

JOB ORDER CONTRACTING

PRE-BID CONFERENCE
Cal Poly Humboldt

Bid Solicitation PW22-1
08/29/2022



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 in order to receive credit for attending
Failure to do so will 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



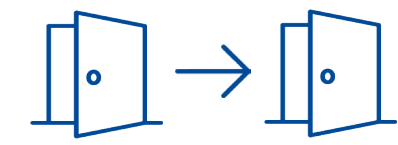
Remodeling



Repairs



Renovations



Replacement
in-kind



Maintenance



Emergency
Work



Time sensitive
projects



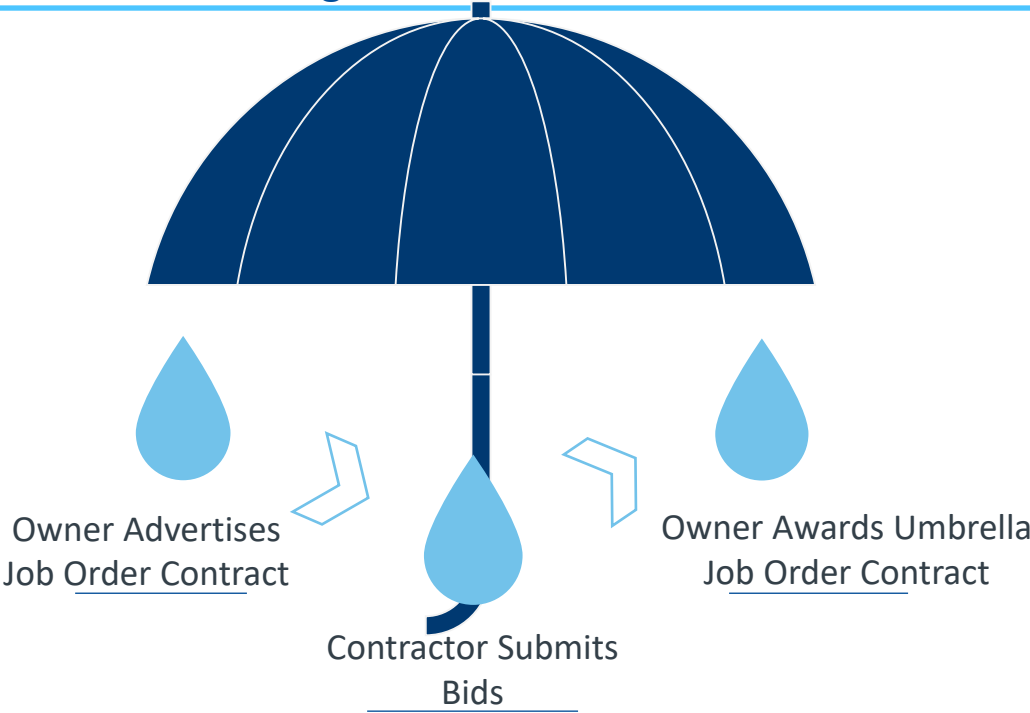
Alterations



Umbrella Contract

Part 1 – Bidding the Umbrella Job Order Contract

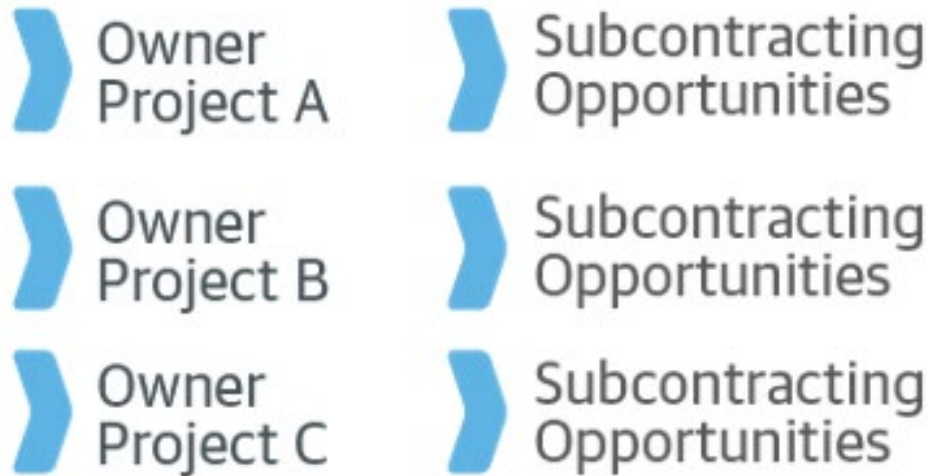
Part 2 – Procuring Individual Projects from Owner



