



**DISTRICT OF COLUMBIA
WATER AND SEWER AUTHORITY**

Board of Directors

Meeting of the Governance Committee

January 8, 2020

9:00 a.m.

**Meeting Location: 1385 Canal Street, SE
2nd Floor-Board Room**

AGENDA

- 1. **Call to Order** **Ellen Boardman, Chairperson**
- 2. **District resident participation with DC Water** **Korey Gray, Compliance Officer**
- 3. **Proposed Changes to the Business Development Plan** **Korey Gray
Compliance Officer**
- 4. **Executive Session ***
- 5. **Adjournment**

*The DC Water Board of Directors may go into executive session at this meeting pursuant to the District of Columbia Open Meetings Act of 2010, if such action is approved by a majority vote of the Board members who constitute a quorum to discuss: matters prohibited from public disclosure pursuant to a court order or law under D.C. Official Code § 2-575(b)(1); contract negotiations under D.C. Official Code § 2-575(b)(1); legal, confidential or privileged matters under D.C. Official Code § 2-575(b)(4); collective bargaining negotiations under D.C. Official Code § 2-575(b)(5); facility security under D.C. Official Code § 2-575(b)(8); disciplinary matters under D.C. Official Code § 2-575(b)(9); personnel matters under D.C. Official Code § 2-575(b)(10); proprietary matters under D.C. Official Code § 2-575(b)(11); decision in an adjudication action under D.C. Official Code § 2-575(b)(13); civil or criminal matters where disclosure to the public may harm the investigation under D.C. Official Code § 2-575(b)(14), and other matters provided in the Act.



District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

Overview of District Resident and CBE Participation with DC Water

Presented to the

Governance Committee

Ellen Boardman, Chairperson

Wednesday, January 8, 2020



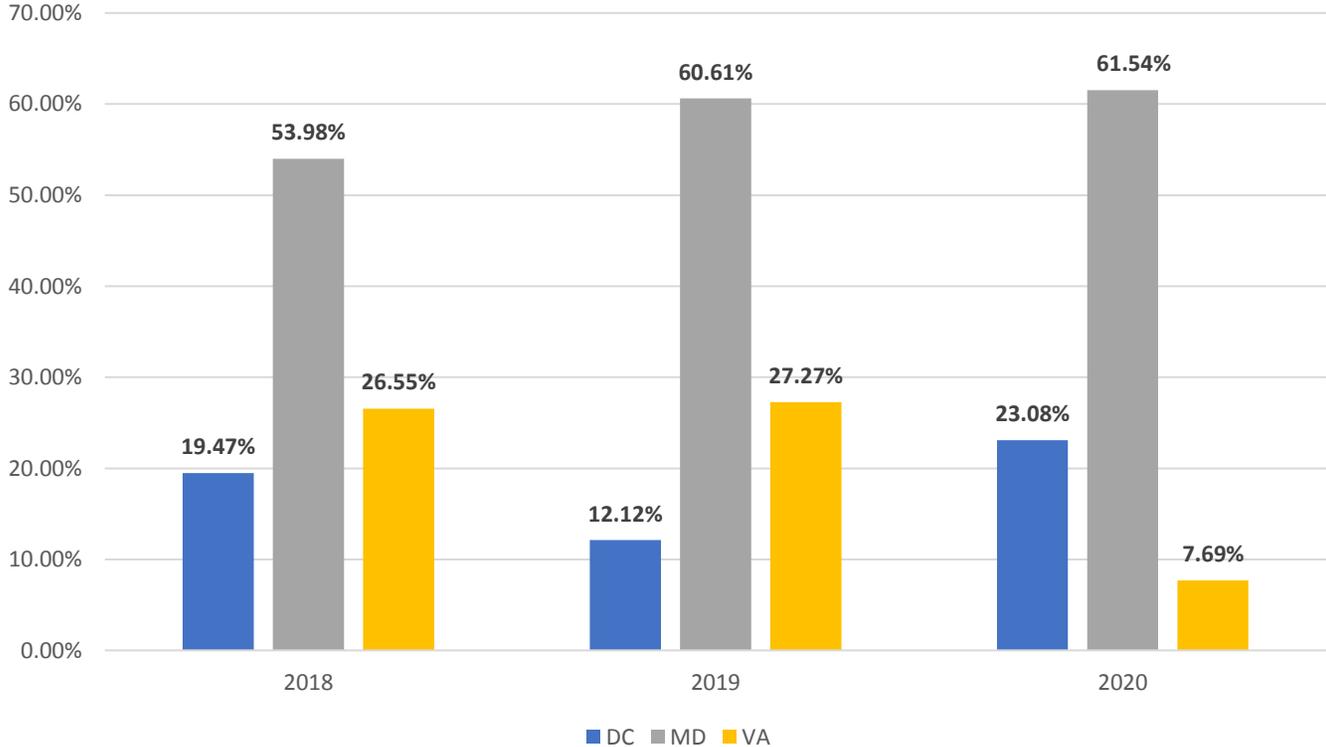
District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

Overview of District Residents Working at DC Water



District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

New Hires by Fiscal Year



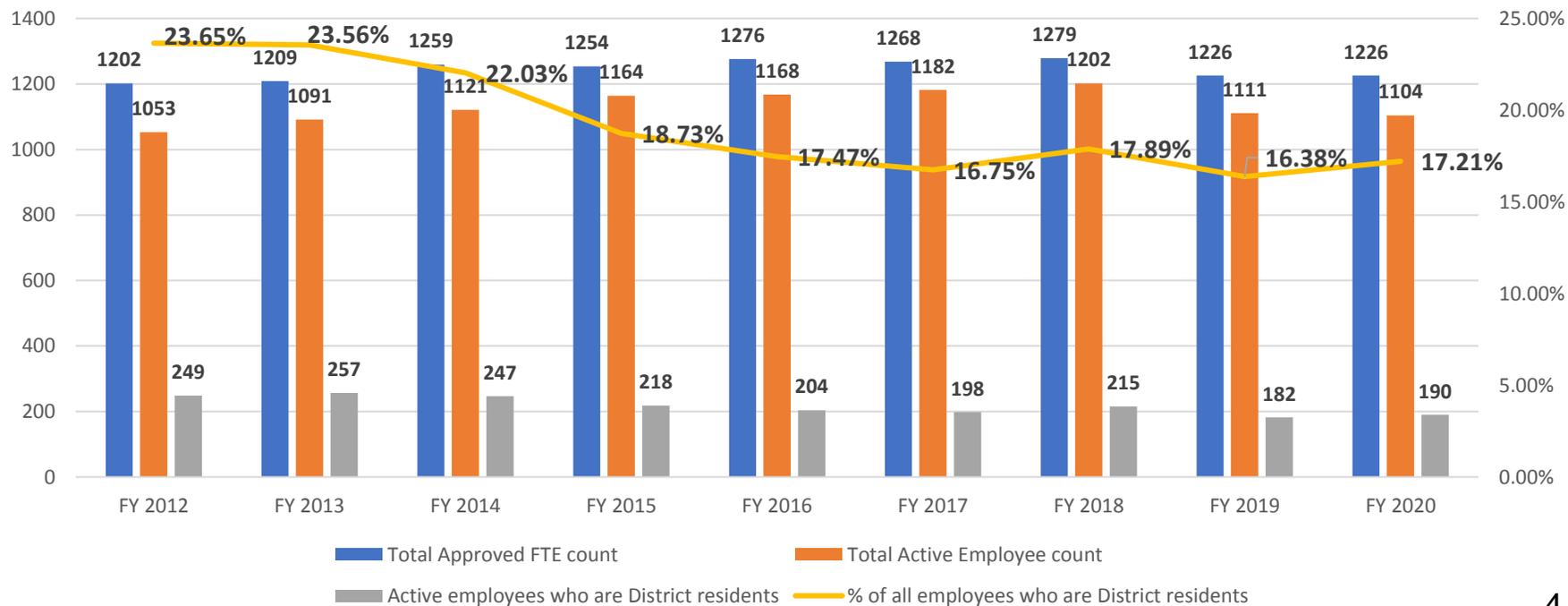


Overview of DC Water’s District Resident Employees

The following summarizes the percentage of District residents who are DC Water employees.

- As of December 31, 2019, there are 1104 full time employees at DC Water.
 - Of this amount, 190 are District Residents (17.21%).

