

Job Order Contracting
Humboldt State University
JOC Bid No. PW21-JOC
Mandatory Pre-Bid Meeting:
August 11, 2021



Pre-Bid Conference Agenda



- Humboldt State Job Order Contract History
- JOC Overview
- JOC Contract Documents
- JOC Process
- Solicitation Details
- Understanding the Construction Task Catalog® (CTC)
- Calculating the Bid
- Bid Considerations & Review
- Contractor Adjustment Factors
- Risk of Low Adjustment Factors
- Questions



Humboldt State JOC Overview



- Using Job Order Contracting since 2006
- Typically Uses JOC for:
 - Facility Repair and Renovation Projects
 - Straightforward Work Items
 - Replacements in Kind
- Humboldt State has Trained and Dedicated Staff to Manage JOC



Job Order Contracting



Definition

- Indefinite delivery/indefinite quantity process (IDIQ)
- Enable contractors to complete a substantial number of individual projects with a **single bid**
- Tasks based on competitively-bid, **preset prices**

Value

- Saves time and money
- Provides transparency and auditability

Umbrella Contract

Part 1

Bidding the Umbrella Job Order Contracting Contract

Owner
Advertisizes
Job Order
Contracting
Contract



Contractors
Submit
Bids



Owner
Awards
Umbrella
Job Order
Contracting
Contract

Part 2

Procuring Individual Projects From Owner

Owner
Project A

Subcontracting
Opportunities

Owner
Project B

Subcontracting
Opportunities

Owner
Project C

Subcontracting
Opportunities



Why JOC Works For Contractors



- Good work is rewarded with more work
 - Profit is a function of volume
 - Volume is driven by performance
 - JOC provides a steady flow of work
 - Win a higher percentage of proposed projects
 - Easier process for project proposals
- Long-term relationship with Humboldt State University
 - Good work is rewarded with more work
 - Develop partnership with Humboldt State University
- Ability to leverage Subcontractor and Supplier relationships
- Ability to sell value, not just compete to be the lowest price



Why JOC Works For Contractors



- Reduced Risk
 - Fixed prices
 - No negotiations
 - Payment for every element of work performed
 - Ability to provide input during scope development
 - Eliminates quibbling over change orders
 - Reduced chance of claims
- Build bond capacity
- Build your presence and enhanced reputation in the local community



Why JOC Works For The University



- A Fixed Priced, Fast Track Procurement Process
- Job Orders are Lump Sum
- The Ability to Accomplish a Substantial Number of Individual Projects with a Single Competitively Bid Contract
- Contractor Has A Continuing Financial Incentive To Provide
 - Responsive Services
 - Accurate Proposals
 - Quality Work on Time
 - Timely Close Out
- Future Purchase Orders Tied to Contractor Performance
 - No Obligation To Award Specific Projects
 - Humboldt State University can Use All Other Methods For Accomplishing Projects



Why JOC Works For The University



- Increases use of SBE/DVBE businesses
 - The absence of pre-established quantities inhibits trade staffing by the prime contractor.
 - Responsiveness requires the prime to use multiple local subcontractors.
 - No bonding requirement for the sub, faster payment, and less red tape, thereby expanding business opportunities for small businesses
 - The University reviews and approves all Subcontractors prior to issuing Job Orders to ensure compliance with goals
 - All University contracts have subcontractor participation goals
- Increases Transparency
 - The University Has the Ability to See and Review the Back-Up Pricing Details
- Schedule Flexibility
 - No Shelf Life for Prices or Job Orders
 - Fast procurement cycle is good for end of fiscal year projects



The Process



Contract Documents



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

Front End Documents

- Exhibit A Notice to Contractors
- Exhibit B Bid Proposal Form (Sample)
- Exhibit C Contract General Conditions
- Exhibit D Supplementary General Conditions
- Exhibit E Contract Special Conditions
- Exhibit F Forms
- Exhibit G Prevailing Wages
- Exhibit H Technical Specifications
- Exhibit I Construction Task Catalog

HUMBOLDT STATE UNIVERSITY

TABLE OF CONTENTS JOB ORDER CONTRACT

Bid Number.....PWZ1-JOC
Bid Opening Date.....Thursday, August 12, 2021
Bid Opening Time.....3:00 p.m.

