



**BAY AREA RAPID TRANSIT OFFICE OF CIVIL RIGHTS  
SMALL BUSINESS SUPPORT SERVICES**

# **ANNUAL REPORT**

**FY 2023**





# SMALL BUSINESS SUPPORT SERVICES

## CONTENTS

SBSS Program Overview	3
Year Four Key Performance Indicators	4
Year Four Highlights	5
Success Stories	10
SBSS Program Resources	14

**BAY AREA RAPID TRANSIT OFFICE OF CIVIL RIGHTS  
SMALL BUSINESS SUPPORT SERVICES**

# ANNUAL REPORT

**FY 2023**





# SMALL BUSINESS SUPPORT SERVICES

The Small Business Support Services (SBSS) Program is a free resource the Bay Area Rapid Transit District (BART) has instituted to assist small, minority, women, disabled veteran, and lesbian, gay, bisexual and transgender (LGBT) businesses with identifying construction opportunities and to guide their efforts to successfully bid on these projects. Once a contract is secured, the BART SBSS program provides relevant support services to ensure the successful delivery of that project from inception to completion. The services are provided free, at no cost to the small business.

The SBSS Program consists of two programs:

**PRE-AWARD:** Assist with the identification of, and engagement with, small businesses so that they can be more competitive in the procurement process with respect to BART construction projects.

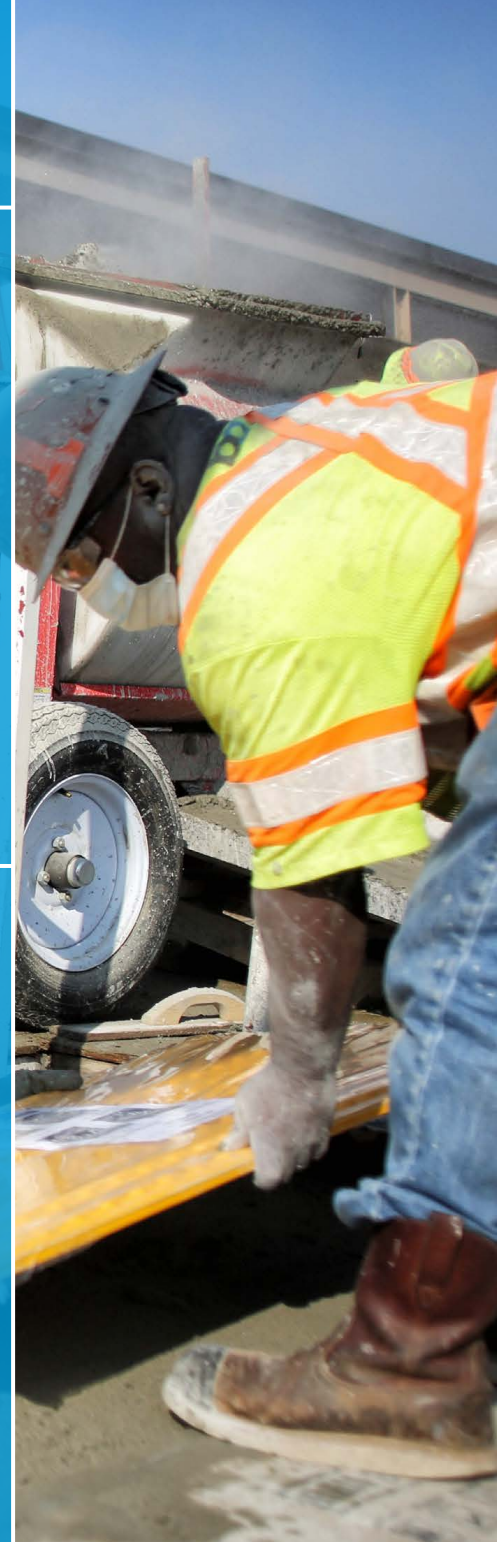
**POST-AWARD:** Provide support to small businesses working on BART Construction Projects to successfully complete their scope on BART construction projects.

