



## Bexar County 2017 US DOT Bonding Education Program (BEP)

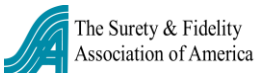


Presented by:

U.S. Department of Transportation (USDOT)

and Gulf Region Small Business Transportation Resource Center – a regional field office of the USDOT  
in partnership with the Surety and Fidelity Association of America (SFAA)

Bexar County SMWBE/DBE Program and The Associated General Contractors of Texas (AGC)



Hosted by:

*Bexar County Small Business and Entrepreneurship Department*



### Schedule of Business Seminars

#### April 4, 2017 (Week 1)

- 5:00-5:45 Welcome and Introductions  
 Bexar County SMWBE/DBE Program – FHWA  
 Renee Watson, DBE Liaison/SMWBE Program Manager  
 Dave Wegmann, Capital Projects Manager  
 AGC of Texas - Lee Taylor, Area Manager  
 AGC San Antonio Chapter - Doug McMurry, Executive Vice President  
 Hispanic Contractors Association de San Antonio - Dave Sanchez, Executive Director  
 TXDOT - Jose Castro, District DBE Coordinator  
 San Antonio International Airport DBE Program – FAA  
 Lisa Brice, Special Projects Manager, DBE Liaison Officer  
 City of San Antonio Capital Projects DBE Program – FHWA  
 Courtney McClure, DBE Coordinator  
 VIA Metropolitan Transit DBE Program – FTA  
 Edward Cruz, Administrator of Business Supplier/Diversity Compliance
- 5:45-6:45 Bonding Education Program Kick-Off and Orientation  
 U.S. Department of Transportation’s OSDBU SBTRC - Tony Arps  
 Surety and Fidelity Association of America - Jim Swindle  
 Construction Financial Management Association - Tim Geppert
- 6:45 – 7:00 Break
- 7:00 - 8:00 Contractors Questionnaire – Jim Swindle - Alamo Surety Bonds

**April 11, 2017** (Week 2)

5:00 pm One-on-One Appointments with Bond Producers  
6:00-7:00 Topic: Business Planning  
Bonding Programs, Banking and Financing for Contractors  
Business Credit: Dunn & Bradstreet / Construction Industry Profile  
Instructor: Tony Arps, SBTRC  
7:00 – 7:10 Break  
7:10- 8:00 Topic: Financing the Work  
Lenders Panel: Moderator - Anthony Ruiz, San Antonio District Director, SBA  
Broadway Bank - John Cruz  
Frost Bank - Glenn Thomas  
LiftFund - Jonathan Sarabia  
Bank of San Antonio - Mario Dominguez  
Q&A/Networking

**April 18, 2017** (Week 3)

5:00 pm One-on-One Appointments with Bond Producers  
6:00-7:15 Topic: Bonding & Insurance  
Instructor: Keith Rogers-Sr. Client Executive, Baldwin-Cox-Allen  
7:15-7:25 Break  
7:25- 8:00 Topic: Liens & Getting Paid  
Instructors: The Gardner Law Firm

**April 25, 2017** (Week 4)

5:00 pm One-on-One Appointments with Bond Producers  
6:00-7:15 Topic: Finding US DOT Work & Contracts – Prime/Sub/JV and DBE Rules  
Instructor: Carlton Cooper, TXDOT Office of Civil Rights  
7:15-7:25 Break  
7:25- 8:30 Topic: Panel of General Contractors:  
Moderator - Tony Arps, SBTRC  
Eric Hedlund, Senior Vice President, Texas District Manager, Sundt Construction  
Clint C Henson, Operations Manager - San Antonio, Jordan Foster Construction  
Duane Gatlin, South Texas Operations Manager, Flatiron Constructors, Inc.  
Mike Kaiman LEED® AP | VP and General Manager – South Texas, Turner  
Rita Philip, Corporate Business Diversity and Compliance, Zachry Construction  
Brian Freeman, Texas General Manager, Skanska USA Building Inc.

**May 2, 2017** (Week 5)

5:00 pm One-on-One Appointments with Bond Producers  
6:00-7:00 Topic: Construction Accounting  
Instructors: Tim Geppert, Aventine Hill CFOs and Daniel Koehl, RSM  
7:00-7:10 Break  
7:10- 8:00 Revenue Recognition Over/Under Billings  
Job Cost - Templates for homework assignment

**May 9, 2017 (Week 6)**

5:00 pm One-on-One Appointments with Bond Producers  
6:00-7:15 Topic: Construction Accounting II  
Job Cost - Review Homework Assignment  
Construction Financial Management  
Instructor: Bill Gellhausen CPA, MBA, CCIFP, AFSB  
Regional Surety Practice Leader, USI Southwest  
7:15-7:25 Break  
7:25- 8:30 What Your Surety Looks For, Key Ratios & other Factors

**May 16, 2017 (Week 7)**

5:00 pm One-on-One Appointments with Bond Producers  
6:00-7:15 Topic: Managing Growth – Why Some Contractors Succeed and Others Fail  
Instructors: Tony Arps, SBTRC  
Terri Williams, Director, UTSA PTAC  
7:15-7:25 Break (light dinner – self-serve)  
7:25- 8:00 BEP Workshops Graduation Ceremony, Presentation of Certificates of Workshop Completion,  
Photos  
  
All stakeholders invited

**Participating Bond Producers:**

Alamo Surety Bonds                      Baldwin-Cox Agency                      BDI Insurance                      Holt Insurance Agency

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