CONTENTS

Exhibit A	Notice to Contractors
Exhibit B	Bid Proposal Form (Sample)
Exhibit C	Contract General Conditions
Exhibit D	Supplementary General Conditions
Exhibit E	Contract Special Conditions
Exhibit F	Forms
Exhibit G	Prevailing Wages (by reference)
Exhibit H	Technical Specifications
Exhibit I	Construction Task Catalog

Construction Task Catalog®

- Catalog of Pre-Priced Construction Tasks
- Organized by Construction Specifications Institute (CSI)
- Based on Local Labor, Material & Equipment Costs
- The tasks represent the “Scope of Work” for the contract



Technical Specifications

- Specifies Quality of Materials and Workmanship
- Corresponds with Tasks in the Construction Task Catalog[®]



Understanding the Construction Cost Catalog®



- 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


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.

 MasterFormat® is produced jointly by CSI and Construction Specifications Canada (CSC). U.S. copyright is held by CSI and Canadian copyright by CSC. All Rights Reserved. For license information, contact CSI at csi@csiwel.org. For more information on MasterFormat 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.

<Month> 2020 copyright © 2020 The Gordian Group, Inc.

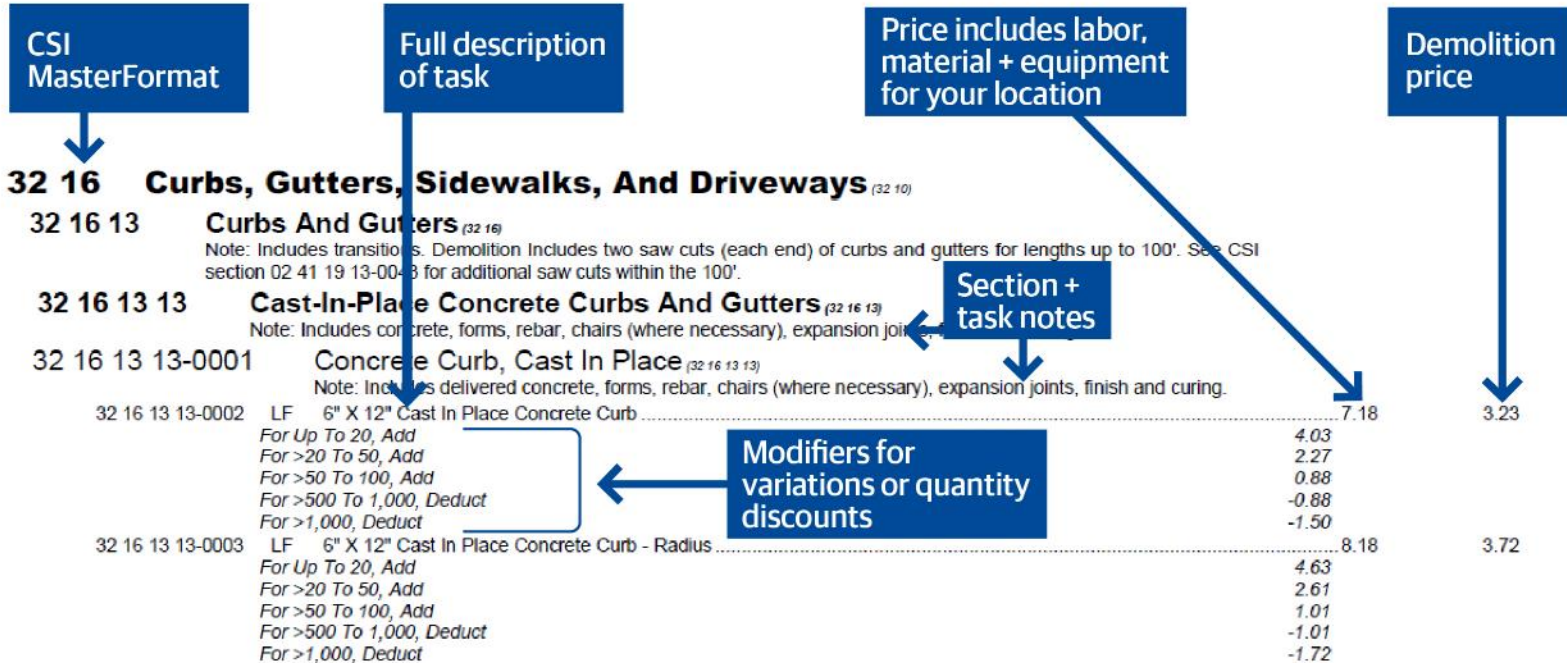
Sample Big Note Page 00 - 1

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</i> <i>For >20 To 50, Add</i> <i>For >50 To 100, Add</i> <i>For >500 To 1,000, Deduct</i> <i>For >1,000, Deduct</i>	7.18 4.03 2.27 0.88 -0.88 -1.50	3.23
32 16 13 13-0003	LF	6" X 12" Cast In Place Concrete Curb - Radius <i>For Up To 20, Add</i> <i>For >20 To 50, Add</i> <i>For >50 To 100, Add</i> <i>For >500 To 1,000, Deduct</i> <i>For >1,000, Deduct</i>	8.18 4.63 2.61 1.01 -1.01 -1.72	3.72



Understanding the Construction Cost Catalog®



Include All Appropriate Tasks:

32 16 23 00-0002	4" Cast In Place Concrete Sidewalk	SF	\$5.06	400	\$2,024.00	
	For Quantities 100 to 500, Add	SF	\$2.04	400	\$816.00	
32 11 16 00-0015	4" Crushed Aggregate Base	SF	\$0.63	400	\$252.00	
	For Quantities Under 1000	SF	\$0.18	400	\$72.00	
01 71 13 00-0003	Mobilize Backhoe	EA	\$402.63	1	\$402.63	
31 23 16 36-0006	Excavation by Backhoe	CY	\$3.75	11	\$41.25	
