



JOB ORDER CONFERENCE PRE-BID CONFERENCE Cal Poly Humboldt Bid Solicitation PW23 - JOC Thursday, November 9, 2023 10:00 AM



Agenda



- Introductions
- Overview
- Solicitation
- Contract Documents
- The Construction Task Catalog
- Adjustment Factors

- Factor risks
- Calculating your Bid
- The Bid Process
- JOC Process
- Bid Considerations
- Milestones
- Questions and answers







Attendance today is required to submit a bid. Please enter your name, company, and email address in the chat to document your attendance. Failure to do so may prevent your bid from being accepted.







Overview JOC is an indefinite delivery/indefinite quantity or Umbrella contract



Types of Projects



From one competitively bid and then awarded contract, you are able to complete an indefinite number of Job orders



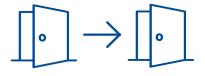
Remodeling



Repairs



Renovations



Replacement in-kind

Maintenance

A

Work



Time sensitive projects

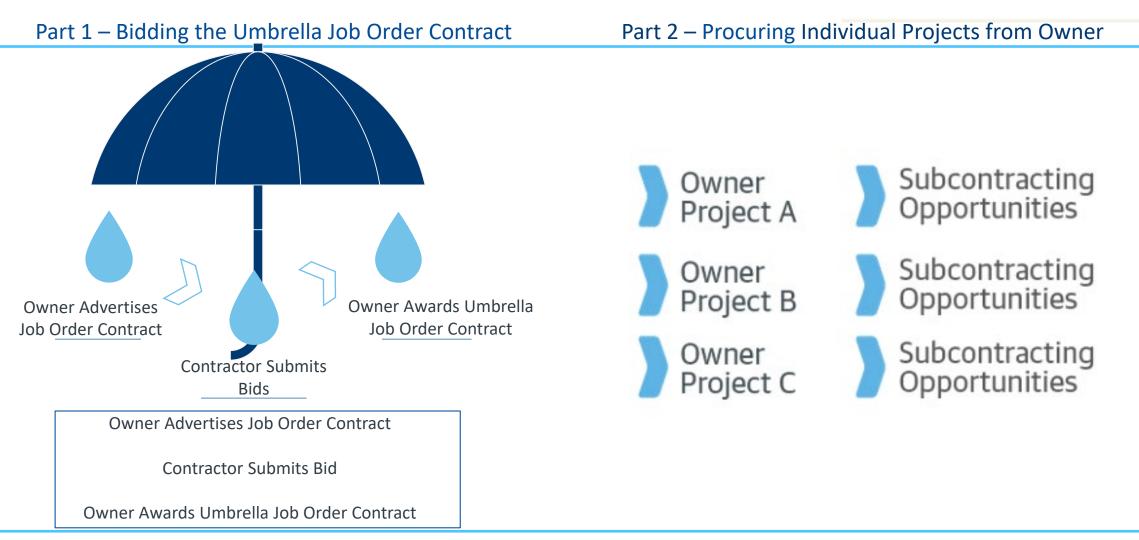


Alterations



Umbrella Contract





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JOC Benefits

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- Simplifies procurement
- Responsive contractors rewarded
- Improves the quality of work
- Increases local subcontractor participation
- Volume is driven by performance
- Collaborative by design

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- Reduces Risk & increases transparency
- A Fixed Priced, Fast Track Procurement Process, JOC allows for a higher percentage of job orders to be delivered on time and within budget

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History with CSU

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More than \$750M in job orders completed since 1999:

- Classroom and Lab remodels
- Hazmat abatement
- Dorm Upgrades
- Roofing
- Mechanical & HVAC
- Electrical & lighting
- Parking lot repaving
- Immediate Response





Contract Bid Documents

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- Front end documents
- Technical Specifications
- Construction Task Catalog[®]



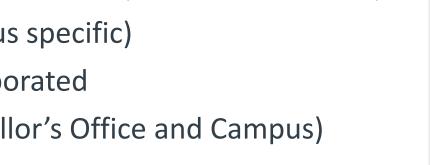


Special Condition CTC and Tach Space

- CTC and Tech Specs incorporated
- Pre-qualifications (Chancellor's Office and Campus)
- Sample Forms

Front End Documents

- Notice to Contractors
- Bid Form (Sample)
- General Conditions (Chancellor's Office)
- Supplementary General Conditions (Chancellor's Office)
- Special Conditions (Campus specific)