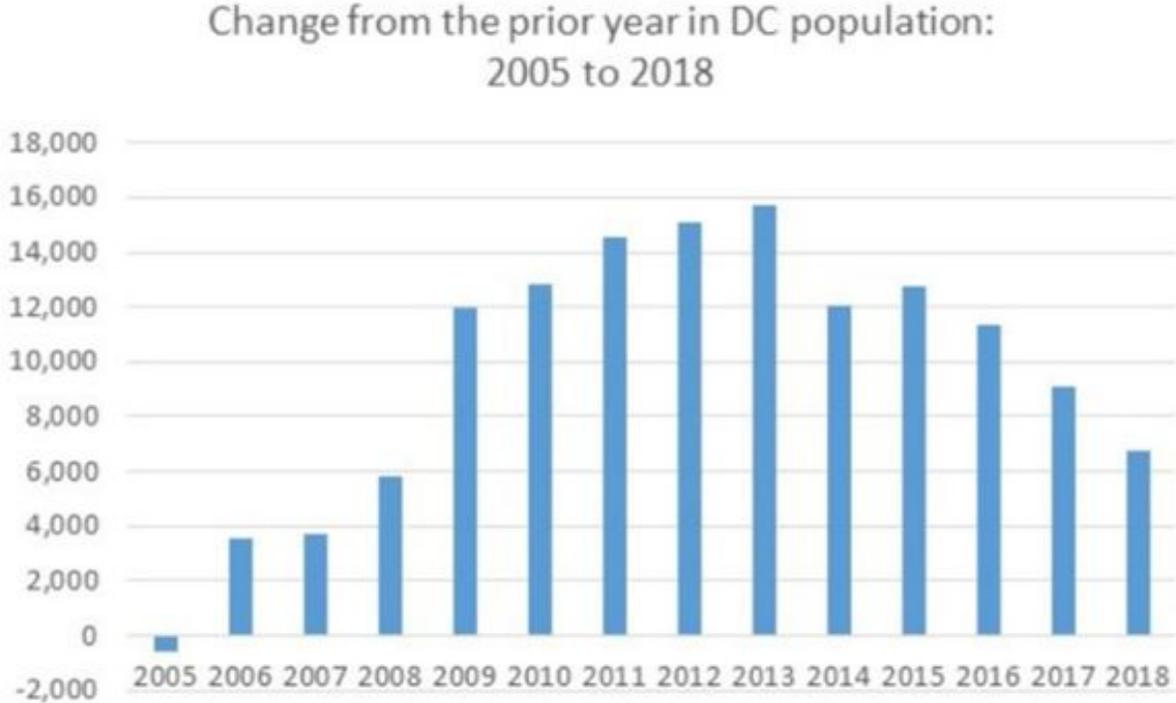
DC Residents Historical Data





District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

Overview of DC Water’s District Resident Employees



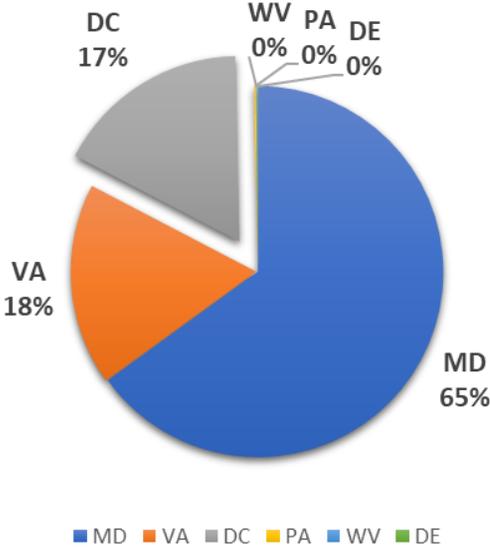
This graph shows the year-to-year change in D.C.’s population growth. People steadily moved into the city from 2006 to 2013, but since then the number of people coming in has declined from the year before it, save 2014 to 2015.

Office of the D.C. Chief Financial Officer

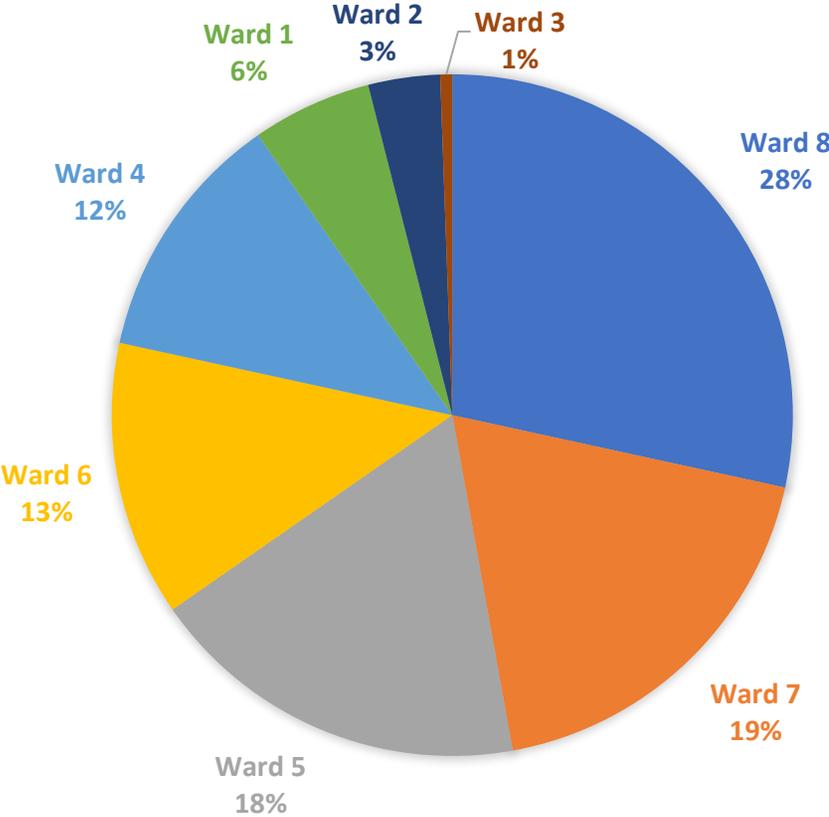


Overview of DC Water’s District Resident Employees

Employee Workforce by State Residence



DC Employees by Ward





Overview of DC Water's District Resident Employees

Looking Ahead...

DC Water recognizes the importance of creating and maintaining a strong local workforce, Accordingly, in FY 19, DC Water launched the following initiatives:

➤ DC Apprenticeship Program

- In partnership with the DC Water Works Program the DCW apprenticeship program established.
 - 15 positions created/filled, all with District Residents.

➤ Strategic Partners

- DC Water is working on implementing a new referral partners list (similar to the DC Water Works Strategic Partners) to identify candidates for DC Water in-house positions.

➤ Community Outreach

- DC Water, is participating in various workforce development initiatives at the high school level to foster interest in both skilled positions and engineering majors in college:
 - Collaboration with the University of the District of Columbia to establish a new "**Career Connections**" program.
 - **Engineering Tomorrow Workshops:** (high school students with engineering and mathematics backgrounds). Students participate in hands-on activities and meet with working engineers as well as college engineering majors throughout the day.
 - In collaboration with **Workforce Investment Council**, developing skills-tracks and CTE standards for the water/wastewater industry.
 - School-Based Programming such as:
 - a. Cardozo High School **Industry Day and Summer Infrastructure Careers Gateways Program** where students participate in a 1-week immersive experience in the water industry.
 - b. Supporting a curriculum design for **2020 Civil Engineering Academy** at Anacostia High School.
 - c. Ongoing partnership with Cardozo High School, Friendship Technology Prep, Phelps ACE Academy and other Engineering Academies to foster interest in careers through field trips and lesson planning with educators.



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David L. Gadis, CEO and General Manager

Overview of District Resident Employment on DC Water Projects



District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

Overview of District Resident Participation on DC Water Projects



Goals

- Fifty-One percent (51%) of the total contractor workforce will be local residents.

- Sixty percent (60%) of new jobs created by contracts or procurements entered into by DC Water with contractors will be filled by local residents.
 - New Jobs mean both union and non-union job openings, including vacancies created as a result of internal promotions, terminations or other separations, and expansions of the contractor's workforce.

Primary Sources of tracking data

- Certified Payroll Reports

- Periodic Surveys to Contractors



Overview of District Resident Participation on DC Water Projects

The following data summarizes the employment data of active Construction and Goods and Service Projects as of September 30, 2019

As of September 30, 2019, there were:

- Tracking Eighty-Six (86) Active Projects (Construction, Goods and Services)
 - Actual labor on the project
- 7,876 contractor job positions on Construction and Goods and Service projects.
 - 4,075 positions (51.7%) were filled (transfers and new hires) by residents within DC Water’s User Jurisdiction.
 - 938 positions (11.9%) were filled (transfers and new hires) by District of Columbia residents.

