**EXAMPLE/ ILLUSTRATION OF A MENTOR-PROTÉGÉ PLAN**

*FOR PHASE III PROJECTS*

*For assistance in developing the Mentor-Protégé Plan, plan development guidelines and information are shown in red. The Plan outline was developed based on the guidelines and supporting documents published by IDOT. Please refer to the guidelines and procedures on IDOT’s website for the latest policy and procedures. Examples are shown in blue. The guidelines and examples should be deleted in the final version of the Mentor-Protégé Plan.*

**Prepared for:**

**Illinois Department of Transportation**

**Mentor Firm:** Prime Consultant

 Address 1

 Address 2

**Protégé Firm:** Subconsultant

 Address 1

 Address 2

**Project:** Name

Route

Location

County

Contract No.

PTB # / Item

This Mentor-Protégé Plan is designed to enhance the professional service capabilities of the Protégé firm, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, a certified Disadvantaged Business Enterprise, by participating in specific project tasks and business related activities with meaningful instruction and assistance from the Mentor firm, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Among the goals for the Protégé firm as a result of this agreement are a thorough understanding of IDOT’s policies and procedures to manage and execute Phase III work, an increase in the capacity to perform construction engineering services work, enhancement of professional relationships with IDOT and other consulting engineers, and becoming or remaining a self-sufficient, competitive, and profitable business.

* **INTRODUCTION**

Identify the Project and the Mentor and Protégé participants. In general, explain the objectives of the Mentor-Protégé Agreement (hereinafter referred to as “Agreement”) between both parties.

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* **AREAS OF ASSISTANCE**
1. Provide a brief history of Protégé’s past experience related to Phase III Engineering Services. Identify any previous working relationships between Mentor and Protégé.

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1. Describe specific goals and objectives that will be achieved as part of the Agreement.

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1. Specifically describe Areas of Assistance (i.e. Staff Development, Technical Development, Marketing, Business Development, etc.) that the Mentor will provide in order for the Protégé to meet the aforementioned goals and objectives.

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* **DUTIES AND RESPONSIBILITIES**
1. Describe general duties and responsibilities of the Mentor in order to assist the Protégé in accomplishing the aforementioned goals and objectives.

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1. Describe general duties and responsibilities of the Protégé in order to accomplish the aforementioned goals and objectives.

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* **SCHEDULE OF ASSISTANCE**
1. Provide itemized schedule of activities that the Mentor will provide to the Protégé (or each member of the Protégé) in order to accomplish the aforementioned goals and objectives.

**Part 1** (i.e. Skill Assessment)

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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**Part 2** (i.e. Shadowing/Exposure)

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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**Part 3** (i.e. Supervised Active Participation)

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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*(Phases and Items can be added or deleted as necessary)*

* **MEASURABLE BENCHMARKS**

By Activity, describe in tabular form measureable benchmarks that will be achieved for each activity completed. By activity, provide hours expended by both the Mentor and the Protégé.

 **Part I**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Activity** | **Mentor (Name) Responsibilities** | **Protégé (Name) Responsibilities** | **Benchmark** | **Mentor (Hours)** | **Protégé (Hours)** |
| *Assess Skills* | *Administer Skill Assessment Test* | *Complete Skill Assessment Test* | *Document Completed Skill Assessment Test* | *5* | *5* |
|  |  |  |  |  |  |
| *Total* |  |  |  |  |  |

 **Part 2**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Activity** | **Mentor (Name) Responsibilities** | **Protégé (Name) Responsibilities** | **Benchmark** | **Mentor (Hours)** | **Protégé (Hours)** |
| *Manage Field Staff* | *Coordinate and Assign Staff to Monitor Contractor Activities* | *Review Daily Schedule with Supervisor (i.e. Assistant Resident Engineer)* | *Gain Understanding of Interaction with Field Staff and How to Align Staff to Specific Activities* | *40* | *40* |
|  |  |  |  |  |  |
| *Total* |  |  |  |  |  |