BID PROPOSAL FORM JOB ORDER CONTRACT, BID NUMBER 3863 California State University, Bakernfield 9001 Stockdale Hrvy Bakernfield, CA 93311
To the Trustees of the California State University, on behalf of the State of California (hereinafter called the Trustees):
The undersigned Bidder, who is familiar with the local conditions affecting the cost of the work and with the contract document, hereby propose, with the rates stated below, to provide and furnich all of the laber, mearstail, tools, equipment, expendible and otherwise, apparents, facilities, transportation, and permits, and to perform and complete in a workmanilize manner and within the specified time the work required, all in accordance with the contract documents and the Trustee' unit prices as a dynamics at factors are for the set of the set.
The Bidder understands that the Trustees reserve the right to reject any or all bids, to water minor irregularities in any bid, and to award the contract to the lowest responsible bidder.
BIDDER SHALL ACKNOWLEDGE EACH ADDENDUM RECEIVED ON THE LINE BELOW
The bid is subject to the provisions contained in the Contract General Conditions (note espectate Article 100 et seq. regarding instructions to bidden), and the bidder agrees that failure to during with the conditional basis of the regenera of this bid.
The bid must be submitted on this Proposal Form, complete finited out as in a sealed samplepe provided by the Trutenes, and delivered to the Procentement Office (Fuel 100) at the A combinatron 0 was Hollings #03 of Childron's State University, Bakersfield before 3:00 p.m. on Wednesder, Vane 3, 2:00 or it will be deregarded. The Trutees will only accept bids from prequalified commons with a durant buffers distance license Board-issued type B license and current California Department of Housers 12-bids ("Dollar Win Registration number."
Notice: The attention of bidders is particularly called to the fact that unless the bid is made in strict conformity with the directions given, it will be considered informal and may be rejected
Schedule of Prices The undersigned agrees to perform all work required, necessary, proper for, or incidental to completing the work called for an each individual job order used ware time. (a) Order Common resing the Construction Task Cotalog and Technical Specifications incorporated herein with the following ad instmered factors:
Normal Working Hours Undersigned shall perform any or all functions chied for during normal working hours in the quantities specified in individual job orders against the contrast for the performed price sum specified in the Construction Task Catalog multiplied by the adjustment Activation (Construction Construction Construction (Construction Construction Constr
Other Than Normal Working Hours
Under Start Norman, word in American Carlos and Start
NOTE - NO FACTOR MAY BE LESS THAN THE NORMAL WORKING HOURS ADJUSTMENT FACTOR.
Premium Working Hours Undersigned shall perform any or all functions called for during premium working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Cratals granulpiled by the adjustment factor of
(Specify to four (4) decimal places)
NOTE - NO FACTOR MAY BE LESS THAN THE NORMAL WORKING HOURS ADJUSTMENT FACTOR.



General Conditions

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- Bid requirements
- Award and Execution Process
- Conduct of Work
- Scope and Procedure for Job Order Work
- Interpretation of and Adherence to Contract Requirements
- Changes in the Work
- Claims and Damages
- Payment and Closeout





JOC Technical Specifications Humboldt.

- Specifies Quality of Materials and Workmanship
- Corresponds with Tasks in the Construction Task Catalog[®]
- Order of Precedence
 - Campus Specifications
 - A/E Specifications
 - JOC Technical Specifications





Construction Task Catalog® Humboldt.

- Catalog of more than 280,000 Pre-Priced Construction Tasks
- Organized by Construction Specifications Institute (CSI)
- Based on Local Labor, Material & Equipment Costs within a <u>15-25</u> <u>mile</u> radius of campus
- The tasks represent the "Scope of Work" for the umbrella contract on which you are bidding
- Current Prevailing Wage rates apply
- Direct cost of construction *only*