## PRE-AWARD

- Marketing and Statement of Qualifications
- SB/DBE/SBE Assistance
- BART Procurement Portal Navigation
- Estimating and Bidding Strategies
- Plans, Scope & Specs Analysis
- Matchmaking & Teaming Introductions
- Communication Asset Analysis & Development
- Presentation Skills Training
- Financial Resiliency and Education
- Workforce Education & Compliance

## POST-AWARD

- Preconstruction Submittals
- Base Line Schedule and Schedule of Values
- Health and Safety Requirements
- Site Specific Work Plans (SSWP's)
- Invoicing/Progress Payment Processing
- Differing Site Conditions
- Request for Information (RFIs)
- Change Notices / Change Orders
- Time Impact Evaluations
- Claims Filing and Supporting Documentation
- Elations / Certified Payroll Reporting
- Notice of Potential Claims and Documentation





# YEAR 4 KEY PERFORMANCE INDICATORS

## SMALL BUSINESS SUPPORT SERVICES

### NUMBER OF FIRMS SOLICITED

PRE-AWARD	POST-AWARD
4,021	450
Solicitation is defined as sending emails inviting firms to avail themselves of SBSS services Focused on DBEs, SBs, WBEs, DVBEs, and SBs certified by DGS.	

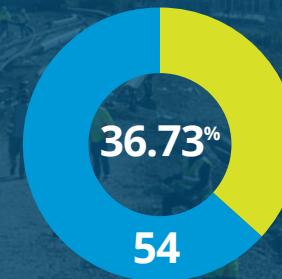
### NUMBER OF FIRMS RECEIVING TECHNICAL ASSISTANCE

PRE-AWARD	POST-AWARD
147	39
Numbers represent distinct businesses receiving technical assistance. Percentages represent number of firms receiving technical assistance over number of firms solicited. Technical assistance is defined as 1 on 1 assistance or workshops.	

### SBSS KEY PERFORMANCE INDICATOR

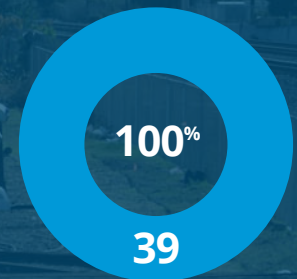
#### PRE-AWARD

NUMBER OF FIRMS THAT RECEIVED PRE-AWARD SBSS TECHNICAL ASSISTANCE THAT WERE LISTED ON A BIDDING TEAM



#### POST-AWARD

NUMBER OF FIRMS THAT RECEIVED POST-AWARD SBSS TECHNICAL ASSISTANCE THAT SUCCESSFULLY COMPLETED OR ARE IN THE PROCESS OF COMPLETING THEIR WORK



Firms listed on multiple teams on one contract count multiple times. Firms listed on multiple contracts count multiple times.



# SMALL BUSINESS SUPPORT SERVICES

**BART Pre-Award Small Business Support Services Survey**

You are receiving this email invitation to take our very short BART Pre-Award Small Business Support Services (SBSS) survey because over the last three years you have been part of our outreach to small, minority, women, veteran and LGBT businesses.

THANK YOU for letting us share key information regarding BART's SBSS program as well as information related to BART's ongoing procurement construction contracting opportunities.

I've been honored to be the Program Administrator for the Pre-Award SBSS Program and we want to learn from you how we can improve, make even more relevant, our free service offerings to benefit your business. Your input is important so that we can make process improvements to the SBSS Program.

The link below will take you to a very short survey (5 minutes or less to complete). We know you are busy, so we have streamlined the survey to several of the key program areas.

Thank you, in advance, for your participation. It is greatly appreciated. Let me know (via the contact information below) if you have any questions. We are here to provide free outreach and technical assistance to your business:

Paul Pengergast  
SBSS Pre-Award Program Administrator

To take this survey, please click on the link below:

**TAKE THE 5-MINUTE SURVEY!**

Operations@MitchellsTrans.com  
48-237 RANU (8 7347)

HOME ABOUT SERVICES CLIENTS DRIVERS BLOG REQUEST QUOTE

**M**  
MITCHELLS  
TRANSPORT

YOUR RELIABLE CARRIER

## From Pick-up To Destination

COMPUTER INFORMATION STATION  
Cybersecurity Assessment and Hardening

Home Who We Help How We Impact Why CIS? Partners Contact More

### What's in Your Cybersecurity and Attack Response Plan? How Fast Can You Stop the Bad Guys? Not Sure? CIS Can Help You with That!

