMPLIANCE
SCHEDULING & COST CONTROLS
SMALL BUSINESS TECHNICAL ASSISTANCE
STATE LABOR CODE & DOT LABOR REQUIREMENTS
SUBCONTRACTING
SUBMITTAL REQUIREMENTS (Understanding the Contract – Certifications)
QUALITY ASSURANCE, QUALITY CONTROLS
WORKERS' COMPENSATION

REGISTRATION FORMS

REGISTRATION FORM	
Business Enterprise Certification Workshop	
Wednesday, May 8, 2007	
Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	

REGISTRATION FORM	
Business Enterprise Certification Workshop	
Wednesday, August 8, 2007	
Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	

REGISTRATION FORM	
Business Enterprise Certification Workshop	
Wednesday, November 7, 2007	
Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	

REGISTRATION FORM

Change Order Process Workshop

Wednesday,

2007

Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	

REGISTRATION FORM

Bonding & Insurance Workshop

Wednesday, October 4, 2007

Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	

REGISTRATION FORM

Project Management

Wednesday, June 27, 2007

Name of Attendee(s)	
Company Name	
Company Address	
Company Telephone	
Company Facsimile	