Construction Task Catalog®



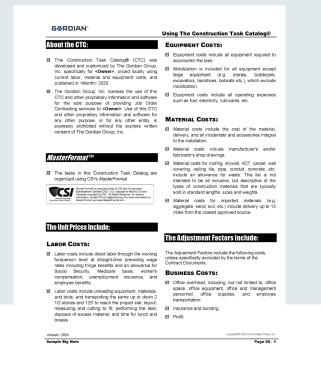
	Exterior In	nprovements	32
	Bases, Ballas	sts, And Paving Unit Paving	32 10 S 32 14
MINOR CSI UOM DESCRI	PTION	TOTAL DIRECT UNIT COST	DEMOLITION UNIT COST
32 16 13 Curbs And Note: Includes to section 02 41 19 32 16 13 13 Cast-In Note: Includes Section 02 41 19 32 16 13 13 Cast-In Note: Includes 32 16 13 13-0001 Co Not 32 16 13 13-0002 LF 32 16 13 13-0002 LF 32 16 13 13-0002 LF 6" For Up To For >50 T 32 16 13 13-0003 LF 32 16 13 13-0003 LF 6" For Up To For >20 T 50 T For Up To For >20 T 50 T For Up To For >20 T	Add 5 fo, Add 6 100, Add To 1,000, Deduct 7, Deduct X 12" Cast In Place Concrete Curb - Radius 20, Add 5 fo, Add 5 fo, Add To 1,000, Deduct	0'. See CSI	Demolition price



Understanding the Construction Cost Catalog®

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- Is a CONTRACT DOCUMENT
- Contractor must review and understand "Using the Construction Task Catalog[®]"
- Rules of the game
- Make sure you get paid for all appropriate tasks
- Pages 00–1 to 00-6 of the CTC
- See the link to the landing page below for more details
 - <u>CSU JOC Landing Page</u>





Understanding the Construction Cost Catalog[®]



General Rules:

- Unit Prices are for Complete and In-Place Construction
- Unit Prices Include Labor, Material and Equipment. Do Not Add Labor to Repointing Task.
- Unit Prices Include the Cost of Delivery to Project Site, Unloading, Storage and Handling. Delivery Height is up to 2 ½ Stories ,and Distance is 150' from lay down.
- Unit Prices Include Testing, Calibration, and Balancing, etc. of all new work .
- Unit Prices Include all Fasteners, Bolts, Anchors, Adhesives etc., for almost all new work.
- Tasks to install Windows, Doors, Frames, Countertops Etc. all include sealant and caulk so they cannot be added to a proposal where they have already been considered



Understanding the Construction Cost Catalog[®]



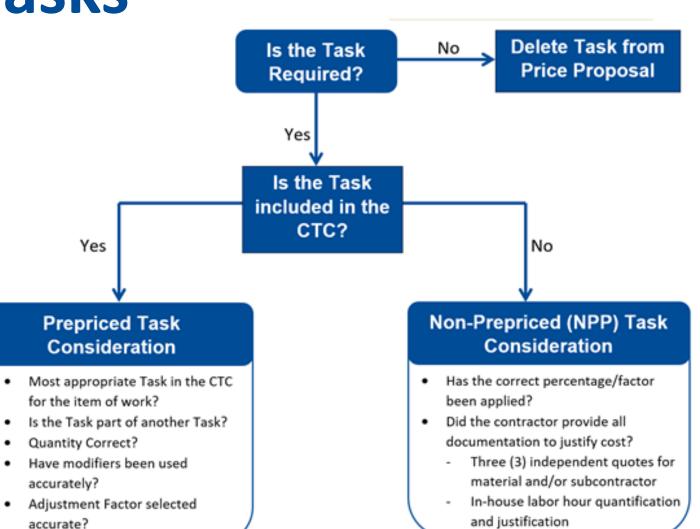
Contractors Never Get Paid Separately For:

- Moving and Returning Furniture Occupying Less than 55% of Floor Area. For Example, Moving Classroom Furniture to Paint
- Labor for Protecting Work in Place. For Example, a Laborer to Stay After a Concrete Pour
- Minor Barricades and Signage. Jobsite posters, non-working staff.
- Portable Toilets, Field Office, Field Office Equipment for Contractor's Use
- Layout, Site Engineering for the Work Itself, daily clean up or final cleaning.