TAKE OUR RAPID ASSESSMENT AND SCHEDULE A CHAT WITH OUR EXPERTS

Contact Us

I'm looking for "Managed IT Solutions" and Support for:

Contact: Alisa Mitchell  
Email: amitchell50@gmail.com  
Phone: (805) 395-5116  
Fax: (510) 842-3758  
Address: 88 Hillside Blvd. Suite # 504  
Day City, CA 94014

Web: amjps.com  
commercialcleaningservicesdaycity.com  
NAICS: 561720 EIN: 87-2408640  
DUNS: 00-956-9092  
Certifications: CA 50-PW # 20222371

**A.M. JANITORIAL**

A.M. Janitorial strives to be the bay areas premier commercial cleaning & facility maintenance company servicing the entire bay area. We specialize in first class services at cost efficient rates. With over two decades experience working in the commercial cleaning & facility maintenance industry as an employee in the private as well as local government sector. We strive to be the bay areas foremost covid cleaning services & products provider. One of our primary goals is to assist in maintaining clean & sanitized virus free social spaces for our valued clients.

Established in 2021 | We accept Credit and Payment Cards.

**SAVVY MOVING COMPANY**  
SAVE MORE WITH SAVVY

CONTACT: Savvy All  
EMAIL: savvy@savvymoving.com  
CALL TODAY FOR A FREE ESTIMATE: 216-564-MOVE (6683) | 616-961-MOVE (6683)  
ADDRESS: SAVVY MOVING COMPANY  
200 University Blvd., Round Rock TX 78665  
WEB: www.savvymoving.com

SAVVY MOVING COMPANY specializes in commercial and residential moves. Our professional movers are skilled and experienced, ready for local or long distance moves. We have a modern fleet of trucks with the best tools and equipment to make your move a success. At Savvy, we take pride in providing professional service and delivering beyond expectations.

**RECENT CUSTOMERS**

1. CLEVELAND METRO SCHOOL DISTRICT  
RICHARD NOVAK  
PRIME VENDOR FOR MOVING SERVICES SINCE 2020 - PRESENT  
WAREHOUSE LABOR STAFFING  
IT EQUIPMENT DELIVERIES
2. CUYAHOGA METRO HOUSING AUTHORITY  
TARAYNE BANKS  
300 UNIT RELOCATION OF FAIRVIEW PARK
3. THE COMMUNITY BUILDERS  
MAIRI CIEPHEL & MEGHAN KAPPLER  
400 UNIT RELOCATION OF WOODHILL HOMES  
THE COMMONS PLACE, 200+ RESIDENTIAL MOVES  
PLUS 5 COMMERCIAL TENANT RELOCATIONS
4. HOUSING OPPORTUNITIES UNLIMITED  
TANITA MARUPPON  
COMPLETED LARGE SCALE CLEANOUTS, 50+ UNITS  
200+ RESIDENTIAL MOVES

**CONSTRUCTION CLEAN OUTS** Savvy is a preferred partner for large projects. Manage the budget with bulk pricing, even for staggered work. Onsite project leaders ensure the job gets done right, on time.

**CORPORATE RELOCATIONS** Whether your business is downsizing, relocating or expanding, having a reliable partner gives your team a go-to solution for company and employee relocation needs. We offer full packing, assembly and supplies.

**SAFE AND EFFICIENT MOVERS** Safety is our number 1 priority! Providing the proper training, gear and equipment keeps the project on schedule. Savvy is fully insured in the event of injury or damage.

Office Supplies  
Cleaning  
Junk Removal  
Disaster Cleaning  
Car Wash  
Crime Scene

- Event Setup
- Window Cleaning
- Roofing Cleaning
- Move In / Out Cleaning
- Portable Sanitation
- Junk Removal
- Disaster Cleaning
- Car Cleaning
- Car Wash
- Crime Scene

Days a week including holidays.  
We're ready to go above and beyond the general mover services & products.  
Our moves are often then need other corporate moves.

