Community Benefits Agreement
Training for Construction Managers, Project Managers, and Resident Engineers
May 18, 2022

Please note that this training is being recorded through Microsoft Teams.
Agenda

- Presenter Introductions
- Community Benefits Agreement
- Resources & Contact
- Q & A
Presenters

Elaine Richardson
Director of Diversity & Equity
SANDAG

Erik Staples
Senior Administrative Analyst
SANDAG

Dan Sloan
Vice President, Labor Relations
Parsons Corporation
## Community Benefits Agreement Timeline

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 9, 2021</td>
<td>Board of Directors adopted a Resolution that directed staff to consider a “Project Labor Agreement (CBA)”</td>
</tr>
<tr>
<td>July 23, 2021</td>
<td>Board of Directors authorized staff to begin a CBA negotiation with the San Diego County Building and Construction Trades Council</td>
</tr>
<tr>
<td>December 17, 2021</td>
<td>SANDAG Board approved for SANDAG to execute the CBA</td>
</tr>
<tr>
<td>May 19, 2022</td>
<td>CBA becomes effective on all applicable construction projects</td>
</tr>
</tbody>
</table>

A CBA is also referred to as a Project Labor Agreement and focuses on more workforce equity components that create economic benefits for the community.
Community Benefits Agreement (CBA) Basics

- Collectively bargained labor agreement between SANDAG and the San Diego County Building and Construction Trades Council
- Effective May 19, 2022
- Open to both union contractors and contractors who are not otherwise signatory to a union.
- All State and Federally approved apprenticeship programs
CBA Basics
(continued)

Workforce Opportunities for Rising Careers

- Disadvantaged Worker and Targeted Worker employment goals
- Robust system for recruitment, training, employment and retention of Disadvantaged and Targeted Workers
- Partnership with pre-apprenticeship training programs
- Helmets to Hardhats and Veteran hiring
CBA Basics (continued)

- Additional flexibility for Disadvantaged Businesses regarding hiring and benefits contribution
- Supply of skilled and trained workers
- Project Labor Coordinator
CBA Basics (continued)

- Employee wage and benefits standardization
- Labor harmony with no work disruptions or stoppages because of labor disputes
- Efficient labor dispute resolution and grievance procedures
- Program-wide drug and alcohol testing policy
- Management rights and safety
- Joint committees for labor/management cooperation
• Covered Projects:
  • Construction project with an estimated contract award value of $5 million or greater with a bid advertisement date for the prime contract on or after May 19, 2022
  • Job Order Contracts, individual job order valued at $250,000 or greater and issued under a Master Job Order Contract with an award value of $5 million or greater
  • Professional services agreements for covered inspection and/or surveying services with a RFQ or RFP date on or after May 19, 2022
CBA Scope of the Agreement

• All subcontracts flowing from prime contract for a Covered Project (except for CBA exclusions)

• Onsite construction craft labor

• Building/Construction Inspector and Field Soils Material Testers and Surveyors are a covered craft under the CBA
CBA Scope of the Agreement
Inspectors and Surveyors

• Prevailing wage – covered Building/Construction Inspectors and Field Soils Material Testers and Surveyors are a covered craft under the CBA (e.g., Inspection Categories – Group 1, Group 2, Group 3)

• This type of work is covered by the CBA pursuant to any professional services agreement, a contract entered into directly with SANDAG, or a contract with a Contractor (but not SANDAG employees)

• Here is an example of the types of special inspection covered by the California prevailing wage determination for Building/Construction Inspector and Field Soils Material Testers:

<table>
<thead>
<tr>
<th>CLASSIFICATIONS:</th>
<th>GROUP 2 (CONT.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GROUP 1</td>
<td>Reinforced Concrete</td>
</tr>
<tr>
<td>Field Soils and Material Tester</td>
<td>Pre-Tension Concrete</td>
</tr>
<tr>
<td>Field Asphaltic Concrete (Soils and Material Tester)</td>
<td>Post-Tension Concrete</td>
</tr>
<tr>
<td>Field Earthwork (Grading Excavation and Filling)</td>
<td>Structural Steel and Welding Inspector</td>
</tr>
<tr>
<td>Roof Inspector</td>
<td>Glue-Lam and Truss Joints</td>
</tr>
<tr>
<td>Water Proofer</td>
<td>Truss-Type Joint Construction</td>
</tr>
<tr>
<td></td>
<td>Shear Wall and Floor Systems used as diaphragms</td>
</tr>
<tr>
<td></td>
<td>Concrete Batch Plant</td>
</tr>
<tr>
<td></td>
<td>Spray-Applied Fireproofing</td>
</tr>
<tr>
<td>GROUP 2</td>
<td>Structural Masonry</td>
</tr>
<tr>
<td>AWS-CWI Welding Inspector</td>
<td>GROUP 3 Nondestructive Testing (NDT)</td>
</tr>
<tr>
<td>Building/Construction Inspector</td>
<td>Reinforcing Steel</td>
</tr>
<tr>
<td>Licensed Grading Inspector</td>
<td></td>
</tr>
</tbody>
</table>
CBA Exclusions

- Non-manual employees
- Most offsite work, including deliveries and hauling to and from the site
- Employees of SANDAG
- SANDAG consultants not engaged in Project Work
- Work performed by State, county, city, or other governmental bodies, or their contractors, or by private utilities, or their contractors
- Work performed by employees of a manufacturer or vendor on the manufacturer’s or vendor’s equipment to maintain a warranty or guarantee
- Specialized or technical work requiring specialized training, unique skills, or a level of specific technical experience
All contractors and subcontractors of any tier performing CBA-covered work are bound to the CBA and must sign and submit a LOA.

Prime Contractors must sign the Letter of Assent prior to the execution of a Covered Contract.

No Contractor shall commence work without first providing a copy of the signed Letter of Assent to the Project Labor Coordinator.

Submission of signed Letter of Assent online via LCPTTracker.
Master Agreements are the local master labor agreements of the CBA-signatory unions

The CBA supersedes the Master Agreements

Provisions of the Master Agreements are only applicable when the subject is not otherwise covered by the CBA

Contractors may request a copy of the applicable Master Agreements from the involved local union(s)
CBA Union Participation or Subscription Agreements

- For non-union Contractors, the involved Union(s) may require a non-discriminatory Participation or Subscription Agreement to be signed at the request of the Union benefit trust funds.
- The Participation or Subscription Agreement cannot bind the Contractor beyond the terms and conditions of the CBA.
- Should reference the CBA and the applicable construction project(s).
- Contractors not obligated to sign any other local, area or national agreement as a condition of performing CBA-covered Project Work.
Poll Break

Question #1:
How do the contractors become bound by the CBA?

A. By joining the union
B. By signing a Letter of Assent
C. They are automatically bound by the CBA by working on a CBA covered project
D. When Elaine says so

Please answer the pop-up poll on your screen.
Question #1:
How do the contractors become bound by the CBA?

A. By joining the union
B. **By signing a Letter of Assent**
C. They are automatically bound by the CBA by working on a CBA covered project
D. When Elaine says so
Workforce Opportunities for Rising Careers (WORC)

- WORC is a SANDAG workforce development program that includes the following:
  
  | Pre-Apprenticeship |
  | Disadvantaged Workers |
  | Targeted Workers |
  | Disadvantaged Businesses |
  | Helmets to Hardhats |

- Supports disadvantaged and low-income workers to find quality and sustainable careers in construction
- Upholds the agency’s commitment to equity
Pre-Apprenticeship Program

• SANDAG is part of the San Diego region’s Apprenticeship Readiness Collaboration (ARC)
• Our partners include the following: San Diego Workforce Partnership, San Diego College of Continuing Education Foundation, and the San Diego County Building & Construction Trades Council
• Preparing underserved and underrepresented individuals for apprenticeships
• Completed four (4) successful graduating cohorts