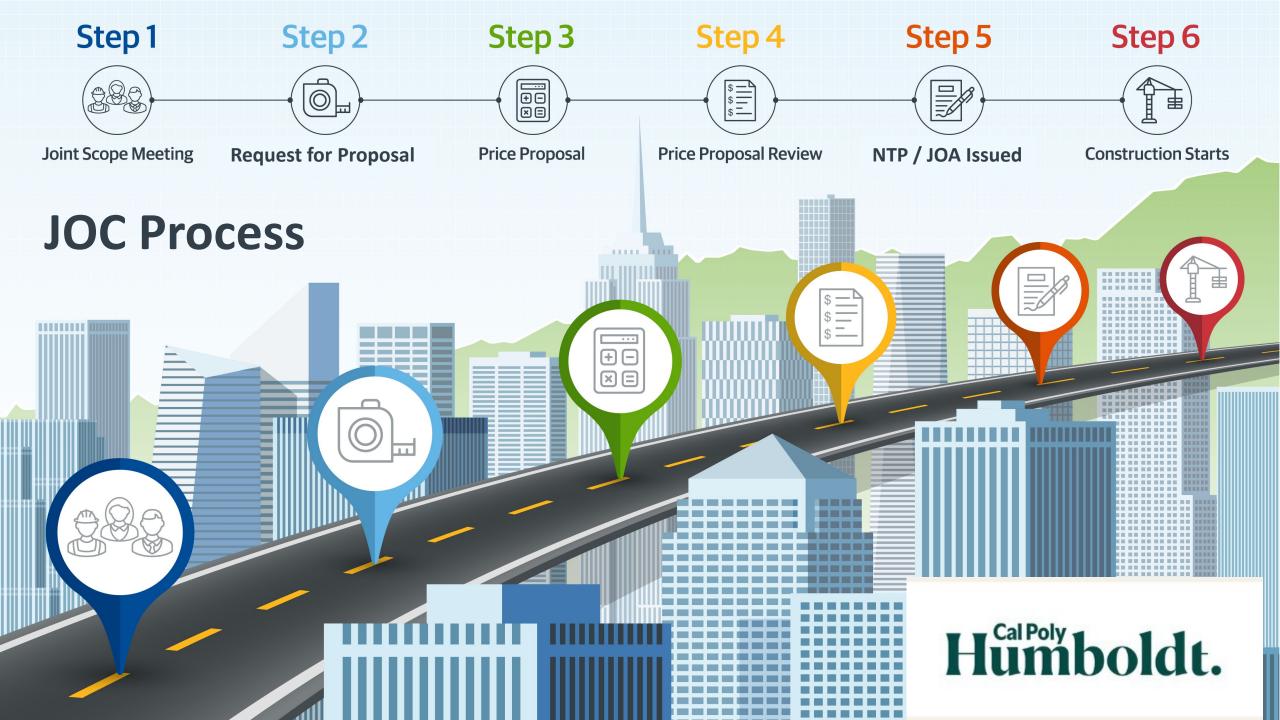
Non Pre-Priced Tasks

- Contractor must have permission from the University to use a Non Pre-Priced Task prior to submission
- Three (3) Quotes on vendors' or subcontractors' letterhead
- Justification for less than three (3) Quotes
- Contractors mark-up is a set NPP Factor. Normal working hours times 1. 15% with a maximum factor of 1.1500.



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Detailed Scope of Work



- This documents a thorough account of activities the contractor must perform to complete the job.
 - Collaborative document between owner and contractor
 - Defines the project's scale, location, and description
 - Details out items such as paint color, types of materials, strength of concrete required, etc.
- An agreed upon Scope of Work is **very** important! This is a prime opportunity for the contractor and campus to dissect the project into smaller details and produce an agreed scope of work to be used to build an accurate price proposal.



Contractor Adjustment Factor

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Importance of Adjustment Factors

- Determines Lowest Bidder AND
- Used to Price Every Individual Work Order
- Price Proposal Total Becomes the total Job Order Price
- DO this several times to refine your factors.

Unit Price	X	Quantity	X	Adjustment Factor	=	Total for Task
Unit Price	x	Quantity	X	Adjustment Factor	=	Total for Task
+ Unit Price	X	Quantity	x	Adjustment Factor	=	Total for Task

Total Job Order Price



Adjustment Factors



- Your Adjustment Factors must include (but not limited to):
 - All overhead, profit and taxes for the contractor and subcontractor
 - All Prep and modifications of proposals
 - Office trailers and portable toilets
 - Construction vehicles and storage devices
 - All PPE
 - Daily and final clean-up
 - Protection of all surfaces
 - Mandatory site supervision and management meetings
 - All osha required job site postings and safety precautions

Please review Understanding the Construction Cost Catalog[®] for comprehensive listing