	# of Positions	%
➤ User Jurisdiction	4,075	51.74%
○ DC	938	11.9%
○ MC	556	7.1%
○ PGC	1906	24.2%
○ FC	578	7.3%
○ LC	97	1.2%
➤ Outside User Jurisdiction	3801	48.3%
Total	7,876	

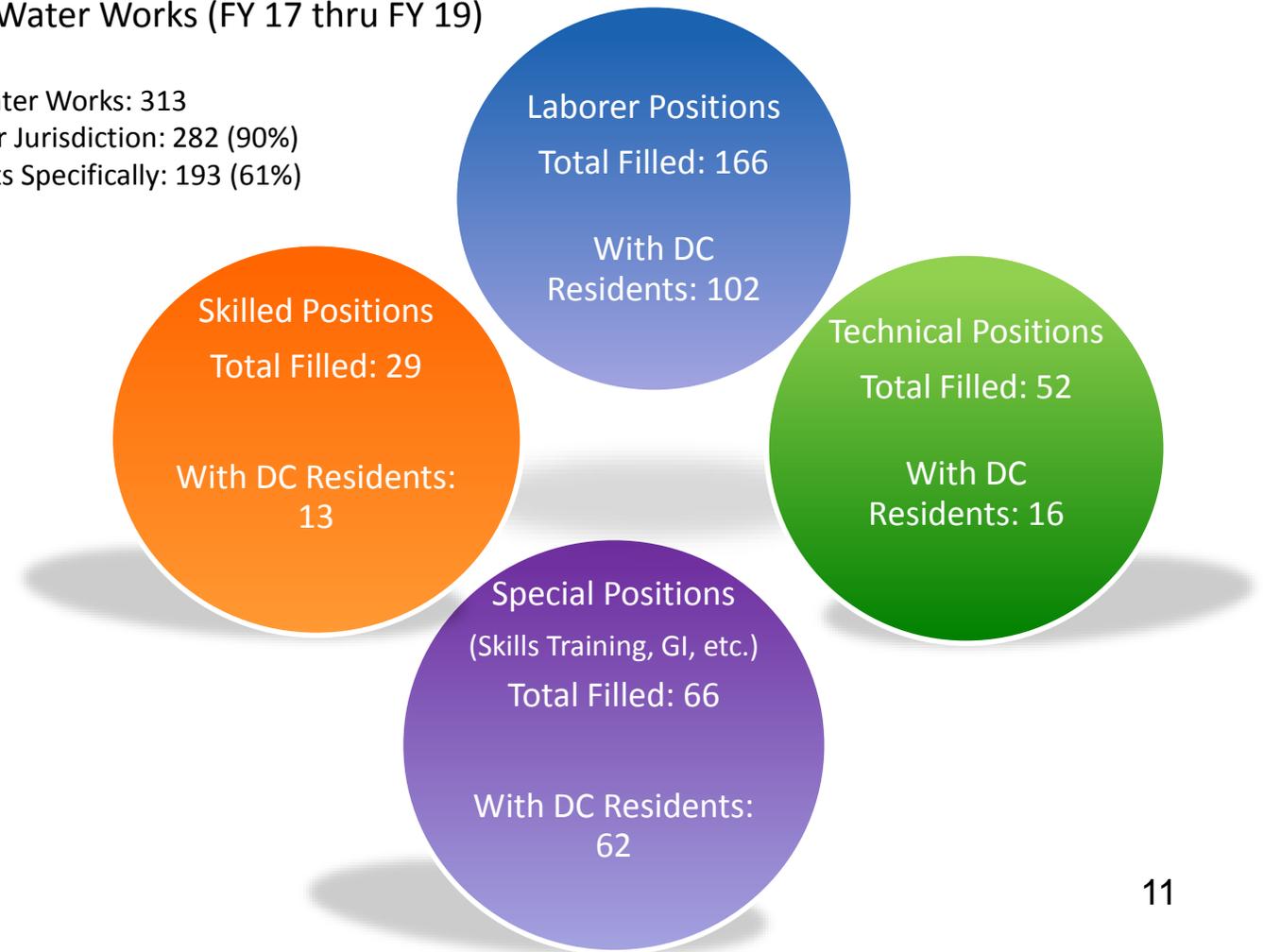


Overview of District Resident Participation on DC Water Projects

New Opportunities filled through Water Works (FY 17 thru FY 19)

Total Contractor Positions filled thru Water Works: 313

- Total Filled by Residents of the User Jurisdiction: 282 (90%)
 - Total Filled by District Residents Specifically: 193 (61%)





District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

Overview of Certified Business Enterprise (CBE) Participation



Overview of Certified Business Enterprise (CBE) Participation

CBE is a unique certification program through the District of Columbia Department of Small and Local Business Development.

- 3 Year Certification

- Comprises 8 different certification categories
 - Local Business Enterprise
 - (Local) Small Business Enterprise
 - (Local) Disadvantaged Business Enterprise
 - Development Enterprise Zone
 - Resident Owned Business
 - Longtime Resident Business
 - Veteran-Owned Business Enterprise
 - Local Manufacturing Business Enterprise

- Certification as a Local Business Enterprise (LBE) is a prerequisite to be certified in any additional business enterprise category.

- Not affiliated with the DBE certification conferred by the District Department of Transportation.

- CBE Certification cannot be used to satisfy the Environmental Protection Administration's Fairshare Objectives.
 - CBE certification does not test for US Citizenship



Overview of Certified Business Enterprise (CBE) Participation

Current application on DC Water Projects:

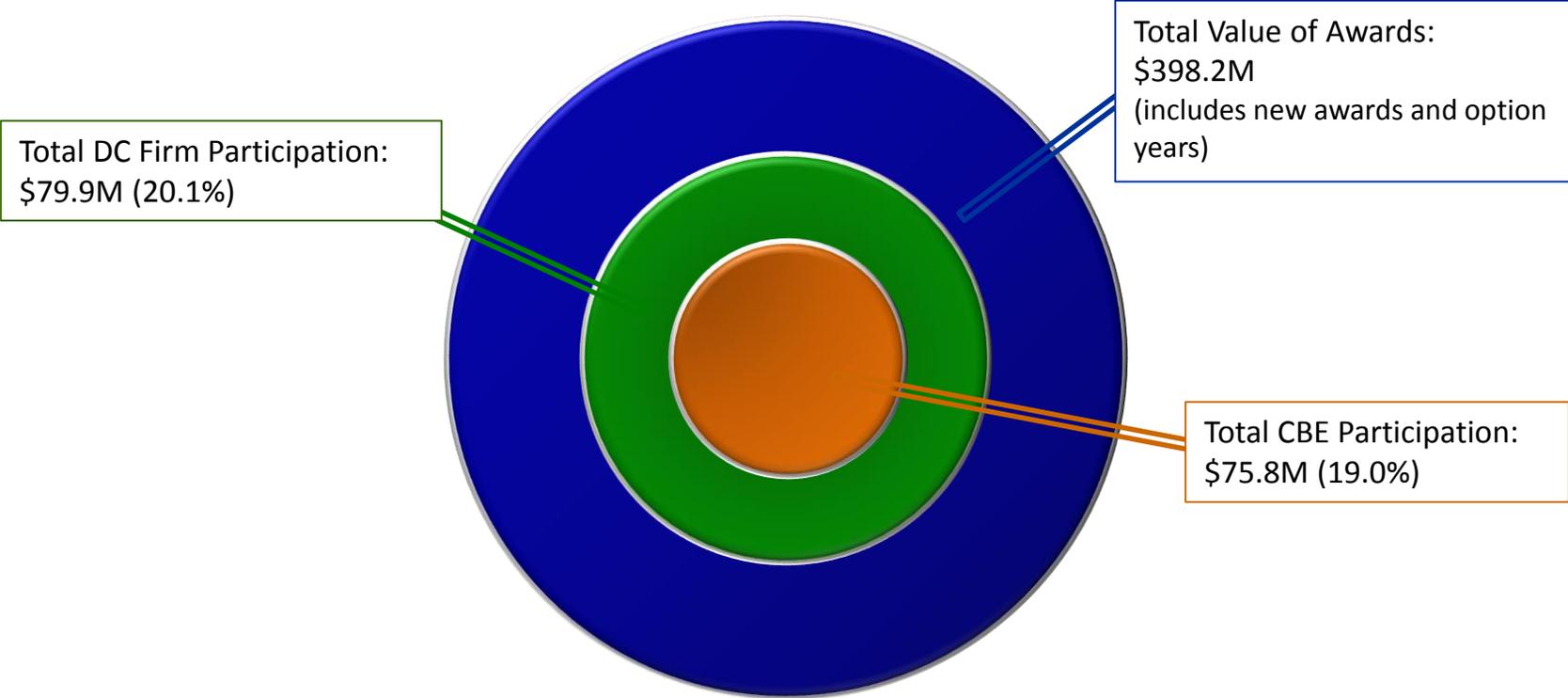
- Micro Purchases
 - No formal consideration, but CBE utilization is encouraged
- Simplified Acquisitions
 - CBE Certification is encouraged
- Large Goods and Services
 - CBE Certification is recognized (preference points given)
 - 5 pts for LBE
 - 5 pts for SBE
- Green Infrastructure MOU Projects
 - CBE Certification is recognized (50 % CBE Goal)
 - Any CBE certification accepted
- EPA Eligible/Funded Projects
 - CBE Certification is not recognized (no CBE Goals)



Overview of Certified Business Enterprise (CBE) Participation

FY 18 – FY 19 Awards

CBE’s Participation Trade (A/E, Construction, and Goods and Services)