**Part 3**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Activity** | **Mentor (Name) Responsibilities** | **Protégé (Name) Responsibilities** | **Benchmark** | **Mentor (Hours)** | **Protégé (Hours)** |
| *Manage Field Staff* | *Supervise Coordination and Assignment of Staff to Monitor Contractor Activities* | *Coordinate and Assign Staff to Monitor Contractor Activities* | *Successful Completion of 20 Daily Assignments* | *20* | *20* |
|  |  |  |  |  |  |
| *Total* |  |  |  |  |  |

**EVALUATION**

The Mentor and Protégé shall submit quarterly progress reports indicating the status of their progress toward each of the Plan’s stated tasks and goals. The reports will indicate the steps taken during the quarter to further the Plan. The quarterly reports are due to the IDOT’s project manager and to the Bureau of Design and Environment within 2 weeks of the end of each quarter. The end of quarters are the last day of March, June, September, and December.

The mentor and protégé will each prepare a Final Report and individual assessments outlining the achievements, areas of experience gained towards prequalification areas, successes, failures, observations and any future recommendations. The Department will evaluate the Mentor-Protégé collaboration using the following criteria:

* Satisfactory progress toward the stated goals of the Plan
* Improved competency of the Protégé in specific aspects of highway engineering
* Decreased reliance on the Mentor by the Protégé for technical knowledge, equipment, personnel
* And, increased numbers of projects in relation to number of advertised projects with consultants, other than the Mentor, and/or increased Statements of Interest submitted as a prime consultant.

The final report is due two weeks after submittal of the contractor’s final invoice. *The final report trigger date should be based on the mentor-protégé plan schedule of activities and duration.*

The reports shall be submitted to the IDOT project manager and to the Bureau of Design and Environment.

*The reports submitted by the Mentor shall list all tasks for which the Mentor has received (or applied for) DBE credit for using the Protégé as a DBE Sub-Consultant.*

* **DURATION**

*Specify in the Mentor-Protégé Plan the maximum time frame for which the Plan will remain in effect.*

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* **KEY PERSONNEL**

 The following are the key personnel relative to the Mentor-Protégé agreement:

*Identify the Mentor’s key personnel, including the experience of the key personnel responsible for training and coordinating the assistance provided to the Protégé.*

*The Mentor’s key personnel shall be involved in the initial assessment of the proposed activities the protégé will provide during the course of the project.*

*Key personnel are anticipated to remain involved throughout the project. This may be an evaluation criterion used to measure the success of the project.*

*Key personnel shall be identified on the SOI organization chart.*

* **WRITTEN AGREEMENTS**

 *List any agreements between Mentor and the Protégé including the Sub-Consultant Agreement.*

*Besides the subconsultant agreement there are no written agreements between (Mentor) and (Protégé).*

* **TERMINATION PROVISIONS**

 Mentor-Protégé relationship will be terminated by mutual consent or IDOT due to the following:

* The Protégé no longer meets the eligibility standard for certification as a DBE;
* Either party has failed or is unable to meet its obligations under the Development Plan;
* The Protégé is not progressing or is not likely to progress in accordance with the Plan;
* The Protégé has reached a satisfactory level of self-sufficiency to compete without utilizing the Mentor-Protégé Program;
* The Plan or provisions contained in it are contrary to the requirements of federal, state or local law or regulation; or,
* The relationship has continued for the life of the project.
* *Additional Items as agreed by Mentor and Protégé.*

**XI. REQUIREMENTS**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ will comply with all conditions

 Mentor Firm Protégé Firm

described above.

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 Signature For Mentor Firm Signature For Protégé Firm

**ATTACHMENTS**

*Include the following items as attachments to the Mentor-Protégé Plan.*

* Key Personnel Resumes
* Copies of all executed written Agreements, as applicable
* CECS Forms supporting Mentor-Protégé labor and direct costs