Risks of Low Adjustment Factor

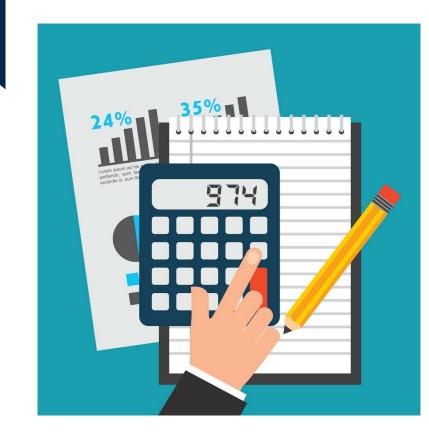


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- Leads to Arguments in Proposal Review
 - Unsupportable Tasks
 - Exaggerated Quantities
- Leads to Delays in Work Order Development
 - Takes Longer to Review Proposals
- Creates an Adversarial Relationship
 - Reduced Volume of Work
 - Will Shorten Contract/ Leads to Cancellation
 - Lost Profitability and Reputation
- No Second Chance to Improve your Margin



Method to Calculate Factors



- 1. Use Historical Project Data
- 2. Select a Completed Project You Know Scope and Direct Costs

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- 3. Price Project From CTC
- 4. Add on Overhead and Profit
- 5. Calculate the Adjustment Factors



Proposal Building Example Project

- Select multiple projects that you are familiar with based on your trade
 - Doors and Hardware
 - Interior Lighting
 - Plumbing Fixtures
 - Replace Boiler
 - Include any exclusions
 - Normal Working Hours Apply

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Sample Price Costs: CTC vs. Historical Cost



Direct Cost of Work from Quotes or Estimates Based on Your Trade, vs Tasking from the CTC

CTC

- Replace Boiler \$33,055.73
- Doors/Hardware \$ 8,282.09
- Lighting \$ 13,119.77
- Plumbing \$11,886.53

Your costs

Replace Boiler \$34,500.00
Doors/Hardware \$7,250.00
Lighting \$12,750.00
Plumbing \$10,500.00

TOTAL = \$ 66,344.12

TOTAL = \$65,000.00



Sample Price Costs: Putting it all together



- \$65,000.00 Direct Cost of Work from Quotes • A. \$ 6,500.00
- Overhead 10%* • B.
- Subtotal (Cost & O/H) \$71,500.00 • C.
- D. Profit 10%* \$ 7,150.00 •
- Subtotal (Cost & O/H & Profit) \$78,650.00 • E.
- Price From CTC \$66,344.12 • F.
- Adjustment Factor (= E / F) = 1.1855

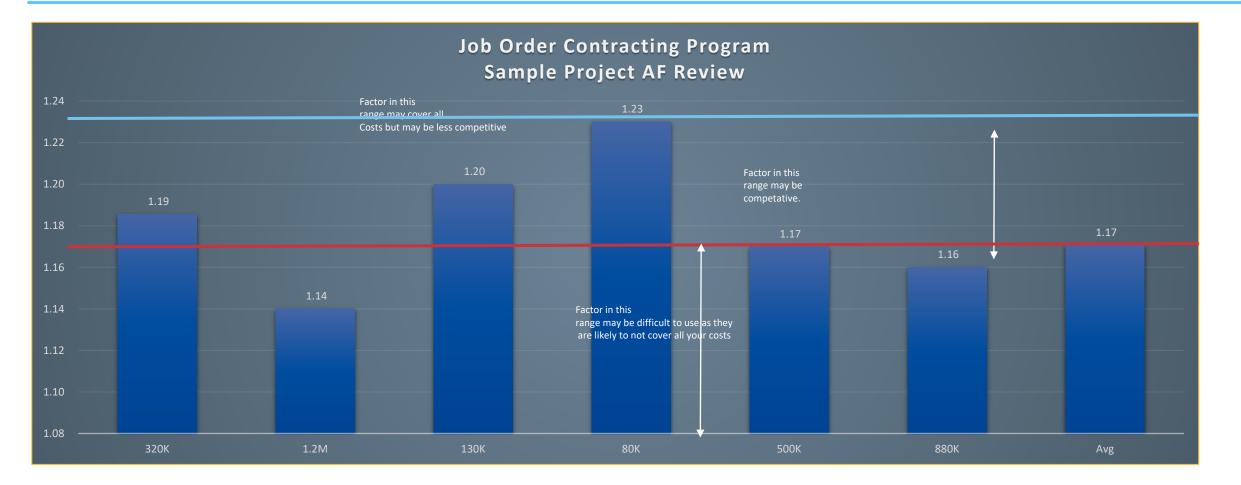
*Sample Only. Contractor to determine O/H & Profit. Prepare this calculation for more than one sample project.