As a recipient of SB1 funds, SANDAG is required to participate in, invest in, or partner with, new or existing pre-apprenticeship program.
Disadvantaged Workers Program

- Focuses on obtaining workers from low-income populations
- Contractor must meet the 30% Disadvantaged Worker program goal on covered projects
- Identifies workers by utilizing predetermined low-income zip code lists (locally and nationally)
- Option to establish a project radius for local and pre-approved federal contracts
- Includes Veterans residing anywhere and individuals from low-income zip codes
Targeted Workers Program

- Focuses on recruiting workers from vulnerable and underrepresented populations, including people of color and women
- Contractor must meet the 10% Targeted Workers program goal on covered projects
- Targeted Workers include individuals from any of the qualifying categories
- Increases job access for workers who face barriers to employment
- Includes Helmets to Hardhats program
Targeted Workers

- Veteran
- Apprentice with < 15% completion
- No High School Diploma/GED
- Homeless
- Former Foster Youth
- Custodial Single Parent
- Unemployed
- Recipient of Government Assistance
- At or below 100% of Federal Poverty Level
- Formerly Incarcerated
- Pre-Apprentice Graduate
Voluntary Targeted Worker Verification & Reporting

- Voluntary Targeted Worker survey form is distributed and collected by the Jobs Coordinator
- Gives workers the opportunity to voluntarily identify as one or more of the Targeted Worker categories and provide supporting documentation
- Once the Targeted Worker’s status is voluntarily verified, the Project Labor Coordinator will indicate the worker as a Targeted Worker in the LCPtracker online certified payroll system so that Targeted Worker participation can be monitored and reported

EXAMPLE
A Veteran working on a SANDAG project completes the voluntary Targeted Worker survey form and provides a copy of her or his DD-214 as proof of veteran status.

Once verified by the Project Labor Coordinator, that Veteran’s hours worked on the project will then be counted towards the 10% Targeted Worker hiring goal.
Helmets to Hardhats

- Veterans interested in careers in the construction industry
- Non-profit dedicated to helping military Veterans
- Resources for union apprenticeship programs, contractors and Veterans
- Database of Veterans interested in working on SANDAG projects

Quincy Lunford
Southwestern Regional Representative
qlundford@helmetstohardhats.org
323.428.1687
All Contractors are required to utilize the Workforce Dispatch Request Form when requesting craft labor from the appropriate union hiring halls.

- Disadvantaged Worker qualifying zip codes are listed.
- Allows for dispatch of next available qualified Disadvantaged Worker.
- Contractor sends the form to the Union hiring hall dispatch office to request workers as needed, along with any other dispatch documentation required by the individual union.
- Union completes the dispatch process and returns the completed form to the Contractor and SANDAG’s Project Labor Coordinator.
WORC Program Hiring Requirements

▪ May be difficult to assess liquidated damages due to the Contractor’s failure to comply with Disadvantage Worker and Targeted Worker goals

▪ Contractors shall owe liquidated damages in the amount $25 per Construction Work Hour by which the project is short of either of the specified goals

▪ Minimum withholding will be 2% of the total monthly progress payment

▪ Any withholding will be released by SANDAG upon the Contractor achieving the goals in their contract
Jobs Coordinator Program

• Contractor shall engage a Jobs Coordinator prior to bidding on a Covered Project

• A Jobs Coordinator is an independent third-party individual, entity, or employee with whom the Contractor enters into a contract or employs to facilitate the achievement of the hiring goals