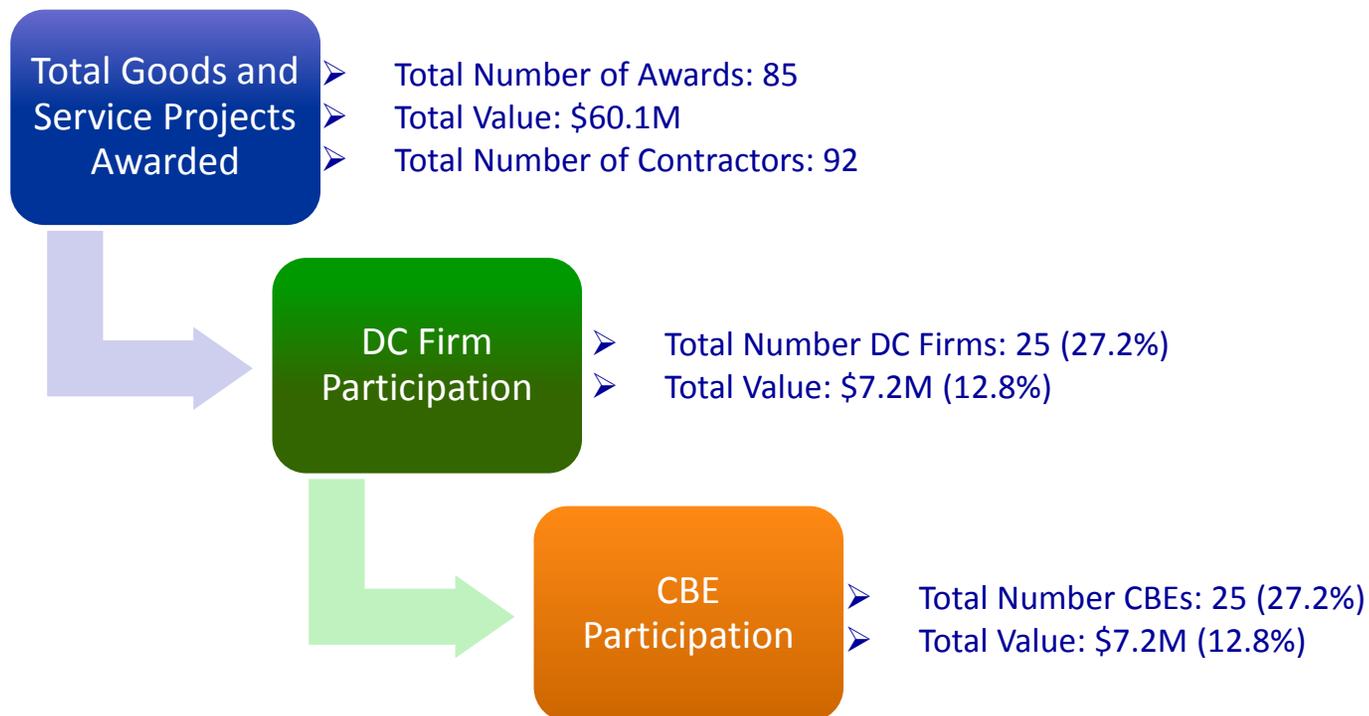


Overview of Certified Business Enterprise (CBE) Participation – Goods and Services

CBE Certification recognized

- Projects Awarded with Preference Points
 - 5 Points for Certified Local (only)
 - 10 Points for Certified:
 - Local Small
 - Local Disadvantaged

CBE Participation on Goods and Services Projects FY 18 and FY 19



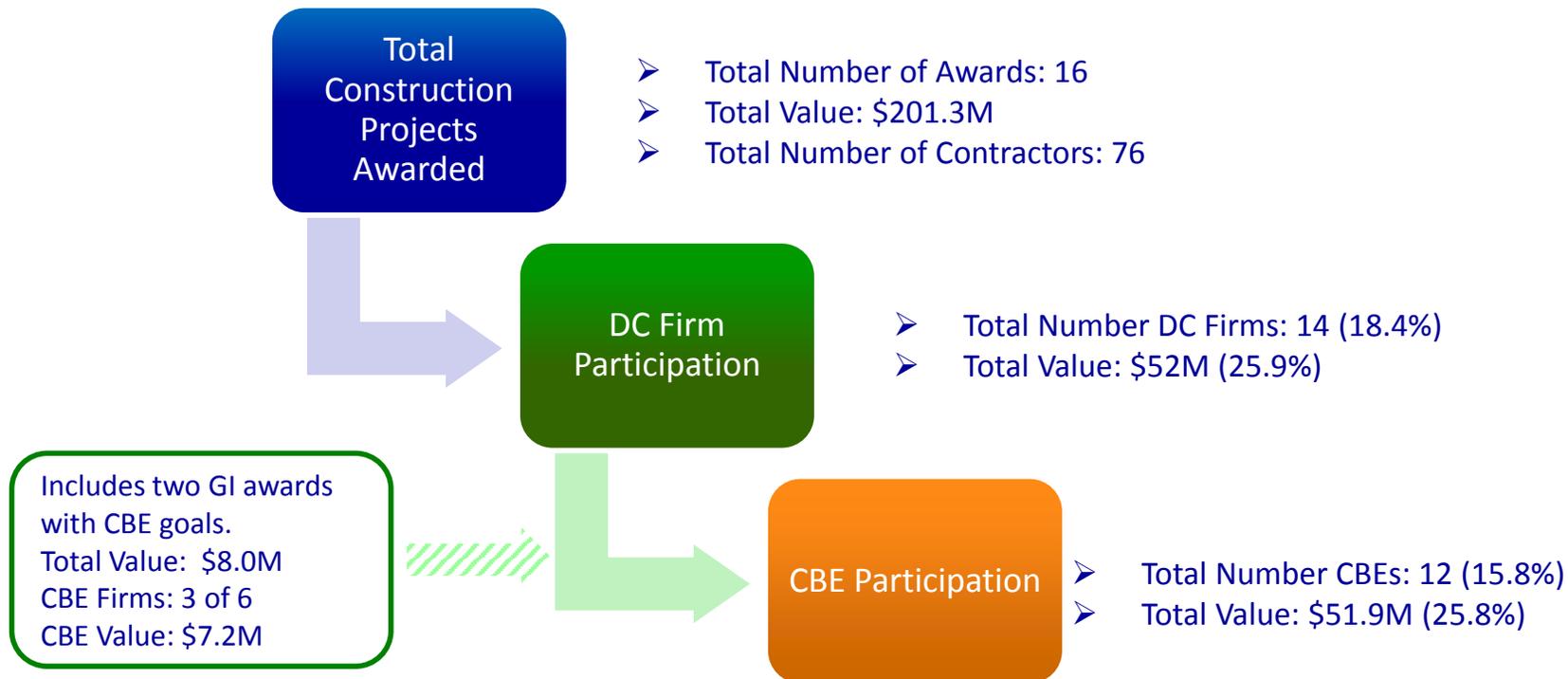


Overview of Certified Business Enterprise (CBE) Participation – Construction

CBE Certification not recognized on EPA Projects

- CBE Certification is recognized on the Green Infrastructure Projects
 - 50% CBE Goal (per MOU)

CBE Participation on Construction Projects Awarded in FY 18 and FY 19

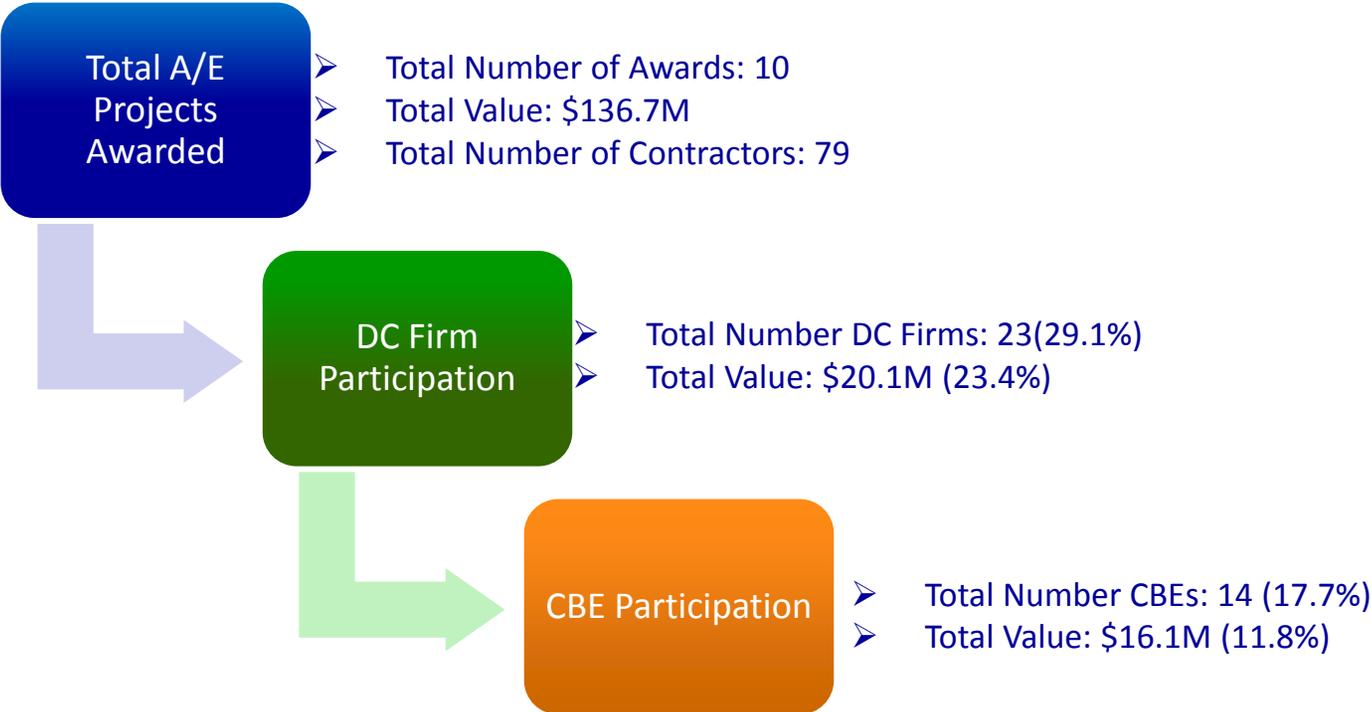




Overview of Certified Business Enterprise (CBE) Participation – A/E

- CBE Certification not recognized on EPA Projects
 - CBE Certification is recognized on the Green Infrastructure Projects
 - 50% CBE Goal (per MOU)