- Hole In The Wall Catering
- Downed By Apts.
- Trinity Auto Group
- Bankruptcy
- Cobwell Banker Residential Brokerage

## YEAR FOUR HIGHLIGHTS



Targeted Outreach & Engagement



Intake and Assessment



SB Preparation Phase One



Pre-Bid and Matchmaking Preparation and Technical Assistance



SB Preparation Phase Two: Bidding & Estimating Strategies/ PSA & DIR Compliance



Bid-Submission Analysis



Apparent Lowest Bidder Status/Handoff to Post Award



SEE EXPANDED DETAILS ON PAGE 7

THE BART SBSS PRE-AWARD PROGRAM HAS BEEN DESIGNED TO BE A CUSTOMIZED 'CONTINUUM OF TECHNICAL ASSISTANCE AND CAPACITY DEVELOPMENT' SERVICES. THERE ARE TEN POINTS ON THE TIMELINE:

# THE PRE-AWARD PROCESS



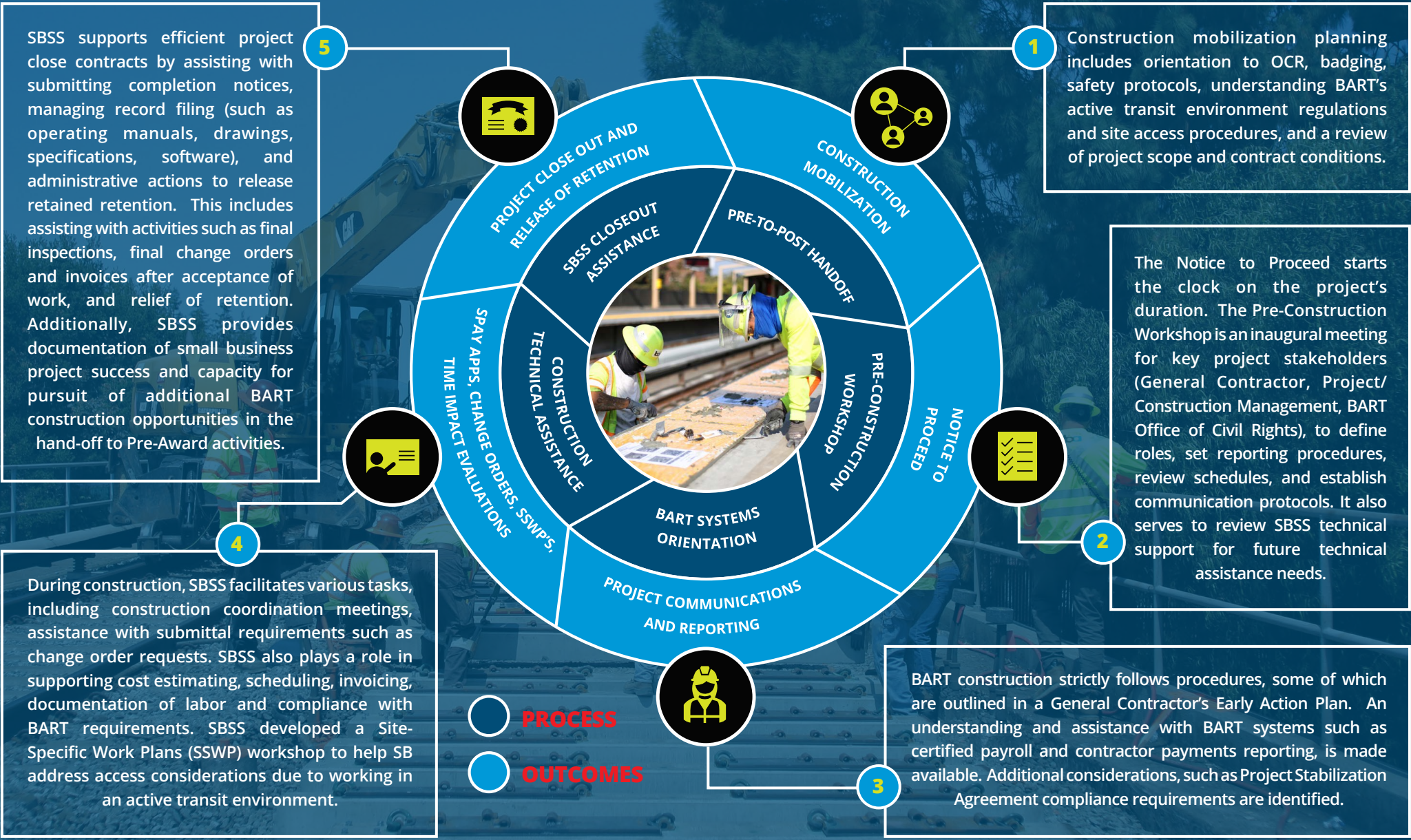
## SMALL BUSINESS SUPPORT SERVICES

THE STEPS	THE WORK	THE OUTPUT/OUTCOMES
<p><b>1</b> TARGETED OUTREACH AND ENGAGEMENT</p>	<p>Pre-Award services begin with comprehensive outreach targeted to Small, Minority, Women, Veteran and LGBT Businesses (SBs) with relevant licenses within 9-county Bay Area</p>	<p><b>OUTPUT:</b> Databases Matching Opportunities  <b>OUTCOMES:</b> Building the pool of qualified firms bidding to BART. More competition leads to lower bid prices.</p>
<p><b>2</b> INTAKE AND ASSESSMENT</p>	<p>Rigorous one-to-one assessment to identify strengths/weaknesses to make them more competitive in the BART procurement process</p>	<p><b>OUTPUT:</b> Business Specific Gap Analysis and Roadmap for Success  <b>OUTCOMES:</b> SBs address 'blind spots' in their business operations leading to greater competitiveness</p>
<p><b>3</b> SB PREPARATION PHASE ONE</p>	<p>Phase One: SBs are provided customized technical assistance to align themselves with specific scopes of work within the respective RFP</p>	<p><b>OUTPUT:</b> Statements of Qualifications and Communication Asset Development  <b>OUTCOMES:</b> Ability for SBs to more effectively convey their value to potential primes leading to increased teaming opportunities</p>