• The Jobs Coordinator may be selected from the SANDAG Pre-Qualified Jobs Coordinators List
<table>
<thead>
<tr>
<th>Company/Organization Name</th>
<th>Main Contact</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
<th>Phone</th>
<th>Email</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Del Richardson &amp; Associates, Inc. (DRA)</td>
<td>Taurean Gordon</td>
<td>510 South La Brea Avenue</td>
<td>Inglewood</td>
<td>CA</td>
<td>90301</td>
<td>310.683.3310</td>
<td><a href="mailto:t.gordon@drainc.com">t.gordon@drainc.com</a></td>
<td><a href="http://www.drainc.com">www.drainc.com</a></td>
</tr>
<tr>
<td>Good For Others LLC</td>
<td>John Valencia</td>
<td>3536 Princeton Avenue</td>
<td>San Diego</td>
<td>CA</td>
<td>92117</td>
<td>619.507.4213</td>
<td><a href="mailto:john@goodforothers.org">john@goodforothers.org</a></td>
<td><a href="http://www.goodforothers.org">www.goodforothers.org</a></td>
</tr>
<tr>
<td>Harris &amp; Associates dba Harris Consulting Group</td>
<td>Teela Page</td>
<td>865 S. Figueroa St. Suite 2750</td>
<td>Los Angeles</td>
<td>CA</td>
<td>90017</td>
<td>213.489.9633</td>
<td><a href="mailto:teela@harrisconsultinggroup.net">teela@harrisconsultinggroup.net</a></td>
<td><a href="http://www.harrisconsultinggroup.net">www.harrisconsultinggroup.net</a></td>
</tr>
<tr>
<td>Modern Times, Inc.</td>
<td>Alison Feldman</td>
<td>1892 E. Altadena Dr.</td>
<td>Altadena</td>
<td>CA</td>
<td>91001</td>
<td>213.810.6101</td>
<td><a href="mailto:alison@moderntimesinc.com">alison@moderntimesinc.com</a></td>
<td><a href="http://www.moderntimesinc.com">www.moderntimesinc.com</a></td>
</tr>
<tr>
<td>Padilla &amp; Associates, Inc.</td>
<td>Patricia Padilla</td>
<td>211 E. City Place Drive</td>
<td>Santa Ana</td>
<td>CA</td>
<td>92705</td>
<td>714.568.0363</td>
<td><a href="mailto:ppadilla@padillainc.com">ppadilla@padillainc.com</a></td>
<td><a href="http://www.padillainc.com">www.padillainc.com</a></td>
</tr>
<tr>
<td>Playa Vista Job Opportunities and Business Services (PV Jobs)</td>
<td>Mary Taylor</td>
<td>4112 South Main Street</td>
<td>Los Angeles</td>
<td>CA</td>
<td>90037</td>
<td>323.497.5179</td>
<td><a href="mailto:mtaylor@pvjobs.org">mtaylor@pvjobs.org</a></td>
<td><a href="http://www.pvjobs.org">www.pvjobs.org</a></td>
</tr>
<tr>
<td>TransCal Services, LLC</td>
<td>Jeffery Henderson</td>
<td>6109 South Western Avenue, Suite 103</td>
<td>Los Angeles</td>
<td>CA</td>
<td>90047</td>
<td>818.419.2581</td>
<td><a href="mailto:jhenderson@transcalservices.com">jhenderson@transcalservices.com</a></td>
<td><a href="http://www.transcalservices.org">www.transcalservices.org</a></td>
</tr>
<tr>
<td>TSG Enterprises, Inc. dba The Solis Group</td>
<td>Gary A. Hamm</td>
<td>9815 Carroll Canyon Rd, Suite 200</td>
<td>San Diego</td>
<td>CA</td>
<td>92131</td>
<td>626.685.6989</td>
<td><a href="mailto:ghamm@thesolisgroup.com">ghamm@thesolisgroup.com</a></td>
<td><a href="http://www.thesolisgroup.com">www.thesolisgroup.com</a></td>
</tr>
</tbody>
</table>
• Targeted Worker utilization reports generated by SANDAG using LCPtracker
• Reports will be generated by SANDAG on the 15th of each month, or the next working day following the 15th of each month, for the prior month’s reporting period
• Project Labor Coordinator shall produce detailed bi-annual to measure the success of our WORC program components
• The Disadvantaged and Targeted Worker utilization reports will be based on certified payroll records received for work performed through the end of the reporting period
• Project Labor Coordinator will initiate any monthly withholding of progress payments, which will be released by SANDAG upon the contractor achieving the applicable percentage goals
Question #2:
What is the dollar amount threshold for the CBA to applicable?