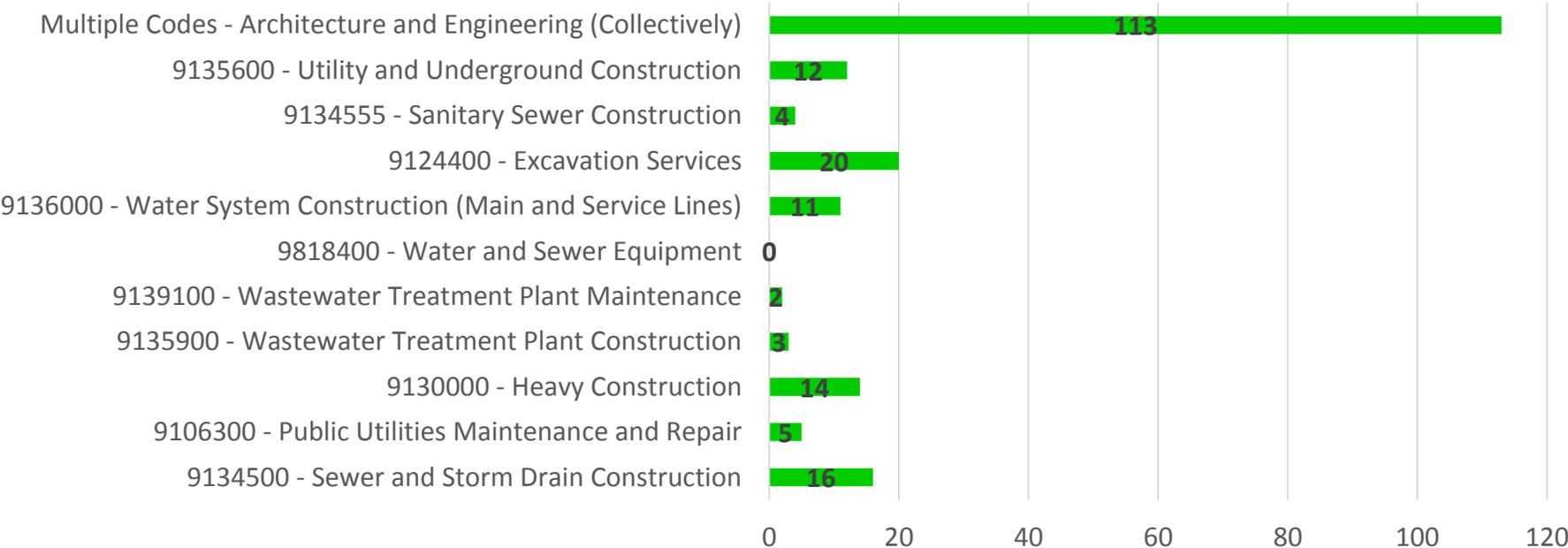
CBE Participation on A/E Projects Awarded in FY 18 and FY 19





Summary of Certified Business Enterprises with the District of Columbia Department of Small and Local Business Development (by Code)

CBE's By Trade (A/E and Construction)



Source: The District of Columbia Department of Small and Local Business Development (DSLBD) Certification Database:
https://dslbd.secure.force.com/public/DC_CBE_Certified_Contractors_Search



District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

Proposed Changes To The District Of Columbia Water And Sewer Authority Business Development Plan

Presented
Wednesday, January 8, 2020





Proposed Changes to the Business Development Plan

Agenda

- I. Basis for Proposed Changes
- II. Overview of DC Water's current Business Development Program
 - Goals and Objectives
 - Discretionary Funded Projects
 - Federally Funded Projects
- III. Summary of the Review Process to Proposed Changes to the Business Development Plan
 - Internal Review Team
 - Public Outreach
- IV. Overview of the Proposed Changes
 - General Updates
 - Update to the Local Small Business Enterprise Program
 - Updates to the Fair Share Objectives Program
 - Creation of a new Disadvantaged Business Enterprise Program
 - Updates to the Business Development/Capacity Building Elements



District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

Rationale for Updating the Business Development Plan

Basis for Proposed Changes:

- [Board Requirement](#) (See Attachments – “Basis for Changes”, Tab 3)
- [In response to the 2017 Audit \(RSM\) Findings](#) (See Attachments – “Basis for Changes”, Tab 3)
- [To conform with existing \(federal\) guidance and practices](#) (See Attachments – “Summary of EPA’s Rule Changes to the Fair share Program”, Tab 4)
- [To \(further\) clarify contractor requirements and expectations](#)
- [In response to requests and suggestions made by DC Water staff and contractors](#)



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Rationale for Updating the Business Development Plan

Overview of DC Water's current Business Development Program

DC Water's Business Development Plan was adopted by the Board on June 3, 1999.

GOALS

The District of Columbia Water and Sewer Authority (DC Water) is committed to promoting economic and business development in the District of Columbia and the local region it serves.

DC Water actively encourages and supports the participation of certified local businesses, local small business enterprises, and disadvantaged (minority and women-owned) business enterprises in its contracting and procurement activities, at all tier levels.

OBJECTIVES

To foster the growth and competitiveness of the local, small, and minority/women-owned business community.

To encourage participation on DC Water procurements.

To assist the development of firms that can compete on an equal footing in the market place and have a positive impact on the regional economy.



Rationale for Updating the Business Development Plan

Overview of DC Water's current Business Development Program

Local and Local Small Business Enterprise Program for Discretionary Projects

Board established Program

- A geographic preference program
- Not Race Based
- Encourages participation by local and small firms in the User Jurisdiction
- To participate, firms must be certified by an authority recognized by DC Water.
 - DC Water does not certify firms.
- Utilization of Preference Points
 - Local = 5 points**
 - Small = 5 points**
 - Firms may be certified as local and receive 5 points OR
 - Firms may be certified as small and receive 5 points OR
 - Firms may be certified as local and small and receive 10 points

The maximum number of eligible preference points for a proposal is ten (10) points.

Under no circumstances will firms be allowed to receive more than a 10 point preference in the evaluation of proposals



Rationale for Updating the Business Development Plan

Overview of DC Water's current Business Development Program

Fair Share Objectives for Projects Eligible for Federal Funding

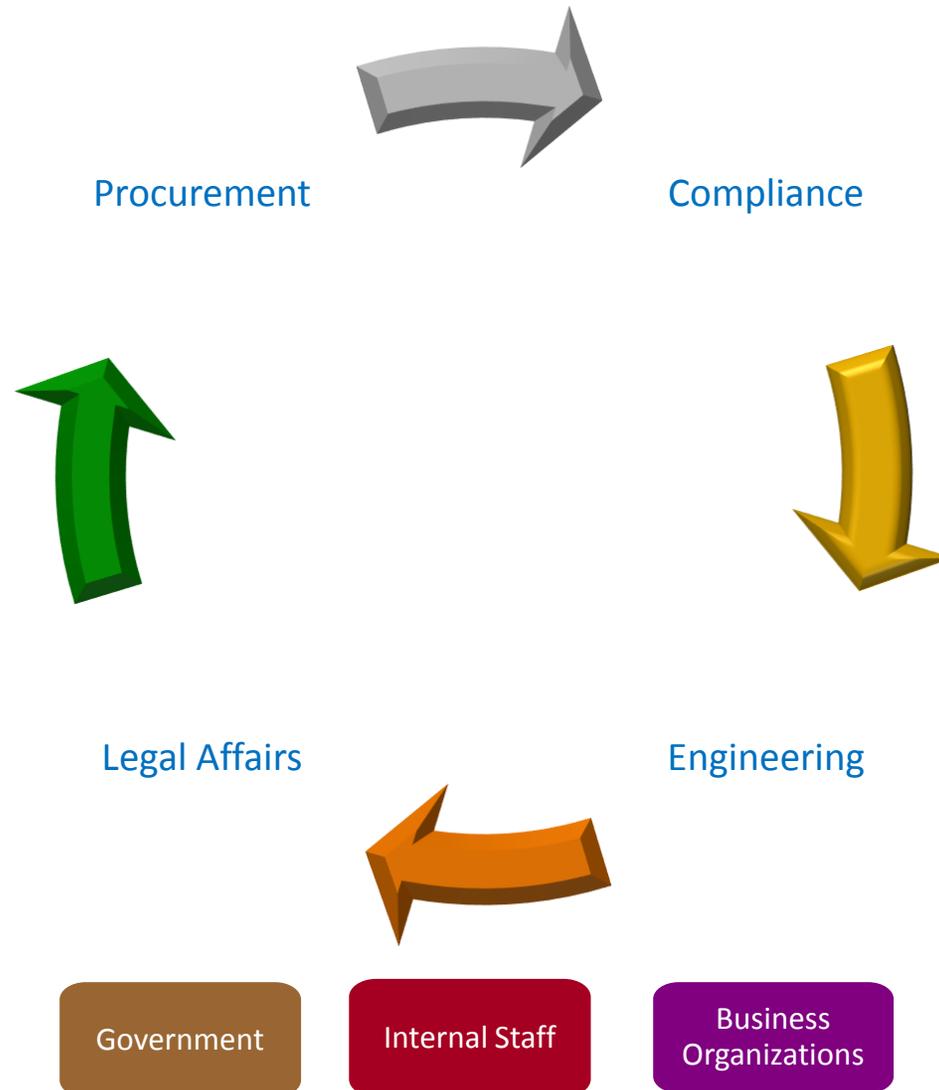
- 40 CFR Part 33
- DC Water's policy is to meet or exceed EPA Objectives for DBE participation in prominent and leadership roles
 - 32% DBE and 6% WBE Participation on Construction Projects
 - 28% DBE and 4% WBE Participation on A/E Projects
- Institution of Six (6) Affirmative Steps to ensure DBEs have equitable access to the available procurements.
 - Exceed goals in dollars paid to certified firms as well as to the number of certified firms participating on DC Water Projects.
- Monthly Reporting to DC Water
- Reporting to the Environmental Protection Agency