Owner Advertises Job Order Contract

Contractor Submits Bid

Owner Awards Umbrella Job Order Contract



JOC Benefits



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



History with CSU

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

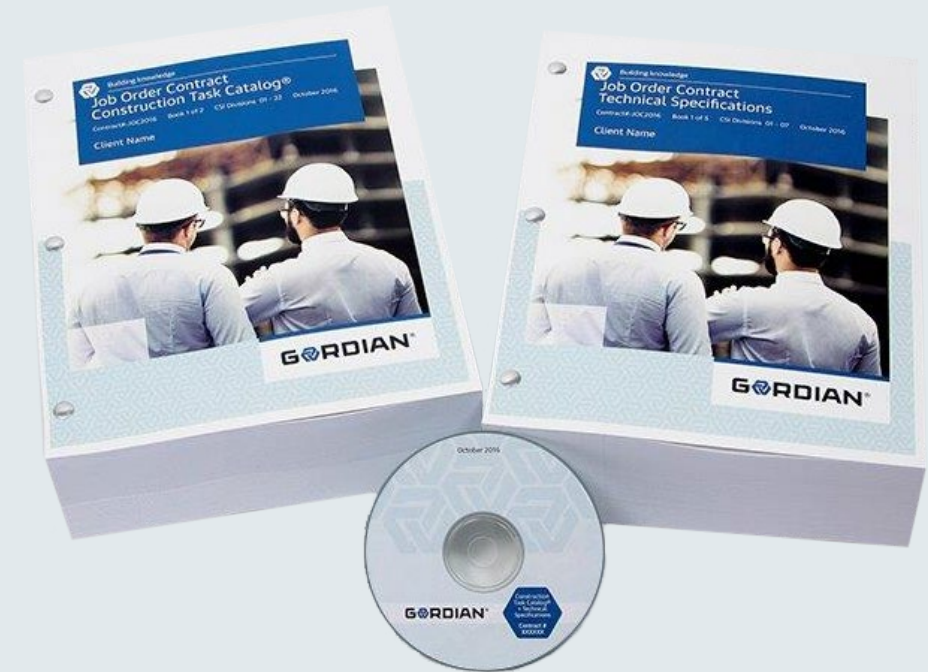
- Classroom and Lab remodels
- Hazmat abatement
- Dorm Upgrades
- Roofing
- Mechanical & HVAC
- Electrical & lighting
- Parking lot repaving
- Immediate Response



Contract Bid Documents



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



Front End Documents



- Notice to Contractors
- Bid Form (Sample)
- General Conditions (Chancellor's Office)
- Supplementary General Conditions (Chancellor's Office)
- Special Conditions (Campus specific)
- CTC and Tech Specs incorporated
- Pre-qualifications (Chancellor's Office and Campus)
- Sample Forms

CSU The California State University
WORKING FOR CALIFORNIA

BID PROPOSAL FORM
JOB ORDER CONTRACT, BID NUMBER 3863
California State University, Bakersfield
9001 Stockdale Hwy
Bakersfield, 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 documents, hereby proposes, with the rates stated below, to provide and furnish all of the labor, materials, tools, equipment, expendable and otherwise, apparatus, facilities, transportation, and permits, and to perform and complete in a workmanlike manner and within the specified time the work required, all in accordance with the contract documents and the Trustees' unit prices as adjusted as hereinafter set forth.

The Bidder understands that the Trustees reserve the right to reject any or all bids, to waive 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 especially Article 1.00 et seq. regarding instructions to bidders), and the bidder agrees that failure to comply with the conditions thereof shall be basis for rejection of this bid.