A. $1 million  
B. $3 million  
C. $5 million  
D. $7 million
Poll Break

Question #2: What is the dollar amount threshold for the CBA to applicable?

A. $1 million

B. $3 million

C. $5 million

D. $7 million
Referral Procedures & Core Employees

- Contractors have the right to determine the competency of all employees, the number of employees required, and shall have the sole responsibility for selecting employees to be laid off.

- Contractor shall have the right to reject any applicant referred by a local union for any non-discriminatory reason.

- The core employee requirements are only applicable to contractors who are not otherwise directly signatory to a CBA-signatory union.

- Core Employees must be a Journeyperson or Apprentice and must appear on the contractor’s active payroll for at least sixty (60) out of the last one-hundred-twenty (120) working days prior to being designated as a Core Employee.
Contractors must require their Core Employees to register with the appropriate union and provide a list of its core employees to the Project Labor Coordinator and the Council prior to commencing work. Failure to submit the Core Employee list prior to work commencing will prohibit the Contractor from using any Core Employees for 30 calendar days after the list is provided. After submitting the Core Employee List, Contractors shall not make any changes or substitutions to the Core Employee list for the duration of the Covered Project.
Contractors not otherwise signatory to a CBA-signatory union must adhere to an alternating hiring procedure if they intend to employ Core Employees on a Covered Project.

Contractors employing more than fifty (50) craft workers at the same time in a specific trade on a Covered Project may hire an additional two (2) Core Employees.
Disadvantaged Businesses (DBs) are businesses that have been certified through certifying agencies as a Disadvantaged Business Enterprise, a Small Business, Disabled Veteran Business Enterprise.

- Exemption applies to DBs with a subcontract value of $500,000 or less, or 0.5% of the prime contract value, whichever is greater.
- The total value of all exemptions shall not exceed twenty (20) percent of the total contract.
- The Prime Contractor is responsible for tracking and reporting all DB exemptions using the applicable SANDAG form.
### Core Employee Flexibility for Qualifying DBs

<table>
<thead>
<tr>
<th>DB’s Core Employees Per Craft</th>
<th>Union Referral</th>
</tr>
</thead>
<tbody>
<tr>
<td>1&lt;sup&gt;st&lt;/sup&gt; Employee (core)</td>
<td>-</td>
</tr>
<tr>
<td>2&lt;sup&gt;nd&lt;/sup&gt; Employee (core)</td>
<td>-</td>
</tr>
<tr>
<td>3&lt;sup&gt;rd&lt;/sup&gt; Employee (core)</td>
<td>4&lt;sup&gt;th&lt;/sup&gt; Employee (union)</td>
</tr>
<tr>
<td>5&lt;sup&gt;th&lt;/sup&gt; Employee (core)</td>
<td>6&lt;sup&gt;th&lt;/sup&gt; Employee (union)</td>
</tr>
<tr>
<td>7&lt;sup&gt;th&lt;/sup&gt; Employee (core)</td>
<td>8&lt;sup&gt;th&lt;/sup&gt; and any additional referrals (union)</td>
</tr>
</tbody>
</table>
CBA Additional Referral Procedures

- If any Union is unable to refer workers meeting the specific classifications, including Disadvantaged Workers and Targeted Workers, requested by the Contractor within 48 hours then the contractor may hire additional Core Employees or applicants from other sources in order to meet the craft worker demands of the specific referral request.

- Employees are not required to become or remain union members as a condition of performing Covered Work under this Agreement.