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Business Development Plan Review

Review Process





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Business Development Plan Review

Public Outreach (December 2018 – June 2019)

- Conducted 7 Information Sessions/Meetings with over 80 firms and organizations (Prime Contractors; Certified Subcontractors; Suppliers; Business Organizations; District and Federal Agencies)

Timeline of Outreach

- December 12, 2018 – 1st Lunch and Learn (27 Participants)
- January 29, 2019 – 2nd Lunch and Learn (8 Participants)
- March 7, 2019 – 3rd Lunch and Learn (27 Participants)
- March 22, 2019 – Meeting with DSLBD
- May 22, 2019 – 4th Lunch and Learn (16 Participants)
- May 29, 2019 – Fort Myer Round Table (14 Attendees)
- June 20, 2019 – Meeting with Maryland Washington Minority Contractor's Association

Additional Meetings held with representatives from:

- The Environmental Protection Agency
- The Small Business Administration
- The University of the District of Columbia
- The United States Department of Transportation, Office of Civil Rights
- The Washington Area Small Business Development Center (at Howard University)

- Received over 40 Comments and Suggestions

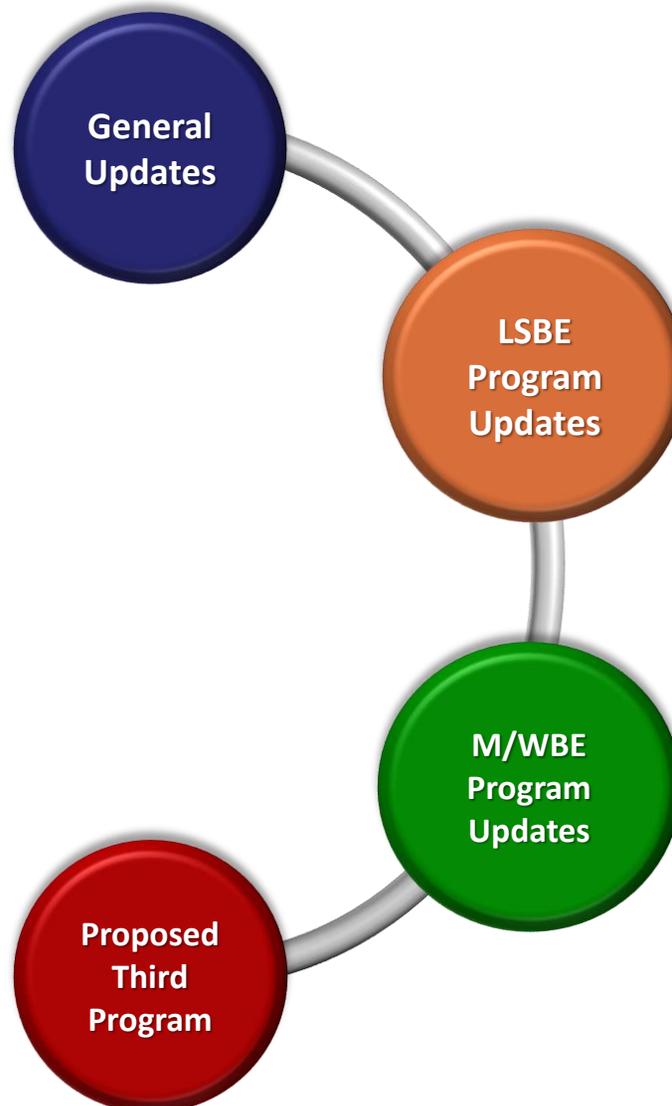




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David L. Gadis, CEO and General Manager

Business Development Plan Review

Proposed Changes





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Business Development Plan Review

General Updates

➤ Updating Certifying Bodies

- For the LSBE Program - (Page 6, Section I. C., "Eligible Program Participants")
- For the EPA Fair Share Program - (Page 14, Section III. B. , "MBE/WBE Certification")



District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

Local/Small Business Enterprise Program for Small Purchases and Procurements



Business Development Plan Review

Local Small Business Enterprise Program Updates

Program Component	Current Provisions	Proposed Changes
Micro Purchases	<ul style="list-style-type: none"> ➤ Micro Purchases are not included in the Business Development Plan ➤ LSBE Participation is not mentioned (but encouraged in practice) 	<ul style="list-style-type: none"> ➤ Incorporate Micro Purchases into the Business Development Plan ➤ Preference given to LSBE Participation <p>(Page 6, Section I.B.3, “Micro Purchases”)</p>
Simplified Acquisitions	<ul style="list-style-type: none"> ➤ Simplified acquisitions may be limited to LSBE firms when there are at least two such firms capable of doing the work ➤ End User Departments are responsible for sourcing 	<ul style="list-style-type: none"> ➤ Simplified acquisitions may be limited to LSBE firms when there are at least two such firms capable of doing the work ➤ Preference Points will apply to Simplified Acquisitions ➤ Procurement/ Compliance is responsible for identifying LSBE firms. <p>(Page 6, Section I.B.2, “Simplified Acquisitions”)</p>
Large Procurements	<ul style="list-style-type: none"> ➤ Preference applies to all non-federally assisted projects valued at \$100k or greater 	<ul style="list-style-type: none"> ➤ Preference applies to all non-federally assisted projects valued between \$100k and \$1M <p>(Page 4, Section I.A, “Overall Local and Small Participation Goals”)</p>



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Environmental Protection Agency Fair Share Objectives for Federally Assisted Projects



Business Development Plan Review

EPA Fair Share Objectives

Program Component	Current Provisions	Proposed Changes
Applicability	<ul style="list-style-type: none"> ➤ All projects not specified as Open with Preference (Projects could be federally supported or not) 	<ul style="list-style-type: none"> ➤ All projects clearly identified as funded or submitted to the EPA (DDOE) for funding
Good Faith Efforts	<ul style="list-style-type: none"> ➤ Summarized 	<ul style="list-style-type: none"> ➤ Detailed (Page 13, Section III.A.2, “MBE/WBE Program Design”)
Reporting Requirements	<ul style="list-style-type: none"> ➤ Quarterly 	<ul style="list-style-type: none"> ➤ “As required by 40 CFR Part 33” (Annually)
MBE Definition	<p>For the purpose of the federal mandated program and fair share objectives, at least one of the following:</p> <ol style="list-style-type: none"> 1. A business which is certified as socially and economically disadvantaged by the Small Business Administration; or 2. A business which is certified as a minority business enterprise by a state or federal agency; or 3. An independent business concern which is at least 51% owned and controlled by minority group member(s). 	<p>For the Purposes of the Fair Share Program, the EPA defines an MBE as a DBE that is:</p> <ul style="list-style-type: none"> ➤ A firm owned by a socially and economically disadvantaged individual(s) or a Historically Underutilized Small Business <p>(Page 21, Section VIII, “Glossary”)</p>



Business Development Plan Review

EPA Fair Share Objectives

Program Component	New Provision (40 CFR Part 33.302(a))
MBE and WBE Certification	➤ Detailed (Page 14, Section III.B, “MBE/WBE Certification”)
Counting MBEs and WBEs	➤ Detailed (Page 14, Section III.C, “Counting MBE/WBE Participation”)
Substitution of MBE or WBE Subcontractors	➤ Detailed (Page 15, Section III.D, “Substitution”)
Payments to Subcontractors	➤ Detailed (Page 15, Section III.E, “Payments to Subcontractors”)



District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

Disadvantaged Business Enterprise/ Women Business Enterprise Program for Non–Federally Assisted Projects



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David L. Gadis, CEO and General Manager

Business Development Plan Review

DBE/WBE Program for Non-Federally Assisted Projects

(Page 7, Section II., “Disadvantaged/Women Business enterprise Program for Non-Federally assisted Projects”)

Proposes the creation of a new program element for large non-federal projects over \$1M