	For Quantities Under 20 CY, Add	CY	\$3.75	11	\$41.25	
31 23 16 36-0028	Loading Excess Materials	CY	\$3.42	13.75	\$47.03	
	For Quantities Under 20 CY, Add	CY	\$3.42	13.75	\$47.03	
01 74 19 00-0029	Hauling to Dump Site	CYM	\$0.51	207	\$105.57	
01 74 19 00-0021	Landfill Dump Fee	CY	\$15.14	13.75	\$208.18	\$4,056.93
						/400
						\$10.14

Compare these prices

* Sample only

Understanding the Construction Cost Catalog®



General Rules: from the 1st six pages of the CTC – aka The Big Note

- 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
- Unit Prices Include Testing, Calibration, Balancing Etc. for New Work
- Unit Prices Include all Fasteners, Bolts, Anchors, Adhesives Etc. For New Work
- Unit Prices for Tasks Such as Windows, Doors, Frames, Countertops Etc. Include Sealant and Caulk

Understanding the Construction Cost Catalog®



- Demo Price Includes Loading into Truck or Dumpster.
- If Item Demolished as Part of Different Task, It will Not be Paid for Separately
- Contractor Paid for Installed Quantities Only. Waste is Included in Unit Price
- Assembly Prices take Precedence over Component Pricing
- 14' Working Height for All Work Except Masonry
- 4' Working Height for Masonry
- Dumpsters are a Separate Task and include hauling and disposal fees



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
- Portable Toilet, Field Office, Field Office Equipment for Contractor's Use
- Layout, Site Engineering for the Work Itself

Non Pre-Priced Tasks



- Definition:
- A non pre priced task is one which is not represented in the CTC, nor does the CTC contain an acceptable alternative task.
- In the event a task is deemed “Non Pre-Priced” by the Owner, it will be submitted as a “NPP” (Non Pre-Priced) task by the contractor.
- Absent the owner’s designation as NPP, the contractor is not able to submit or include anything as an NPP task in a proposal

Non Pre-Priced Tasks



Contractor Performed Duties

A = The unit price appearing in the Construction Task Catalog for each trade classification required multiplied by the quantity and multiplied by the appropriate Adjustment Factor identified and submitted in the Job Order Price Proposal as a pre-priced task.