- No discrimination and harassment.
Skilled and Trained Workforce

- Each contractor performing work on a Covered Project is required to use a skilled and trained workforce, as defined in Public Contract Code § 2602
- Unions and contractors shall utilize the CBA grievance procedures to resolve any disputes regarding skilled and trained workforce requirements
- To the extent permissible by law, contractors and SANDAG shall be relieved of reporting and enforcement obligations described in Public Contract Code § 2602 and 2603
All employees shall be classified in accordance with the work performed and paid the hourly rates for those classifications in compliance with the Applicable Prevailing Wage Laws.

The hourly benefit portion of the Applicable Prevailing Wage Determination must be paid to the appropriate Union employee benefit funds.

Typically, these benefit contributions are submitted monthly.

DB exemptions
### Example: CBA Employee Benefit Fund Contributions

**Localities:**
All localities within San Diego County

**Wages and Employer Payments: Engineering Construction**

<table>
<thead>
<tr>
<th>Classification (Journeyperson)</th>
<th>Basic Hourly Rate</th>
<th>Health and Welfare</th>
<th>Pension</th>
<th>Vacation and Holiday</th>
<th>Training</th>
<th>Other Payment</th>
<th>Hours</th>
<th>Total Hourly Rate</th>
<th>Daily Overtime Hourly Rate (1 1/2 X)</th>
<th>Saturday Overtime Hourly Rate (1 1/2 X)</th>
<th>Sunday Overtime Hourly Rate (2 X)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carpenter (Heavy and Highway Work)</td>
<td>$44.24</td>
<td>$8.00</td>
<td>$5.66</td>
<td>$7.16</td>
<td>$0.62</td>
<td>$2.43</td>
<td>8.0</td>
<td>$68.11</td>
<td>$90.23</td>
<td>$90.23</td>
<td>$112.35</td>
</tr>
<tr>
<td>Bridge Carpenter (Highway Work)</td>
<td>$44.37</td>
<td>$8.00</td>
<td>$5.66</td>
<td>$7.16</td>
<td>$0.62</td>
<td>$2.43</td>
<td>8.0</td>
<td>$68.24</td>
<td>$90.425</td>
<td>$90.425</td>
<td>$112.61</td>
</tr>
<tr>
<td>Millwright</td>
<td>$44.74</td>
<td>$8.00</td>
<td>$5.66</td>
<td>$7.16</td>
<td>$0.62</td>
<td>$2.63</td>
<td>8.0</td>
<td>$68.81</td>
<td>$91.18</td>
<td>$91.18</td>
<td>$113.55</td>
</tr>
<tr>
<td>Pile Driver d</td>
<td>$44.37</td>
<td>$8.00</td>
<td>$5.66</td>
<td>$7.16</td>
<td>$0.57</td>
<td>$2.48</td>
<td>8.0</td>
<td>$68.24</td>
<td>$90.425</td>
<td>$90.425</td>
<td>$112.61</td>
</tr>
</tbody>
</table>

*State of California Employer Benefit Payments (example)*
CBA Pre-Job Conferences

- Separate from a Pre-Construction meeting and facilitated by the Project Labor Coordinator
- Each contractor shall conduct a pre-job conference with the Unions not later than 10 calendar days prior to commencing work
- Pre-job conference is to determine craft worker needs, schedule of work for the contract and project work/owner rules, and all union work assignments shall be disclosed by the Contractor(s)
- Contractor(s) performing Project Work that was not previously discussed at the pre-job conference shall conduct a separate pre-job conference
- Any Union in disagreement with the proposed assignment shall notify the contractor of its position in writing within 5 calendar days thereafter
**TIPS TO AVOID COMMON MISTAKES**

<table>
<thead>
<tr>
<th>Contractor Jurisdictional Work Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>As required by CBA Article 8, Section A.1, the assignment of work will be solely the responsibility of the contractor performing the work involved; and such work assignments will be in accordance with the Plan for the Settlement of Jurisdictional Disputes in the Construction Industry (the &quot;Plan&quot;) or any successor plan.</td>
</tr>
<tr>
<td>All jurisdictional disputes on this project shall be settled in accordance with CBA Article 8</td>
</tr>
</tbody>
</table>