- Control and Flexibility given to DC Water
 - New Proposed Program will impact the largest number (and dollar value) of projects
 - 80 Construction and A/E projects are slated for FY 20 and FY 21 with EPA language
 - 5 Projects are actually eligible for EPA funding
- Allows DC Water to count District Based “Certified Business Enterprise” (CBE) participation on construction projects
- Follows established protocols
- Contractor familiarity
- Regulation structure is already in place (not reinventing the wheel)



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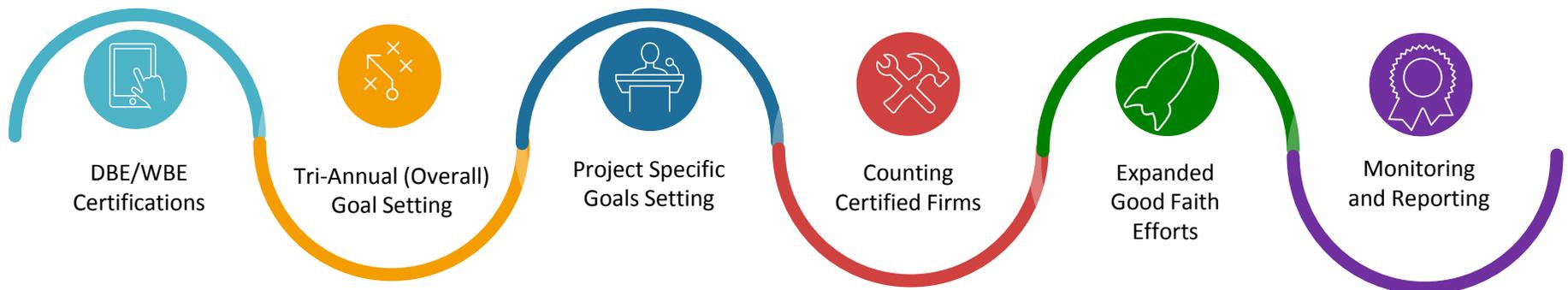
Business Development Plan Review

DBE/WBE Program for Non-Federally Assisted Projects

- New Program
 - Applicable to all non-federally assisted goods and services, construction and Architectural/Engineering (A/E) contracts over \$1 million.

(Page 7, Section II., “Disadvantaged/Women Business enterprise Program for Non-Federally Assisted Projects”)

Program Components:

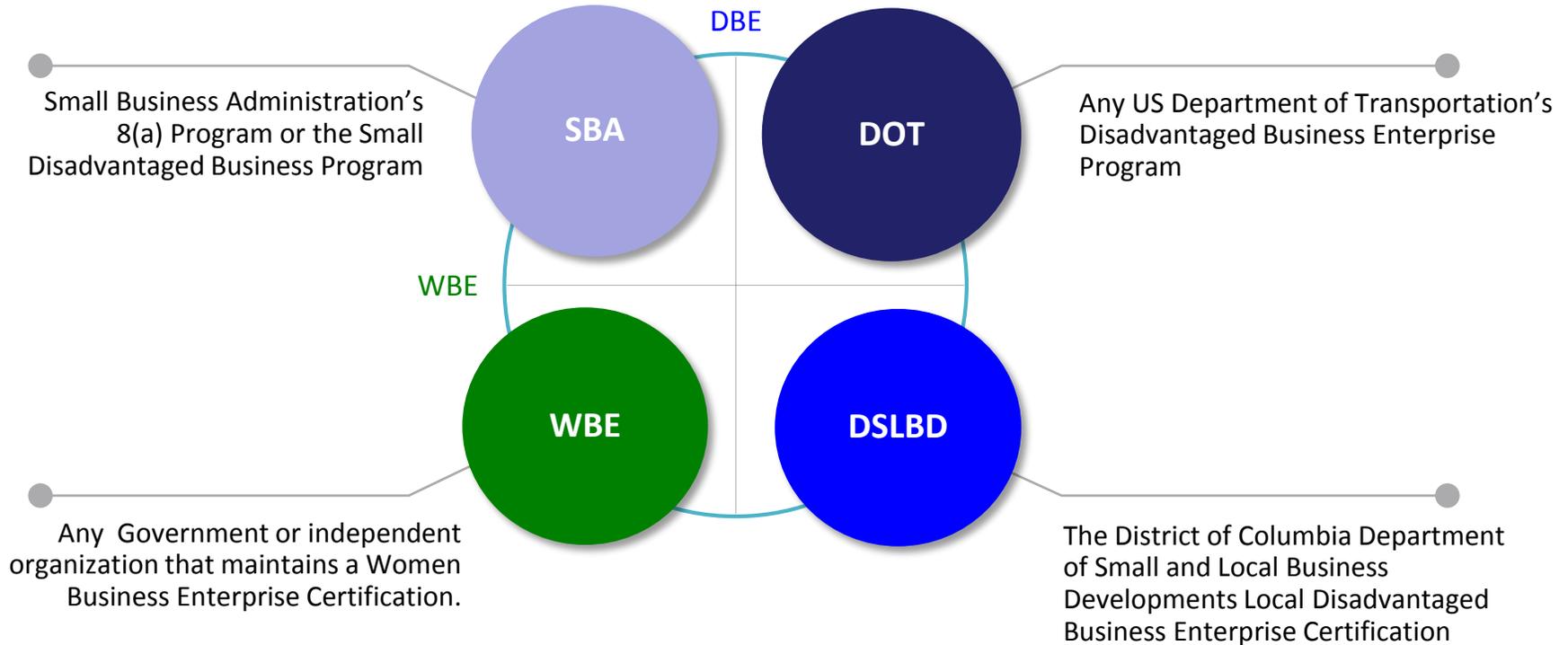




Business Development Plan Review

DBE/WBE Program for Non-Federally Assisted Projects

DBE/WBE Recognized Certifications (Page 7, Section II.C., “DBE/WBE Certification”)





Business Development Plan Review

DBE/WBE Program for Non-Federally Assisted Projects

Goal Setting Processes (Page 8, Sections II. D., “DBE/WBE Goals” and II. E., “Project Specific Goal Setting”)

Tri-Annual Goal Setting

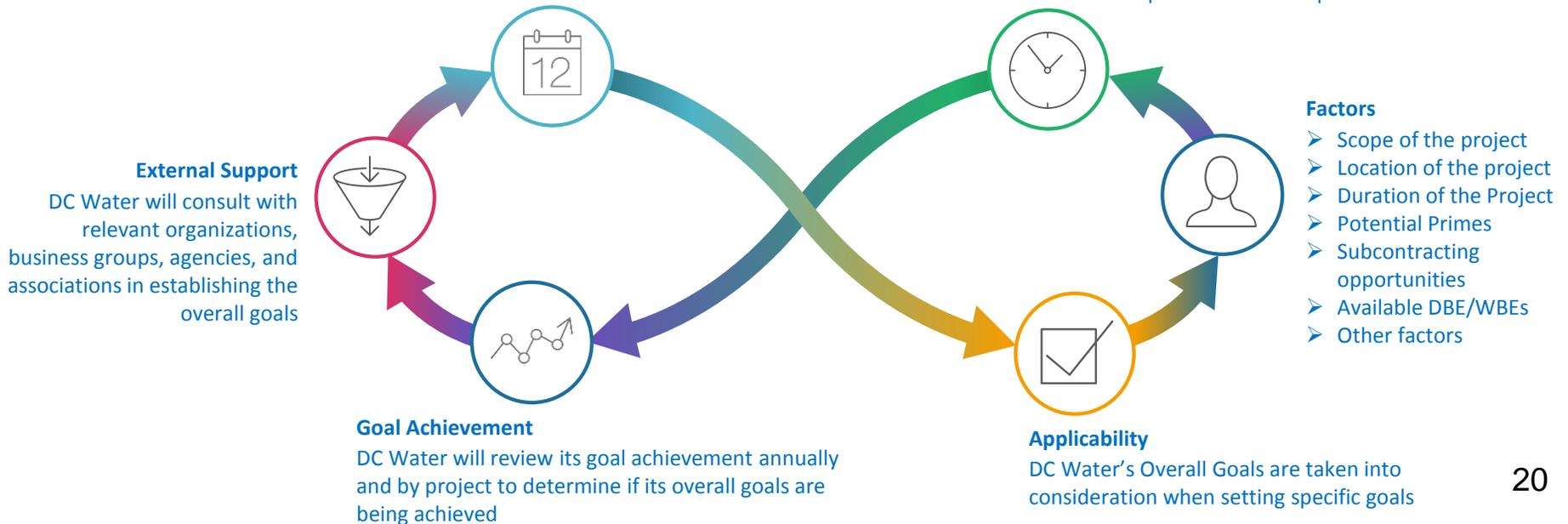
Overall DC Water Goals

Goals will be set by the Board of Directors in three year intervals by July 31st. Separate goals will be set for Construction, A/E, and Goods and Services

Project Specific Goal Setting

Project Specific Goals

Once set, the Project Specific Goals will be incorporated into the specific solicitation.





Business Development Plan Review

DBE/WBE Program for Non-Federally Assisted Projects

Counting DBE and WBE Participation (Page 9, Section II. F., “Counting DBE/WBE Participation”)

01



In order to be counted towards the DBE or WBE goals, a firm must have a recognized certification.