The bid must be submitted on this Proposal Form, completely filled out and in a sealed envelope provided by the Trustees, and delivered to the Procurement Office (Rm 103) at the Administration/News Building #09 at California State University, Bakersfield before 3:00 p.m. on Wednesday, June 3, 2020 or it will be disregarded. The Trustees will only accept bids from prequalified contractors with a current California State License Board-issued type B license and current California Department of Industrial Relations Public Works 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 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: . (Specify to four (4) decimal places)

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

Construction Forms
700 027 - 3/18



General Conditions



- 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



- 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®



- 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 15-25 mile radius of campus
- The tasks represent the “Scope of Work” for the umbrella contract on which you are bidding
- Current Prevailing Wage rate applies
- Direct cost of construction *only*

Construction Task Catalog®



Exterior Improvements	32	32
Bases, Ballasts, And Paving	32 10	
Unit Paving	32 14	

MINOR CSI UOM DESCRIPTION	TOTAL DIRECT UNIT COST	DEMOLITION UNIT COST
32 16 Curbs, Gutters, Sidewalks, And Driveways <small>(32 10)</small>		
32 16 13 Curbs And Gutters <small>(32 16)</small> <small>Note: Includes transitions. Demolition Includes two saw cuts (each end) of curbs and gutters for lengths up to 100'. See CSI section 02 41 19 13-00-3 for additional saw cuts within the 100'.</small>		
32 16 13 13 Cast-In-Place Concrete Curbs And Gutters <small>(32 16 13)</small> <small>Note: Includes concrete, forms, rebar, chairs (where necessary), expansion joints.</small>		
32 16 13 13-0001 Concrete Curb, Cast In Place <small>(32 16 13 13)</small> <small>Note: Includes delivered concrete, forms, rebar, chairs (where necessary), expansion joints, finish and curing.</small>		
32 16 13 13-0002 LF 6" X 12" Cast In Place Concrete Curb <i>For Up To 20, Add 4.03</i> <i>For >20 To 50, Add 2.27</i> <i>For >50 To 100, Add 0.88</i> <i>For >500 To 1,000, Deduct -0.88</i> <i>For >1,000, Deduct -1.50</i>	7.18	3.23
32 16 13 13-0003 LF 6" X 12" Cast In Place Concrete Curb - Radius <i>For Up To 20, Add 4.63</i> <i>For >20 To 50, Add 2.61</i> <i>For >50 To 100, Add 1.01</i> <i>For >500 To 1,000, Deduct -1.01</i> <i>For >1,000, Deduct -1.72</i>	8.18	3.72

CSI MasterFormat

Full description of task

Price includes labor, material + equipment for your location

Demolition price

Section + task notes

Modifiers for variations or quantity discounts

Understanding the Construction Cost Catalog®



- 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
 - [CSU JOC Landing Page](#)

GORDIAN
Using The Construction Task Catalog®

About the CTC:

- ❑ This Construction Task Catalog® (CTC) was developed and customized by The Gordian Group, Inc. specifically for «Owner», priced locally using current labor, material and equipment costs, and published in «Month» 2020.
- ❑ The Gordian Group, Inc. licenses the use of this CTC and other proprietary information and software for the sole purpose of providing Job Order Contracting services to «Owner». Use of this CTC and other proprietary information and software for any other purpose, or for any other entity, is expressly prohibited without the express written consent of The Gordian Group, Inc.

MasterFormat™

- ❑ The tasks in this Construction Task Catalog are organized using CSI's MasterFormat.

CSU
MasterFormat® is published jointly by CSI and Construction Specifications Canada (CSC). It is brought to you by CSI and Copyright © 2020 by CSI. All Rights Reserved. For more information, visit [www.MasterFormat.com](#).

The Unit Prices Include:

LABOR COSTS:

- ❑ Labor costs include direct labor through the working foreperson level at straight-time prevailing wage rates including fringe benefits and an allowance for Social Security, Medicare taxes, worker's compensation, unemployment insurance, and employee benefits.
- ❑ Labor costs include unloading equipment, materials, and tools, and transporting the same up or down 2 1/2 stories and 125' to reach the project site; layout, measuring and cutting to fit; performing the task; disposal of excess material; and time for lunch and breaks.