B = The unit price appearing in the Construction Task Catalog for each piece of equipment required multiplied by the quantity and multiplied by the appropriate Adjustment Factor identified and submitted in the proposal as a pre-priced task.

C = The lowest of three independent quotes for all materials multiplied by the quantity and multiplied by the non pre-priced Adjustment Factor identified and submitted in the Job Order Price Proposal as a non pre-priced task.

Total cost for non pre-priced tasks performed with Contractor's own forces = A + B + C.

Non Pre-Priced Tasks Cont.



Subcontractor Performed Duties

If the Work is to be subcontracted, the Contractor must submit three independent quotes for the Work from Subcontractors. The Contractor shall not submit a quote or bid from any supplier or subcontractor that the Contractor is not prepared to use. The University may require additional quotes and bids if the suppliers or subcontractors are not acceptable or if the prices are not reasonable. If three quotes or bids cannot be obtained, the Contractor will provide the reason in writing for the University's approval as to why three quotes cannot be submitted.

D = Subcontractor Costs (supported by three quotes)

Total Cost for non pre-priced tasks performed by subcontractor = D multiplied by the Non Pre-Priced Adjustment Factor.

Non Pre-Priced Tasks

The final price submitted for Non Pre-priced tasks shall be according to the following formulas:

a. Non Pre-Priced Adjustment Factor.

The Trustees will base the calculation of the non pre-priced adjustment factor on the Normal Working Hours Adjustment Factor, as bid by the Contractor, in **one of two ways**.

(1) When the Normal Working Hours Adjustment Factor as bid is 1.0000 or less.

In this case, the formula to determine the Non Pre-priced Adjustment Factor is:

the cost of the Non Pre-priced item multiplied by the Normal Working Hours Adjustment Factor, multiplied by 1.15. For example: if the Normal Working Hours Adjustment Factor is .8500; and the cost of the non pre-priced item is \$10,000, the mark-up formula is:
 $(\$10,000 * .8500) * 1.15 = \$9,775$.

(2) When the Normal Working Hours Adjustment Factor as bid is 1.0001 or more.

In this case, the University-allowed mark-up on Non Pre-priced items shall not exceed 15% total, and the formula is: the cost of the Non Pre-priced item multiplied by 1.15. For example: if the Normal Working Hours Adjustment Factor is 1.2000, and the cost of the Non Pre-priced item is \$10,000, the mark-up formula is: $\$10,000 * 1.15 = \$11,500$.



Bidding Process



- Award Based on Competitive Bid
 - Must Bid 3 Adjustment Factors:
 - Normal Working Hours (Daytime): 7:00 am to 5:00 pm Monday to Friday, except Holidays
 - Other Than Normal Working Hours (Nighttime): 5:00 pm to 8:00 am Monday to Friday and anytime Saturdays
 - Premium Working Hours: Those hours on Sundays and Holidays.
 - Adjustment Factors Apply to All Tasks in the CTC
 - Each Adjustment Factor is Weighted to Create an Award Criteria Figure
 - Lowest Award Criteria Figure from a Responsive, Responsible Bidder is Determined to be the Lowest Price

Solicitation Details

- Prior to Bidding Humboldt State Cannot:
 - Identify or Commit to any Specific Project or Location
 - Identify or Commit to any Specific CTC Tasks or Quantities
- The JOC may be increased to \$3,000,000