Sample Price: Putting it all together

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Bidding Process



- Award Based on Competitive Bid
 - Must Bid 3 Adjustment Factors:

Normal Working Hours: 7:00 am to 5:00 pm Monday to Friday, except Holidays Other Than Normal Working Hours: 5:00 pm to 7:00 am Monday through Saturday Premium Working Hours: Sundays and Holidays

- Adjustment Factors Apply to All Tasks in the CTC and any NPP's for the duration of the contract.
- Each Adjustment Factor is Weighted to Create an Award Criteria Figure
- Lowest composite score from a Responsive, Responsible Bidder is Determined to be the Lowest bidder









Nothing written in this presentation supersedes what is provided in your bid package. Any deviations or changes to the bid documents will be provided in the form of an addendum.



Filling Out the Bid Form

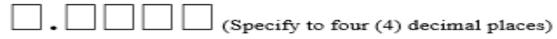
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Schedule of Prices

The undersigned agrees to perform all work required, necessary, proper for, or incidental to completing the work called for in each individual job order issued under this Job Order Contract using the Construction Task Catalog and Technical Specifications incorporated herein with the following adjustment factors:

Normal Working Hours

Undersigned shall perform any or all functions called for during normal working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by the adjustment factor of:



Other Than Normal Working Hours

Undersigned shall perform any or all functions called for during other than normal working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by the adjustment factor of:



(Specify to four (4) decimal places)

NOTE - NO FACTOR MAY BE LESS THAN THE NORMAL WORKING HOURS ADJUSTMENT FACTOR.

Premium Working Hours

Undersigned shall perform any or all functions called for during premium working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by the adjustment factor of:



(Specify to four (4) decimal places)

NOTE - NO FACTOR MAY BE LESS THAN THE NORMAL WORKING HOURS ADJUSTMENT FACTOR.



Filling Out the Bid Form

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BASIS OF CONTRACT AWARD: The award formula below is an integral part of this proposal, and to be responsive, the bidder shall quote for the total works above, and shall also complete the award formula below.

AWARD FORMULA

	Line 1.	Normal working hours Adjustment Factor	1.	<u>1.2034</u>
		Line 2. Multiply Line 1 by (80) %	2.	<u>0.9627</u>
	Line 3.	Other than normal working hours Adjustment Factor	3.	<u>1.2500</u>
		Line 4. Multiply Line 3 by (15) %	4.	<u>0.1875</u>
	Line 5.	Premium working hours Adjustment Factor	5.	<u>1.2900</u>
		Line 6. Multiply Line 5 by (5) %	6.	<u>0.0645</u>
	Line 7.	Add Lines 2 and 4 and 6		
	(This is th	he weighted, composite bid for this contract.)	7.	<u>1.2147</u>
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Bids Package Requirements Humboldt.

- After successful pre-qualifications you will complete and submit the following as your Bid:
 - **Bid Proposal Form** 1.
 - Bidders Bond / Security 2.
 - Certification of DIR registration 3.
 - Certificate of Appropriate Licenses and California Co. 4.
 - 5. Affidavit of Joint Venture
 - DVBE /Small Business Preference incentives & Certification (If applicable.) 6.
 - Non-Collusion Affidavit 7.
 - Bid Proposal Form Signature Page 8.





- Prior to Bidding the CSU Cannot:
 - Identify or Commit to any Specific Project or Location
 - Identify or Commit to any Specific CTC Tasks or Quantities
- 2 Contracts to be Awarded.