Equipment Costs:

- ❑ Equipment costs include all equipment required to accomplish the task.
- ❑ Mobilization is included for all equipment except large equipment (e.g. cranes, bulldozers, excavators, backhoes, bobcats etc.), which exclude mobilization.
- ❑ Equipment costs include all operating expenses such as fuel, electricity, lubricants, etc.

MATERIAL COSTS:

- ❑ Material costs include the cost of the material, delivery, and all incidentals and accessories integral to the installation.
- ❑ Material costs include manufacturer's and/or fabricator's shop drawings.
- ❑ Material costs for roofing, drywall, VCT, carpet, wall covering, ceiling tile, pipe, conduit, concrete, etc. include an allowance for waste. This list is not intended to be all inclusive, but descriptive of the types of construction materials that are typically sold in standard lengths, sizes and weights.
- ❑ Material costs for imported materials (e.g. aggregate, sand, soil, etc.) include delivery up to 15 miles from the closest approved source.

The Adjustment Factors Include:

The Adjustment Factors include the following costs, unless specifically excluded by the terms of the Contract Documents.

BUSINESS COSTS:

- ❑ Office overhead, including, but not limited to, office space, office equipment, office and management personnel, office supplies, and employee transportation.
- ❑ Insurance and bonding.
- ❑ Profit.

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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®



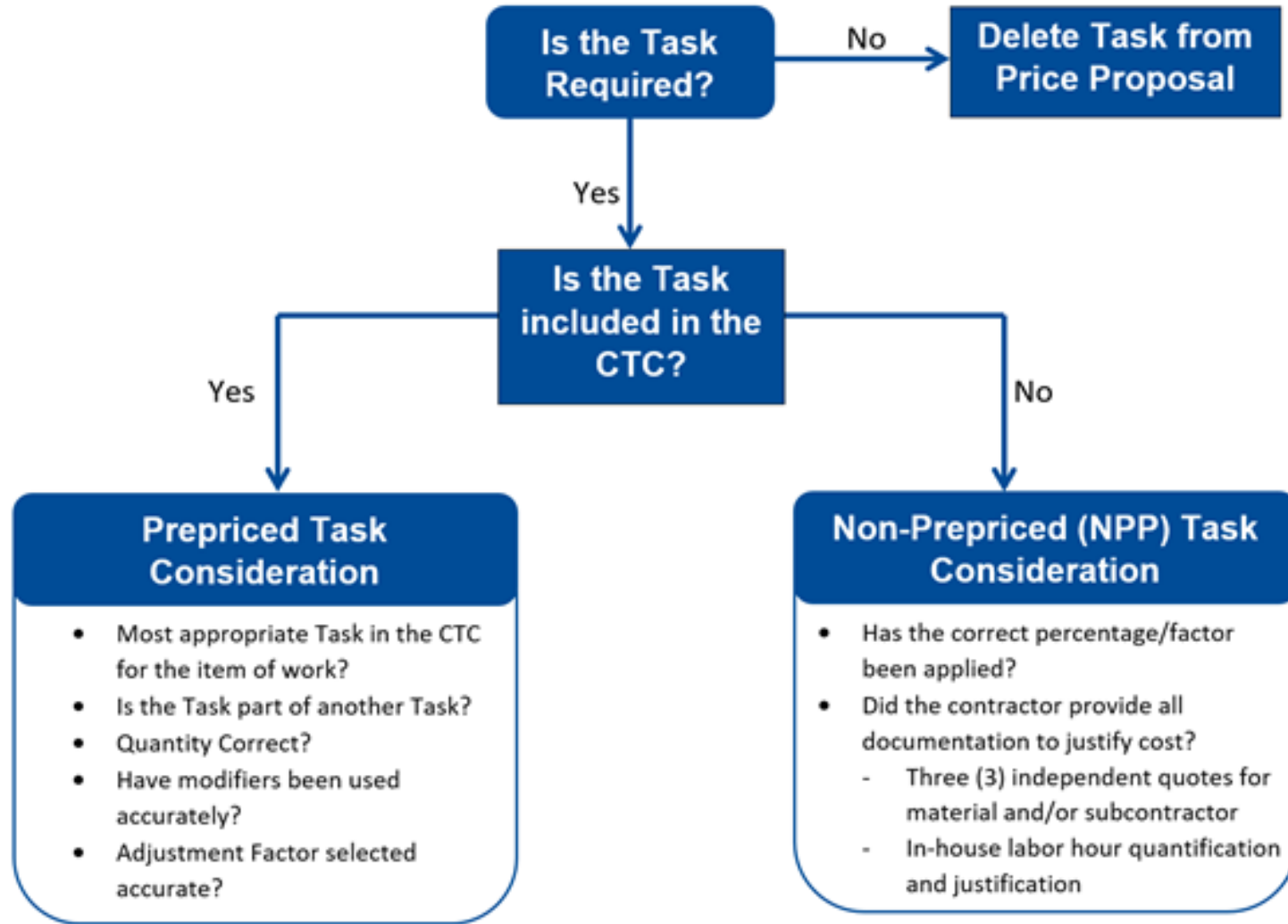
Contractors Never Get Paid Separately For:

- 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.



Step 1



Step 2



Step 3



Step 4



Step 5



Step 6



Joint Scope Meeting

Request for Proposal

Price Proposal

Price Proposal Review

NTP / JOA Issued

Construction Starts

JOC Process





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



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.

$$\begin{array}{r} \text{Unit Price} \quad \times \quad \text{Quantity} \quad \times \quad \text{Adjustment Factor} \quad = \quad \text{Total for Task} \\ + \\ \text{Unit Price} \quad \times \quad \text{Quantity} \quad \times \quad \text{Adjustment Factor} \quad = \quad \text{Total for Task} \\ + \\ \text{Unit Price} \quad \times \quad \text{Quantity} \quad \times \quad \text{Adjustment Factor} \quad = \quad \text{Total for Task} \\ \hline \text{Total Job Order Price} \end{array}$$

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



- Leads to Arguments in Proposal Review
 - Unsupportable/Illegal Tasks (Fraud)
 - Exaggerated Quantities (Fraud)
- 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
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**

Sample Price Costs: CTC vs. Historical Cost



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

• Replace Boiler	\$ 33,055.73	• Replace Boiler	\$ 34,500.00
• Doors/Hardware	\$ 8,282.09	• Doors/Hardware	\$ 7,250.00
• Lighting	\$ 13,119.77	• Lighting	\$ 12,750.00
• Plumbing	\$ 11,886.53	• Plumbing	\$ 10,500.00
TOTAL = \$ 66,344.12		TOTAL = \$ 65,000.00	