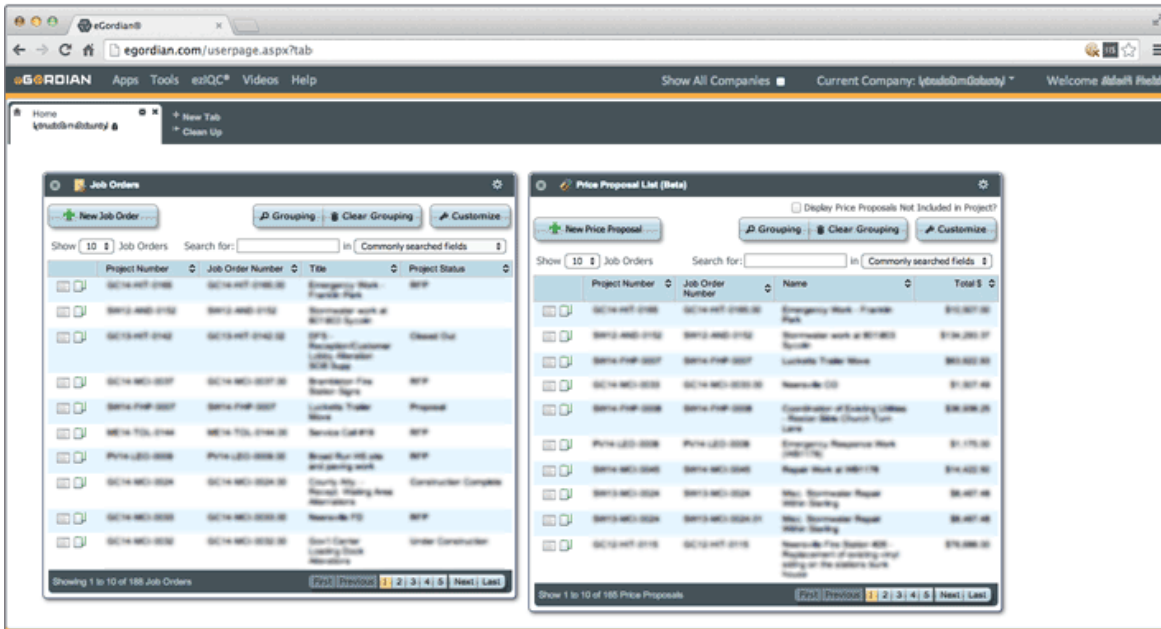
Contract Number	Contract Type	Minimum Contract Value	Maximum Contract Value	Contract Term	Bid Bond	Initial Payment & Performance Bonding (Each)
PW21-JOC	General Construction "B"	\$0	\$1,000,000	1 Year	\$25,000	\$1,000,000

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)
 - Non Small-Business Bidders Claiming the Small Business Preference must meet 25% small business participation for each Job Order.
- DVBE Bid Advantage (Review requirements in the General Conditions)
- DVBE Participation Requirement of 3%
- Bid Security: \$25,000
- Prequalification required 10 days prior to bid due date at http://www.calstate.edu/cpdc/cm/contractor_prequal_bidders.shtml
- DIR registration required prior to bid at <http://www.dir.ca.gov/Public-Works/PublicWorks.html>

Solicitation Details



The screenshot displays the eGordian software interface. The left panel, titled 'Job Orders', shows a table with columns for Project Number, Job Order Number, Title, and Project Status. The right panel, titled 'Price Proposal List (Beta)', shows a table with columns for Project Number, Job Order Number, Name, and Total \$.

Project Number	Job Order Number	Title	Project Status
0619-407-0185	0619-407-0185-01	Emergency Work - Franklin Park	RFIP
0619-408-0152	0619-408-0152	Stormwater work at 8014603 Spruce	
0619-407-0142	0619-407-0142-02	GPS - Replacement Customer Utility Meter - 1024 Road	Closed Out
0619-403-0207	0619-403-0207-01	Remediation Fire Station Sign	RFIP
0619-403-0207	0619-403-0207	Luckville Trailer Move	Proposed
0619-753-0194	0619-753-0194-01	Service Call #10	RFIP
0619-423-0208	0619-423-0208-01	Stage Run Hill job and parking work	RFIP
0619-403-0204	0619-403-0204-01	County Mt - Heavy Hauling Area - Hazardous	Construction Complete
0619-403-0205	0619-403-0205-01	Nearside TD	RFIP
0619-403-0202	0619-403-0202-01	South Center Loading Dock Alterations	Under Construction