<p><b>4</b> PRE-BID AND MATCHMAKING PREPARATION AND TECHNICAL ASSISTANCE</p>	<p>Customized Technical Assistance to prepare the SB to leverage their participation in the RFP Pre-Bid and Matchmaking Session which includes review of RFP documents, special conditions, bidding requirements, plan holder lists</p>	<p><b>OUTPUT:</b> RFP Checklist Management  <b>OUTCOMES:</b> Ability to effectively build relationships with potential prime contractors and BART Procurement Program Managers</p>
<p><b>5</b> SB PREPARATION PHASE TWO: BIDDING &amp; ESTIMATING STRATEGIES/ PSA &amp; DIR COMPLIANCE</p>	<p>Phase Two: In preparation for bid submission SBs are provided assistance to ensure their bids are accurate, cost-effective and responsible with an emphasis on compliance to PSA/DIR compliance-related items</p>	<p><b>OUTPUT:</b> Increased Number of Accurate/Cost Effective Bids Being Submitted by SBs  <b>OUTCOMES:</b> Developing trust within the Prime Bidder Community from more SBs having stronger/more comprehensive bids</p>
<p><b>6</b> BID-SUBMISSION ANALYSIS</p>	<p>Following submission, and public posting, of bid information the SBs are offered a series of 'lessons learned' activities based on results and rankings of lowest apparent bids</p>	<p><b>OUTPUT:</b> Bid Tab Submission Report  <b>OUTCOMES:</b> SB has the opportunity to grow from the experience and either celebrate success or address deficiencies leading to increased success in future bidding opportunities.</p>
<p><b>7</b> APPARENT LOWEST BIDDER STATUS/HANDOFF TO POST AWARD</p>	<p>Engage and prepare SBs for critical path activities leading up to the Notice to Proceed for those selected as prime or subcontractors. The 'Pre-Award Process Loop' begins in earnest to keep the SBs engaged in bidding to BART</p>	<p><b>OUTPUT:</b> BART Publishes Notice to Proceed Document  <b>OUTCOMES:</b> SBs stay engaged with SBSS to engage on upcoming BART opportunities where they should be even more competitive in the bidding process.</p>