Sample Price Costs: Putting it all together

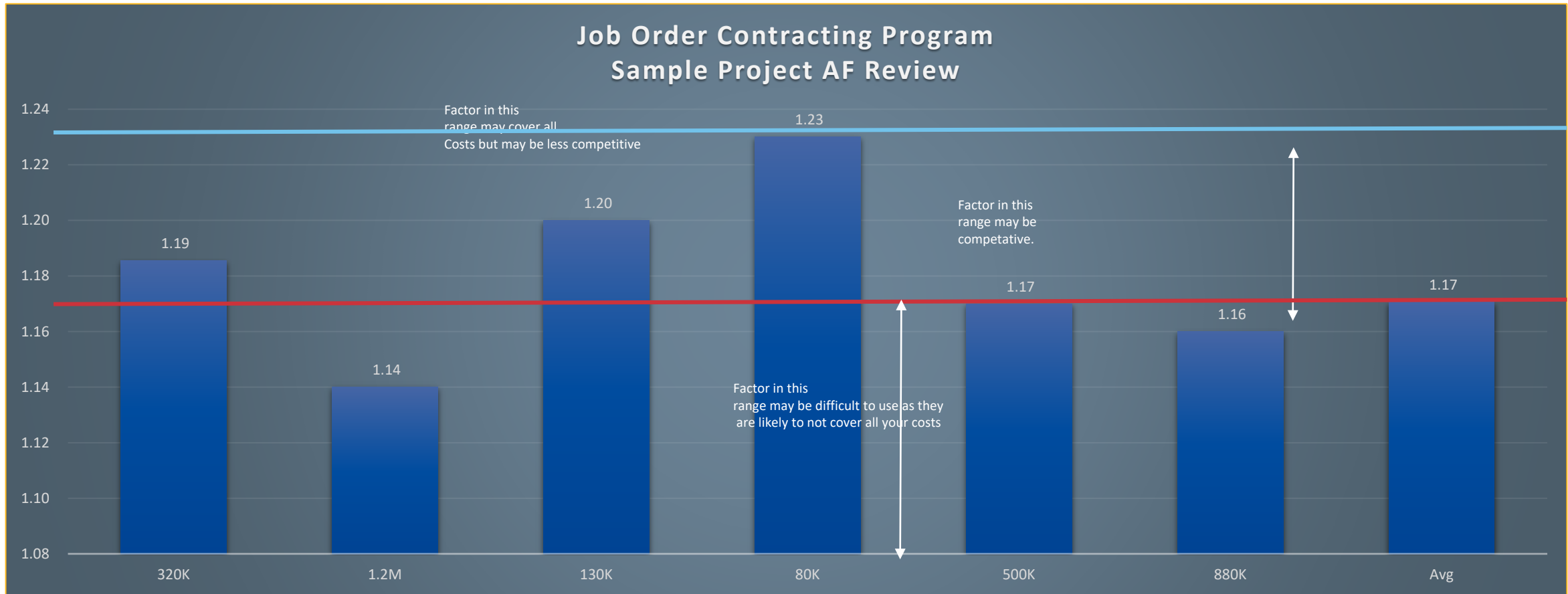


- A. Direct Cost of Work from Quotes \$65,000.00
- B. Overhead 10%* \$ 6,500.00
- C. Subtotal (Cost & O/H) \$71,500.00
- D. Profit 10%* \$ 7,150.00
- E. Subtotal (Cost & O/H & Profit) \$78,650.00
- F. Price From CTC \$66,344.12
- **Adjustment Factor (= E / F) = 1.1855**

*Sample Only. Contractor to determine O/H & Profit.

Prepare this calculation for more than one sample project.

Sample Price: Putting it all together





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**

Filling Out the Bid Form



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:

. (Specify to four (4) decimal places)

Other Than Normal Working Hours

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. (Specify to four (4) decimal places)

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

Premium Working Hours

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. (Specify to four (4) decimal places)

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

Filling Out the Bid Form



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 the weighted, composite bid for this contract.)	7.	<u>1.2147</u>

Bids Package Requirements



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



Solicitation Details

- 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
- 3 Contracts to be offered on this solicitation

Contract	Contract Type	Maximum Contract Duration	Minimum Contract Value	Initial Maximum Contract Value	Initial Payment & Performance Bonding (Each)	Bid Security
PW22-1	General Construction, B	1 year	\$0	\$1,000,000	\$1,000,000	\$25,000

Solicitation Details



- 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

- <https://caleprocure.ca.gov/pages/PublicSearch/supplier-search.aspx>

- <http://www.dgs.ca.gov/pd/Programs/OSDS/GetCertified.aspx>

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%

Solicitation Details



- 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

Solicitation Details



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

The screenshot displays the GordianCloud software interface. On the left is a dark sidebar with navigation options: Dashboard, Contracts (highlighted), Projects, Directory, Accounts, and Settings. The main content area shows a table titled 'Active Contracts' with the following data:

NUMBER	NAME	DEPARTMENT	GROUP
> 2-16-DNM-011	Maintenance Contract for Schools	Facilities	Organizational Development, Procurement
> DNM-2016-C001	Facilities Maintenance Contract - County Administrative Offices	Facilities	Organizational Development, Procurement
DNM-2016-AEC002	Design Services for County Administrative Offices	Procurement	Organizational Development, Procurement

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 Wednesday, August 24th, 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 Addie.Dunaway@humboldt.edu,

Until Thursday, September 15th 2022, 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: Addie.Dunaway@humboldt.edu 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:
 - **Friday September 6th, 2022, by 5:00 P.M.**
- Submit questions to: Addie E Dunaway
Addie.Dunaway@humboldt.edu
- Systemwide Financial Prequalification Forms and Supplemental Prequalification Forms due not later than:
 - **Wednesday, August 31, by 5:00 P.M.**
- Bids are due by
 - **Thursday, September 15th 2022 at 3:00pm**