Project Number	Job Order Number	Name	Total \$
0619-407-0185	0619-407-0185-01	Emergency Work - Franklin Park	\$10,937.00
0619-408-0152	0619-408-0152	Stormwater work at 8014603 Spruce	\$134,289.07
0619-403-0207	0619-403-0207	Luckville Trailer Move	\$63,922.00
0619-403-0207	0619-403-0207-01	Nearside TD	\$1,937.98
0619-403-0208	0619-403-0208-01	Coordination of Building Utilities - Repair 804 Church Turn Lane	\$39,238.25
0619-423-0208	0619-423-0208	Emergency Response Work (RFIP)	\$1,175.00
0619-403-0204	0619-403-0204	Repair Work at 801176	\$14,422.00
0619-403-0204	0619-403-0204	Mt. Stormwater Repair - Heavy Hauling	\$8,467.98
0619-403-0204	0619-403-0204-01	Mt. Stormwater Repair - Heavy Hauling	\$8,467.98
0619-407-0118	0619-407-0118	Nearside Fire Station 403 - Replacement of existing and adding of the existing work items	\$74,988.00

Internet Based Software Provided with Contract

- eGordian[®] Software Expedites the Job Order Process
 - Price Proposals
 - Subcontractor Lists
 - Tracking Dates
 - Required Job Order Forms
- Training provided



Method to Calculate Factors

- **Use Historical Project Data**
 - Select a Completed Project
 - You Know Scope and Direct Costs
 - Price Project From CTC
 - Add on Overhead and Profit
 - Calculate the Adjustment Factor

Sample Project: Detailed Scope of Work



- Interior Renovation

- Doors and Hardware
 - Replace 12 interior doors, hinges and hardware
 - Doors shall be 3x7, solid core wood doors
 - Grade 2 locksets with knobs
 - Replace 2 push bar exist devices and door closers on exit doors
- Interior Lighting
 - Replace all lay-in troffer fixtures on first and second floors. 48 in total
 - Replace 4 exit fixtures
 - Replace 12 industrial fixtures in shop area
- Plumbing Fixtures
 - Replace 8 bathroom sinks, 8 faucets, and 8 toilets in men's and women's bathroom in admin building and shop area
 - Replace 4 water fountains
- Replace Boiler
 - Demo existing boiler and as much piping and venting to accommodate new boiler. Install a new 1028 mbh oil fired cast iron boiler. No access for packaged boiler. Must field assemble sections. Provide new piping as required.
- Normal Working Hours Apply

Sample Project: Price Proposal



Contractor's Price Proposal Detail - Category					
Date:	February 05, 2012				
Contract Number:	PR4258				
Work Order Number:	W000012-FLR2012				
Work Order Title:	W000012-FLR2012-Pre-Bo Project				
Contractor:	The Gordian Group				
Proposal Value:	\$74,754.78				
Proposal Name:	A Trade Renovation				
Code	Unit	Item	Unit	Description	Line Total
Category - Boiler					
1	EA	00 00 00 00 00 00	EA	001 Condenser x 7 Long Hinge Boiler Expansion Fan	\$74,754.78
				Quantity	Unit Price
				Factor	Total
				1.0000	\$74,754.78
2	EA	00 00 10 00 00 00	EA	007 Condenser Fan x 007 Flue Gas Damper Installation	\$1,989.98
				Quantity	Unit Price
				Factor	Total
				1.0000	\$1,989.98

Contractor's Price Proposal Summary - Category

Work Order #: 000001 Florida 2014
Title: Florida Sample Renovation
Contractor: The Gordian Group
Proposal Value: \$66,344.12
Proposal Name: Florida Sample Renovation