### Jurisdictional Work Assignments

<table>
<thead>
<tr>
<th>Contractor name</th>
<th>Scope of Work</th>
<th>Union OR Non-Union</th>
<th>DBE or Non-DBE</th>
<th>Union Work Assignment (Local #)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: XYZ Contractor</td>
<td>Sprocket Installation</td>
<td>Union</td>
<td>DBE</td>
<td>Sprocket Union 123</td>
</tr>
</tbody>
</table>

- All Contractors (which includes all tiers of subcontractors) must make their own assignment(s).
- Contractors should breakdown individual scope of work assignments in separate rows if they are going to work with multiple unions.
- All contractors, including all tiers of subcontractors must attend the pre-job conference.
- Ensure the union name and local number are listed, and that the union(s) are signatory to the CBA and cover the geographic area of the project location.
Each subcontractor performing covered work should provide a completed subcontractor CBA form to the Prime before the CBA Pre-Job conference.

The Prime will incorporate all subcontractor information to the CBA Pre Job Conference form.

All CBA subcontractor forms will be provided to the CBA team with the completed CBA Pre Job Conference form before the CBA Pre Job Conference is scheduled.
CBA Grievance Procedures

- Standardized labor dispute resolution procedures to resolve contractor, union, and employee grievances
- Union jurisdictional dispute resolution procedures, “The Plan”
- Process for resolving work stoppages and lockouts expedited arbitration and assessment of liquidated damages
<table>
<thead>
<tr>
<th>Document/Form</th>
<th>Due Date</th>
<th>Frequency</th>
<th>Submitted by</th>
<th>Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBA Pre-Job Conference Form (Prime)</td>
<td>Prior to Pre-Job</td>
<td>Update as needed</td>
<td>Prime Contractor</td>
<td>• CBA Article 8, Section 8.4 and Article 16, Section 16.1</td>
</tr>
<tr>
<td>CBA Pre-Job Conference Form (Subcontractor)</td>
<td>Prior to Pre-Job</td>
<td>Update as needed</td>
<td>Subcontractors</td>
<td>• CBA Article 8, Section 8.4 and Article 16, Section 16.1</td>
</tr>
<tr>
<td>Letter of Assent</td>
<td>Prior to Work Start</td>
<td>One Time</td>
<td>All Contractors</td>
<td>• As required by CBA Article 3, Section 3.3(b)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(All tiers)</td>
<td>• Copy uploaded to LCP Tracker</td>
</tr>
<tr>
<td>Contractor Core Workforce Form</td>
<td>Prior to Work Start</td>
<td>One Time</td>
<td>Non-Union</td>
<td>• As required by the CBA Article 4, Section 4.6 (d)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Contractors</td>
<td>• Copy uploaded to LCP Tracker</td>
</tr>
<tr>
<td>Workforce Dispatch Request Form &amp; Transmittal</td>
<td>As the need to request</td>
<td>As Needed</td>
<td>All Contractors</td>
<td>• As required by the CBA Article 4, Section 4.5</td>
</tr>
<tr>
<td>Confirmation</td>
<td>workers arises</td>
<td></td>
<td>(All tiers)</td>
<td>• Original submitted to applicable Union</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Copy uploaded to LCP Tracker</td>
</tr>
<tr>
<td>Targeted Worker Survey</td>
<td>When Work Starts</td>
<td>As Needed</td>
<td>Jobs Coordinator</td>
<td>• Used to identify Targeted Workers on the project</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Upload to LCP Tracker along with verification documents</td>
</tr>
<tr>
<td>Monthly Proof of Fringe Benefit Payments to Union</td>
<td>Monthly</td>
<td>Monthly</td>
<td>All Contractors</td>
<td>• As required by CBA Article 6, Section 6.2, Labor Code Section 1770 and CCR 16000</td>
</tr>
<tr>
<td>Trust Fund</td>
<td></td>
<td></td>
<td>(All tiers)</td>
<td>• Copy uploaded to LCP Tracker on a monthly basis</td>
</tr>
<tr>
<td>Disadvantaged Business Exemption Form</td>
<td>As the need to request</td>
<td>As Needed</td>
<td>Prime Contractor</td>
<td>• As required by the CBA Article 6, Section 6.2</td>
</tr>
<tr>
<td></td>
<td>exemptions arise</td>
<td></td>
<td></td>
<td>• Copy uploaded to LCP Tracker</td>
</tr>
<tr>
<td>Jobs Coordinator Performance Evaluation Form</td>
<td>At 50% project completion</td>
<td>Two Times</td>
<td>Prime Contractor</td>
<td>• Used to evaluate Jobs Coordinators project performance</td>
</tr>
<tr>
<td></td>
<td>and end of project</td>
<td></td>
<td></td>
<td>• Copy uploaded to LCP Tracker</td>
</tr>
</tbody>
</table>
Question #3:
What is the effective date of the SANDAG CBA?