# POST-AWARD PROCESS AND OUTCOMES



## SMALL BUSINESS SUPPORT SERVICES





# POST AWARD TECHNICAL ASSISTANCE MARKET STREET CORRIDOR



## SMALL BUSINESS SUPPORT SERVICES

The Market Street corridor in San Francisco, a bustling thoroughfare for BART patrons and various commuters, undergoes significant construction, including escalators and canopies. This public-facing area demands efficient project delivery; SBSS prioritized BART projects along Market Street. Through outreach and involvement in preconstruction and progress meetings, SBSS supports small businesses in the construction, including but not limited to Hunt Masonry, Wickman Construction, CMC Traffic Control, Red Dipper, Mars Metal, Bay Tech Engineering, Bess Test Labs, and Coats Plumbing. SBSS assistance helps to achieve outcomes like timely project delivery, cost savings, schedule adherence, enhanced safety, and quality.

**MARKET STREET ESCALATORS (PROJECT # 15LK-120):** SBSS aided the Market Street Escalator Project (Project #15LK-120) during project mobilization by conducting a pre-construction workshop for Schindler Elevator and its subcontractors. In response to a request from the Schindler Elevator Project Manager during a weekly project status meeting, SBSS provided support for Bowers Electric regarding Certified Payroll Reporting (CPR) and B2Gnow enrollment and payment updates. This assistance ensured the accurate use and uploading of data into Elations and the B2Gnow systems, addressing critical aspects of public works construction documentation and payment tracking.

**POWELL STREET STATION (PROJECT # 15IF-140):** During project mobilization, SBSS conducted a pre-construction workshop for Proven Management and their subcontractors for two simultaneous projects: Powell Street Station Modernization and 19th Street Station Modernization. Assistance was provided to numerous subcontractors, including Professional Glass Installers (PGI) in addressing BART's Project Stabilization Agreement requirements, adjusting their proposed workforce with a Letter of Intent, and navigating the change order process. Bay Tech Engineering received support with the SSWP submission and approval process, addressing unforeseen conditions and a materials issue, while Coats Plumbing was assisted with O&M manuals for project close-out.

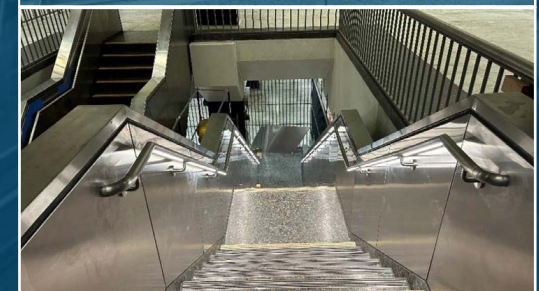
**CIVIC CENTER SCISSORS STAIRS (PROJECT # 11IA-112):** Wickman Development and Construction (GC) received assistance in comprehending BART's contractual requirements, invoicing, pay application process, and a time impact evaluation. Red Dipper Electric (subcontractor) overseeing LED lighting procurement and installation was guided through BART's materials substitution process. Mars Metal (subcontractor) received support with BART's Change Order process.



**MARKET STREET ESCALATORS  
(15LK-120)**



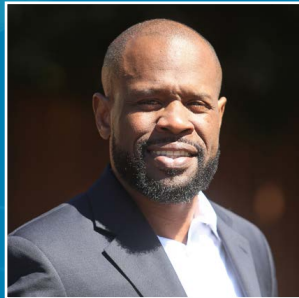
**POWELL STREET STATION  
(15IF-140)**



**CIVIC CTR. SCISSORS STAIRS  
(11IA-112)**



# SMALL BUSINESS SUPPORT SERVICES



## SBSS SUCCESS STORIES



### MATHEWS GEC



Mathews General Engineering and Construction is a small, minority-owned, and certified General Contracting company specializing in site-preparations, earthwork, demolition, grading, and paving. Mathews is signatory to the Operators and Labor Unions.