Boiler:	\$33,055.73
Doors and Hardware:	\$8,282.09
Lighting:	\$13,119.77
Plumbing:	\$11,886.53
Work Order Proposal Total	\$66,344.12

Contractor's Price Proposal Detail - Category					
Category - Lighting					
1	EA	00 00 00 00 00 00	EA	001 Condenser x 7 Long Hinge Boiler Expansion Fan	\$74,754.78
				Quantity	Unit Price
				Factor	Total
				1.0000	\$74,754.78
2	EA	00 00 10 00 00 00	EA	007 Condenser Fan x 007 Flue Gas Damper Installation	\$1,989.98
				Quantity	Unit Price
				Factor	Total
				1.0000	\$1,989.98
Category - Plumbing					
1	EA	00 00 00 00 00 00	EA	001 Condenser x 7 Long Hinge Boiler Expansion Fan	\$74,754.78
				Quantity	Unit Price
				Factor	Total
				1.0000	\$74,754.78
2	EA	00 00 10 00 00 00	EA	007 Condenser Fan x 007 Flue Gas Damper Installation	\$1,989.98
				Quantity	Unit Price
				Factor	Total
				1.0000	\$1,989.98
Category - Doors and Hardware					
1	EA	00 00 00 00 00 00	EA	001 Condenser x 7 Long Hinge Boiler Expansion Fan	\$74,754.78
				Quantity	Unit Price
				Factor	Total
				1.0000	\$74,754.78
2	EA	00 00 10 00 00 00	EA	007 Condenser Fan x 007 Flue Gas Damper Installation	\$1,989.98
				Quantity	Unit Price
				Factor	Total
				1.0000	\$1,989.98
Category - Boiler					
1	EA	00 00 00 00 00 00	EA	001 Condenser x 7 Long Hinge Boiler Expansion Fan	\$74,754.78
				Quantity	Unit Price
				Factor	Total
				1.0000	\$74,754.78
2	EA	00 00 10 00 00 00	EA	007 Condenser Fan x 007 Flue Gas Damper Installation	\$1,989.98
				Quantity	Unit Price
				Factor	Total
				1.0000	\$1,989.98

Subtotal for Category - Lighting	
Category - Lighting	\$13,119.77
Category - Plumbing	
Category - Plumbing	\$11,886.53
Category - Doors and Hardware	
Category - Doors and Hardware	\$8,282.09
Category - Boiler	
Category - Boiler	\$33,055.73
Total	\$66,344.12

Subtotal for Category - Lighting	
Category - Lighting	\$13,119.77
Category - Plumbing	
Category - Plumbing	\$11,886.53
Category - Doors and Hardware	
Category - Doors and Hardware	\$8,282.09
Category - Boiler	
Category - Boiler	\$33,055.73
Total	\$66,344.12

Subtotal for Category - Lighting	
Category - Lighting	\$13,119.77
Category - Plumbing	
Category - Plumbing	\$11,886.53
Category - Doors and Hardware	
Category - Doors and Hardware	\$8,282.09
Category - Boiler	
Category - Boiler	\$33,055.73
Total	\$66,344.12



Sample Price: CTC vs. Quote



Direct Cost of Work from CTC

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

TOTAL = \$ 66,344.12

Direct Cost of Work from Quotes or Estimates

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

TOTAL = \$ 65,000.00

Sample Price: Putting it all together



• A.	Direct Cost of Work from Quotes	\$65,000.00
• B.	Overhead 10%*	<u>\$ 6,500.00</u>
• C.	Subtotal (Cost & O/H)	\$71,500.00
• D.	Profit 10%*	<u>\$ 7,150.00</u>
• 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.

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

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.