02



Participation will be counted for certified:

- Prime Contractors
- Subcontractors
- Joint Venture Partners
- Vendors
- Protégés (from a registered program)/

03



Certified firms must perform a “Commercially Useful Function” in order to be counted. Presumption is the certified firm will perform at least 50% of the cost of its own contract.

04



Goals are not quotas. Contractors cannot be penalized or treated as non-compliant simply for failing to achieve the goals – unless they did not act in good faith.



District of Columbia Water and Sewer Authority
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Business Development Plan Review

DBE/WBE Program for Non-Federally Assisted Projects

Good Faith Efforts (Page 9, Section II. H., “Good Faith Efforts”)

Bidders are to make good faith efforts to identify and subcontract portions of the non-federally assisted contract to DBE/WBEs. DC Water treats bidders'/offerors' compliance with good faith effort requirements as a matter of responsiveness. A responsive bid/proposal is meeting all the requirements of the advertisement and solicitation.

Each solicitation for which a project specific goal has been established will require the bidders/offerors to submit the following information:

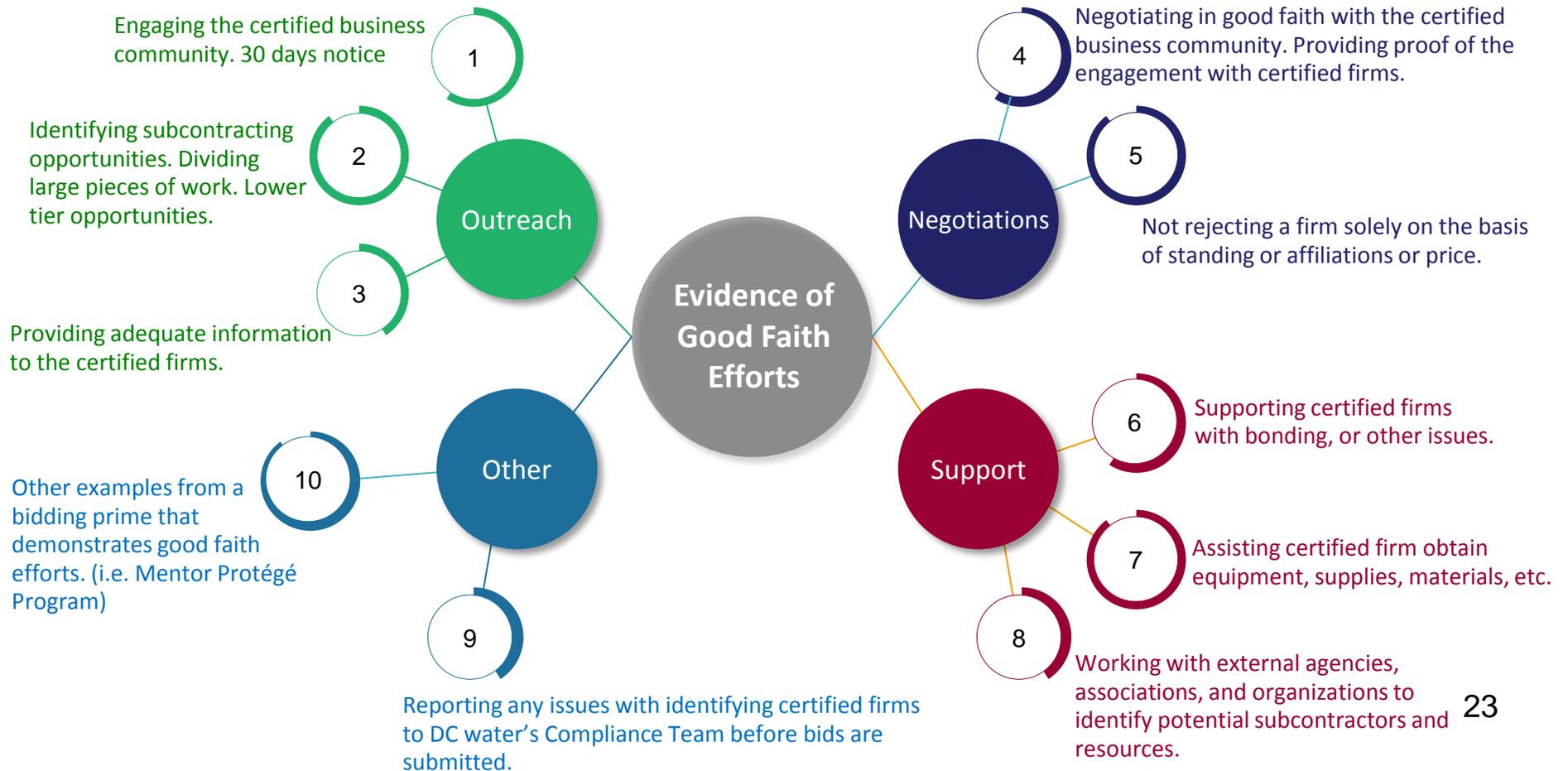
1. The names and addresses of known DBEs/WBEs that will participate in the contract;
2. A description of the work that each DBE/WBE will perform;
3. The contract value of each DBE/WBE;
4. Signed documentation of the Prime's intent to use the DBEs/WBEs identified to participate in the contract (with DBE/WBE confirmation);
5. Evidence of good faith efforts.



Business Development Plan Review

DBE/WBE Program for Non-Federally Assisted Projects

Evidence of Good Faith Efforts (Pages 10-12, Section II. I., "Evidence of Good Faith Efforts")





District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

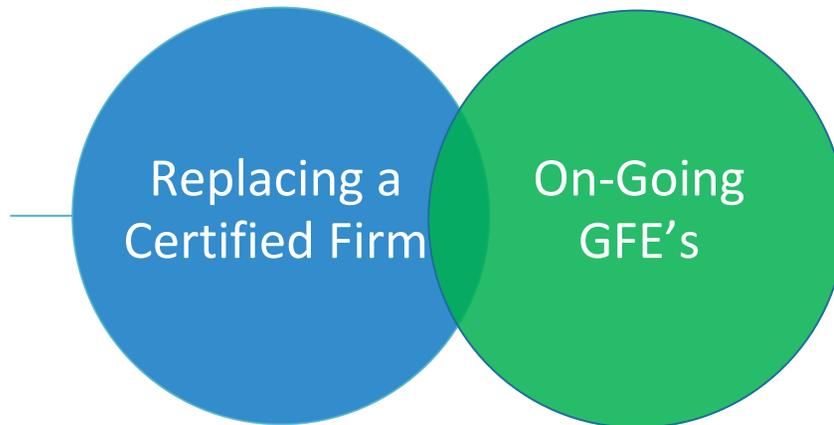
Business Development Plan Review

DBE/WBE Program for Non-Federally Assisted Projects

Substitution (Page 12, Section II. J., "Substitution")

Prime Contractors cannot terminate a DBE or WBE without good cause and the consent of DC Water

- Prior notice given to DC Water 10 days before termination.



Contractors must make good faith efforts to replace a DBE or WBE that is no longer on the project.



Business Development Plan Review

DBE/WBE Program for Non-Federally Assisted Projects

Monitoring and Reporting (Pages 12, Sections II. K., “Monitoring” and II. L., “Reporting”)





District of Columbia Water and Sewer Authority
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Outreach



Business Development Plan Review

DC Water Outreach Efforts

Outreach Efforts (Page 16, Section V., “DC Water Outreach Efforts”)

Program Component	Proposed Changes
Outreach	<p>Added new language:</p> <p>5) Procurement forecast data will be shared.</p> <p>d) External Conferences – DC Water may participate in procurement conferences or other related events sponsored by external organizations and agencies to describe DC Water’s Capital Improvement Program and history of LBEs, LSBEs, MBEs &WBEs participation.</p>



District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

CAPACITY BUILDING



Business Development Plan Review

Mentor Protégé Program

[Mentor Protégé Program \(Pages 17, Section VI. A., “Mentor-Protégé Program”\)](#)

New Program Component

DC Water’s proposed Mentor-Protégé guidelines are designed to enhance the engagement between primes and subs and create a new pathway for certified firms to participate and grow.

- Voluntary program
- Participation will count towards GFE’s
- Certified firm participation will count towards goals.

Goals of the Mentor-Protégé Program:

- Enhance the business skills of certified firms;
- Broaden the base of the certified firms’ design, engineering and construction activity;
- Build long-term stability of certified firms; and
- Assist in overcoming common barriers for certified firms, i.e., bonding.



Business Development Plan Review

Mentor Protégé Program

- DC Water
 - Program Administration
- Mentors
 - Prime Contractors
- Protégés
 - Certified DBE/WBE 's



Roles



General Guidelines

- Primes will develop specific programs for approval
- Mentors will find their Protégés
- Mentor Protégé programs are evidence of GFE's
- Programs should be for 2 years
- DC Water to monitor progress

- Submission of plan to DC Water. Plan should include:
- Identity of Protégé
 - Description of developmental program
 - Program Terms
 - Procedures of voluntary withdrawal.



Mentor-Protégé Process



Measurement of Success

- Success of the Mentor – Protégé Program is determined by the protégés:
- Capital Base
 - Bonding Limits
 - Value of current and future work
 - Staff Retention