A. January 19th (The day SANDAG signed the CBA)
B. April 1st
C. May 19th
D. June 1st
Question #3:
What is the effective date of the SANDAG CBA?

A. January 19th (The day SANDAG signed the CBA)
B. April 1st
C. May 19th
D. June 1st
CBA Compliance Summary for Contractors

Before Project Starts

- Read and understand the CBA and provide copies to subcontractors
- Sign and submit a Letter of Assent as soon as feasible and prior to commencing work. Prime Contractor shall sign LOA as a condition of award
- Develop a compliant Disadvantaged and Targeted Worker hiring strategy and prepare to comply with all aspects of the WORC Program Hiring requirements
- Determine union work assignment(s), which will be disclosed at the CBA Pre-Job Conference
- Confer with affected union(s) and sign the union’s subscription (AKA participation or project-specific trust agreement), if required
- Register “core employees” with appropriate union and follow proper hiring and referral procedures
- Complete and submit Core Employee List, if applicable
CBA Compliance Summary for Contractors

After Project Starts
• Make accurate employee benefit contributions to the appropriate union benefit funds on behalf of all employees performing Project Work
• Ensure compliance with the WORC Program requirements, including the 30% Disadvantaged and 10% Targeted Worker hiring requirements
• Use the Workforce Dispatch Request Form to request dispatch of all workers from the union hiring hall on the project and ensure copies are provide to the Project Labor Coordinator with all requested information
• Review Disadvantaged and Targeted Worker hiring reports and take corrective action as necessary
• Coordinate and communicate with the SANDAG Project Labor Coordinator team – we’re here to help!
Some Anticipated CBA Construction Projects

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Construction Estimate</th>
<th>Estimated IFB Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Border to Bayshore</td>
<td>$13.8 million</td>
<td>May-22</td>
</tr>
<tr>
<td>Otay Mesa East Port of Entry</td>
<td>$400-$500 million</td>
<td>TDB</td>
</tr>
<tr>
<td>Imperial Avenue Bikeway</td>
<td>$7.9 million</td>
<td>Aug-22</td>
</tr>
<tr>
<td>IRT: Phase 3 (Vista &amp; Oceanside) Segment 3B</td>
<td>$5 million</td>
<td>Aug-22</td>
</tr>
<tr>
<td>North Park Mid-City: Orange Segment</td>
<td>$6.4 million</td>
<td>Jan-23</td>
</tr>
<tr>
<td>North Park Mid-City: University Segment</td>
<td>$14.8 million</td>
<td>Jun-23</td>
</tr>
</tbody>
</table>
The project must be approved prior to Caltrans issuing an E-76.

Individual letters must be submitted for each CBA covered project, no blanket letter covering all projects.

Approval process can take up to 5 months.

Letter must include the following project information:

- Project name
- Federal Aid Project #
- PPNO
- Estimate
- Bid Advertisement Date
- CIP #
- Scope
Resources

Visit our website!

sandag.org/cba
For any questions about the SANDAG CBA, please contact:

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