“ SBSS was a lifeline to me and my business. They helped me unravel the BART procurement process so that I could systematically identify projects that are coming up that I can bid on. They have assisted me in building up my company’s marketing materials and they have introduced me to some key decision makers that can make a real difference to my business.

”

**ACIE MATHEWS**

CEO, MATHEWS GENERAL ENGINEERING & CONSTRUCTION

### LANER ELECTRIC SUPPLY



Laner Electric Supply is a woman, minority and LGBT certified firm based in Richmond, California. operating from a 16,000 square foot administrative, and lay-down facility providing electrical construction supplies, kitting, and construction installation with their seasoned network of contractors.

“ I’ve found the SBSS Program incredibly important to the growth of my business which has led to substantive contract opportunities with BART. SBSS’s attention to detail in creating and updating my firm’s Statement of Qualifications document and meaningful introductions to key decision makers within the BART procurement network and prime contractors over the last three years have been immeasurable.

”

**SANDRA ESCALANTE**

CEO, LANER ELECTRIC SUPPLY

### TRI-VALLEY EXCAVATING



Located in Sunol, California for thirty-five years, Tri-Valley Excavating is a certified small business which provides site work construction including soil stabilization, subgrade remediation, and hazardous materials abatement. In addition, they provide preparation for landscaping including bio swales and bio systems, installation of drain rock and installation of drainage systems.

“ We have been successful in bidding to other Bay Area public transportation agencies but bidding on BART projects was elusive to us. That was until we started working with the BART SBSS Pre-Award Program. I’m proud to say we have just submitted our first bid to BART as a prime on the A-Line Project. We are now awaiting the results of that bid and look forward to working with BART in an official capacity. ”

**MOLLY GALEDRIDGE**  
PROJECT MANAGER, TRI-VALLEY EXCAVATION

### PATRIOT CONTRACTING



Patriot Contracting, Inc. is serving the commercial, public works, and federal construction community as a full-service general contractor offering specialized services in the areas of roofing, waterproofing, and exterior wall panels.

“ The SBSS team is not only knowledgeable but also incredibly responsive. Thank you for going above and beyond! The team has really shown they care about our success. ”

**SAM KHALILI**  
SENIOR PROJECT MANAGER, PATRIOT CONTRACTING



### BAY TECH ENGINEERING



Angelo Kalaveras is the proprietor of Bay Tech Engineering, a company with a 9-year history in the commercial, public works, and federal construction sectors as a certified Small Business Enterprise and Disadvantaged Business Enterprise. Specializing in general and electrical contracting, Bay Tech Engineering provides tailored services within the San Francisco Bay Area.

“ We were not aware of the actual level of support and professionalism SBSS provided until we reached out. Once we did, we received all of the support and knowledge we needed to turn things around. ”

**AARON ROACH**

PROJECT MANAGER, BAY TECH ENGINEERING

### WICKMAN DEVELOPMENT & CONSTRUCTION



Owner, Jonathan Wickman established Wickman Development and Construction, in 2012; he envisioned a construction company that provides highly regarded commercial, general engineering, and construction serving the ever-growing industry in the San Francisco Bay Area.

“ I needed a quick response for my project, and SBSS delivered. I'm grateful for a team that is committed to helping us and our subs. Thanks again. ”

**MICHAEL CLEVELAND**

PROJECT MANAGER, WICKMAN DEVELOPMENT & CONSTRUCTION

# WHO DO I CONTACT?



## SMALL BUSINESS SUPPORT SERVICES



**FEI LIU**  
SBSS Program Administrator  
510-874-7348  
fliu@bart.gov



**PAUL PENDERGAST**  
Pre-Award Program Administrator  
415-290-7780  
paul@pendergastconsultinggroup.com



**HARRY OVERSTREET II**  
Post-Award Program Administrator  
510-989-2434  
harry@the-allen-group.com

**FOR MORE INFORMATION ON THE SBSS PROGRAM VISIT:**

**WEB:** [www.bart.gov/about/business/ocr/services](http://www.bart.gov/about/business/ocr/services)

**EMAIL:** [SBSupportServices@bart.gov](mailto:SBSupportServices@bart.gov)