* Sample only

Filling Out the Bid Form



		Award Formula	
Line 1.	Normal working hours Adjustment Factor	1.	<u>1 . 1 8 8 5</u>
Line 2.	Multiply Line 1 by (80) %	2.	<u>0 . 8 9 4 8</u>
Line 3.	Other Than Normal working hours Adjustment Factor	3.	<u>1 . 2 3 5 1</u>
Line 4.	Multiply Line 3 by (15) %	4.	<u>0 . 1 8 5 2</u>
Line 5.	Premium working hours Adjustment Factor	5.	<u>1 . 2 5 5 1</u>
Line 6.	Multiply Line 5 by (5) %	6.	<u>0 . 0 6 2 8</u>
Line 7.	Add Lines 2 and 4 and 6 (This is the weighted, composite score, as bid for this contract.)	7.	<u><u>1 . 1 4 2 8</u></u>

The above adjustment factors are to be specified to four decimal places. Any alteration, erasure, or change must be clearly indicated and initialed by the bidder. All prices and information required on the bid form must be either typewritten or neatly printed in ink (use figures only). The University reserves the right to revise all arithmetic errors in calculations for correctness. The bidder agrees that if there are any discrepancies or questions in the figures, the Trustees will use the lower figure despite the bidder's intent. The Trustees reserve the right to reject any and all bids and to waive any irregularities.

Bid Considerations



- Contractors Should Expect To
 - Prepare Incidental Drawings or Sketches for Some Projects
 - Justify Quantity Calculations
 - Explain Detail of Work
 - Prepare Proposals for Some Projects That Might be Canceled
 - Margins on CTC Tasks Vary
 - Some Projects are More Profitable than Others
 - Maintain a Fully Functioning Local Office
 - Hold Required Licenses

Contractor Adjustment Factor



Importance of Adjustment Factors

- Determines Lowest Bidder AND
- Used to Price Individual Work Orders
- Price Proposal Total Becomes the Lump Sum Job Order Amount

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

Risks of Low Adjustment Factor



- 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
 - Lost Profitability
- No Second Chance to Improve your Margin

Review of Key Points



- Focus on Total Potential Value of Contract
- Evaluate Construction Task Catalog[®]
 - Analyze Unit Prices
 - Know the General Guidelines for Using the CTC
- Contractor Performance Drives Volume
 - Ability to Market Program and Services
 - Responsive Service
 - Accurate Proposals
 - Safe and Clean Project Sites
 - High Quality Construction
 - On-Time Completion
 - On Time Close Out

Bids



- Complete and submit the following as your Bid:
 1. Bid Proposal Form (Exhibit B)
 2. Bidders Bond
 3. Certification
 4. Certificate of Appropriate License and California Company
 5. Small Business Preference & Certification Request (If applicable.)
 6. DVBE Forms and Declarations
 7. Non Collusion Affidavit
 8. Bid Proposal Form Signature Page

Questions



- Make Sure you confirmed your attendance at the pre-bid conference
- All questions concerning this solicitation must be received via email no later than Monday, **August 23, 2021** (10 days prior to bid):
- Submit questions to:
 - Addie Dunaway at Addie.Dunaway@humboldt.edu

Prequalification



Prequalification

Each bidder offering a proposal 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 and Supplementary General Conditions, especially Article 2.02, regarding the necessity to prequalify with the Trustees ten (10) business days prior to the bid date.

Financial Prequalification due Monday, August 23, 2021

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.

Supplementary Prequalification due Monday, August 23, 2021

Prospective bidders must also complete a Supplementary Prequalification Form included in the bid package. The form must be emailed to cocm.prequal@calstate.edu ten (10) business days prior to bid opening date.

Bid Package



- The Proposal Form found in the 2021 Bid Package is a sample form and cannot be used for bidding. Contractor must request a Bid Proposal Package from the University. Bid proposal packages are obtainable only by prequalified contractors, B licensed in the State of California, and registered with DIR.
- The bid packages must be requested from Humboldt State University, Contracts & Procurement via email from Addie Dunaway at Addie.Dunaway@humboldt.edu.
- Bid Proposals will only be accepted by email to Addie.Dunaway@humboldt.edu and must be received not later than 3:00 PM on Wednesday, September 1, 2021 to be considered.