Contract	Contract Type	Maximum Contract Duration	Minimum Contract Value	Initial Maximum Contract Value	Initial Payment & Performance Bonding (Each)	Bid Security
PW23-JOC	General Construction, B	1 year	\$0	\$1,000,000	\$1,000,000	\$25,000





• SB/DVBE Brief Overview (continued)

- DVBE Mandatory 3% participation for Disabled Veteran Business Enterprises (SGC Article 2.12 and CGC Article 5.05-E)
 - Required documentation: DVBE Compliance Form (DVBE-C), DVBE Transmittal Form, (Attachment 1), Bidder's Certification (Attachment 2), DVBE Declaration STD 843
- DVBE Bid Incentive
 - CGC Article 2.12
 - Exceed 3% DVBE participation requirement
- <u>https://caleprocure.ca.gov/pages/PublicSearch/supplier-search.aspx</u>
- DVBE certification

DVBE Participation	Incentive
3.00% to 3.99%	None
4.00% to 4.99%	1%
5.00% to 5.99%	2%
6% or more	3%



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- Differing Site Conditions or Changes in Scope
 - Priced from Construction Task Catalog[®]
 - Supplemental Job Order
 - No Negotiated Change Orders
- Filings and Permits
 - Fees paid for all Permits reimbursed 100% No Markup
- Liquidated Damages
 - On a Job Order by Job Order basis
 - Sliding Scale Based on Job Order Value
- SBE 5% Bid Advantage (Review requirements in the General Conditions)
- DVBE 3 %Bid incentive (Review requirements in the General Conditions)
- DVBE Participation Requirement of 3% for all awardees on all contracts
- Bid Security: \$25,000



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Internet Based Software Provided with Contract

- Software Training Expedites the Job Order Process in GordianCloud
 - Price Proposal building and review
 - Ongoing training as needed for new hires
 - Troubleshooting
 - Subcontractor tracking

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(7) Dashboard	Acti	ve Contract	s .		
Scontracts		NUMBER	NAME	DEPARTMENT	GROUP
Projects	>	2-16-DNM-011	Maintentance Contract for Schools	Facilities	Organizational D Consultant, Prod
Directory	>	DNM-2016- C001	Facilities Maintenance Contract - County Administrative Offices	Facilities	Organizational E Consultant
		DNM-2016- AEC002	Design Services for County Administrative Offices	Procurement	Organizational D Consultant,Proc
C Settings					

Prequalifications



Each interested contractor, must comply with bidding provisions of Article 2.00 et seq. in the Contract General Conditions, and should be familiar with all the provisions of the Contract General Conditions, Supplementary Conditions, and Special Conditions, especially Article 2.02, regarding the necessity to prequalify with the Trustees ten (10) business days prior to the bid date. Two prequalification's are required to submit a bid.

Financial "Systemwide" Pre-qualification and Supplemental Pre-qualification submissions due: Not later than Monday, November 13th, 2023 by 5:00 P.M.

Bidders must be prequalified with the Trustees. Contractors shall register and log in to "PlanetBids" to apply for prequalification at

http://www.calstate.edu/cpdc/cm/contractor_prequal_bidders.shtml.

In addition to the Systemwide Prequalification, prospective bidders must also receive and complete a **Supplementary Prequalification** which is provided upon request to the campus by sending an email to:

Addie E Dunaway <Addie.Dunaway@humboldt.edu>

Interested Bidders must complete and submit the Supplementary Prequalification Form via email to:

cocm.prequal@calstate.edu

Once a Prospective Bidder is prequalified, they shall submit both a copy of their CSU Systemwide prequalification receipt and Supplementary Prequalification receipt to receive a bid package.



Bid Opening



Submitting a Bid Package:

• The Trustees of the California State University will receive sealed bid proposals from pre-qualified Contractors via email to <u>Addie.Dunaway@humboldt.edu</u>,

Until Wednesday,November 29th, 2023, at 3:00pm. Any proposal(s) received after 3:00 pm will be rejected)

Bid Opening:

- The bid opening meeting will be held via ZOOM. It is the bidder's responsibility to advise of your desire to attend the bid opening zoom conference by emailing: <u>Addie.Dunaway@humboldt.edu</u> to request an invitation.
- A Zoom invitation will be sent to the bidders upon receipt of proof of their physical bid submission.



Due Dates and Questions



- All questions concerning this solicitation must be received via email no later than:
 - Tuesday, November 14th, 2023, by 5:00 P.M.
- Submit questions to: Addie E Dunaway Addie.Dunaway@humboldt.edu
- <u>Systemwide Financial Prequalification Forms and Supplemental</u> <u>Prequalification Forms due not later than:</u>
 - Monday, November 13^{th,} 2023, by 5:00 P.M.
- Bids are due by

• Wednesday, November 29th, 2023 at 3:00pm

