

County of San Luis Obispo  
Department of Public Works  
2022 Job Order Contracting

JOC 22-01 & JOC 22-02

February 9, 2022



# Pre-Bid Conference Agenda

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- San Luis Obispo County 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

# County JOC Overview

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- Using Job Order Contracting for over 15 years
- Typically Uses JOC for:
  - Facility Repair and Renovation Projects
  - Straightforward Work Items
  - Replacements in Kind
- County Public Works has Trained and Dedicated Staff to Manage JOC
- Work with various departments including architectural services, roads, facilities, transportation, water quality, utilities, parks, etc.
- Millions of dollars of work ordered since inception of program

# JOC Overview



## 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

# JOC Overview: Umbrella Contract



## Part 1 Bidding the Umbrella Job Order Contract

Owner  
Advertises  
Job Order  
Contract



Contractors  
Submit  
Bids



Owner  
Awards  
Umbrella  
Job Order  
Contract

## Part 2 Procuring Individual Projects From Owner

Owner  
Project A

Subcontracting  
Opportunities

Owner  
Project B

Subcontracting  
Opportunities

Owner  
Project C

Subcontracting  
Opportunities

# JOC Overview: Why JOC Works For Contractors

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- 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 San Luis Obispo County
  - Good work is rewarded with more work
  - Develop partnership with the San Luis Obispo County
- Ability to leverage Subcontractor and Supplier relationships
- Ability to sell value, not just compete to be the lowest price

# JOC Overview: Why JOC Works For Contractors

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- 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
- Larger presence and enhanced reputation in the local community

# JOC Overview: Why JOC Works For Facility Owners

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- 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
  - San Luis Obispo County can Use All Other Methods For Accomplishing Projects

# JOC Overview: Why JOC Works For Facility Owners

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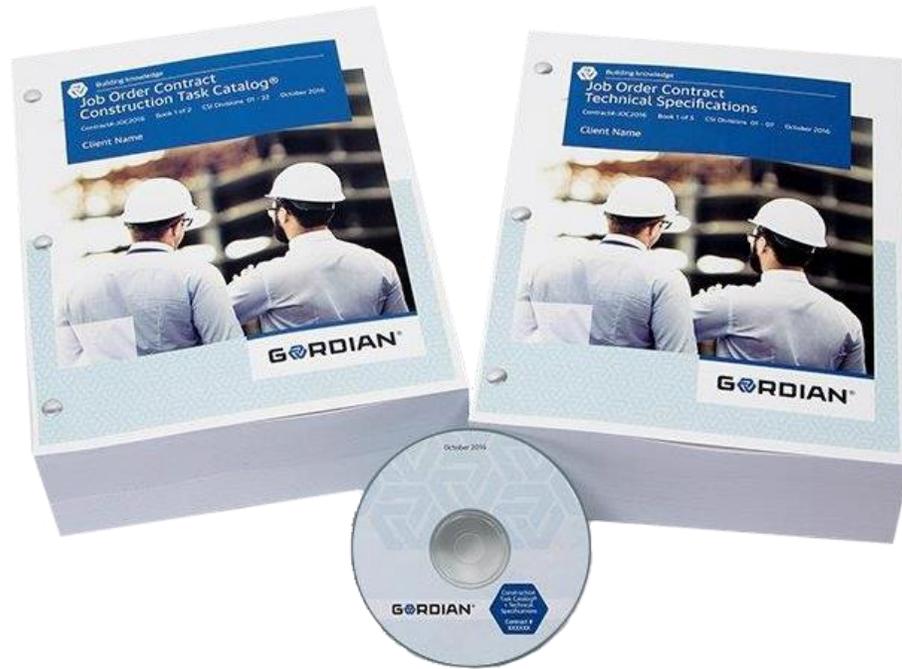
- Increases use of local/SBE/MWBE/DVBE businesses
  - The absence of pre-established quantities inhibits trade staffing by the prime contractor.
  - Responsiveness requires the prime to use multiple local subcontractors.
  - No bonding requirement for the sub, faster payment, and less red tape, thereby expanding business opportunities for small businesses
  - San Luis Obispo County reviews and approves all Subcontractors prior to issuing Job Orders
  - San Luis Obispo County contracts have subcontractor participation goals
- Increases Transparency
  - San Luis Obispo County 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

# JOC Overview: The Process

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# The Contract Documents



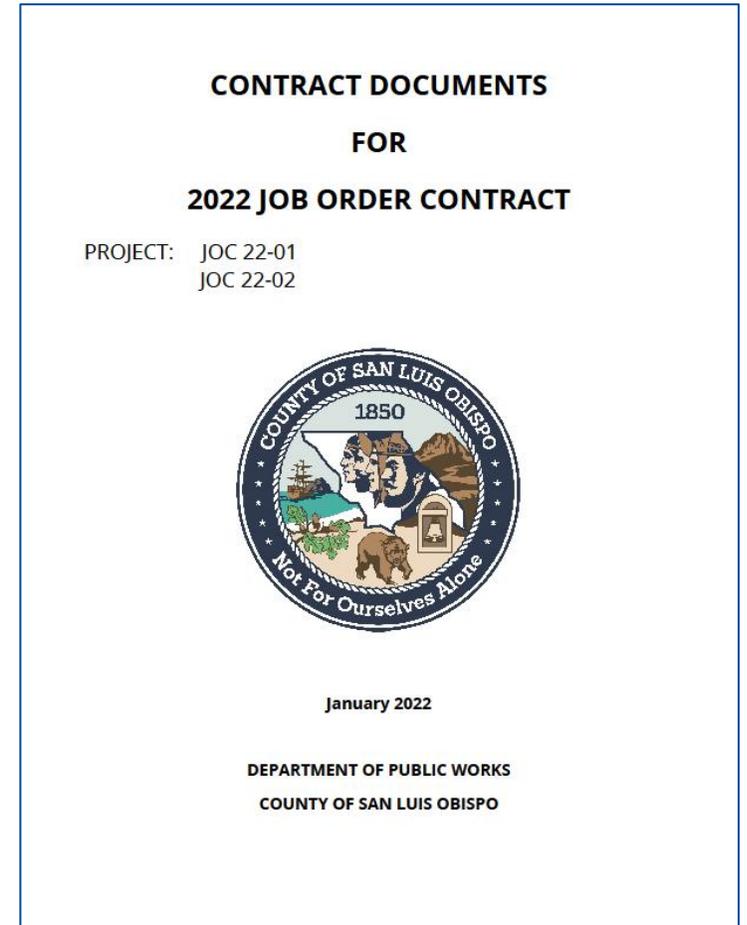
- **Part One:** Instructions and Execution Documents
- **Part Two:** Terms and Conditions
- **Volume III:** The Construction Task Catalog®
- **Volume IV:** The Technical Specifications

# The Contract Documents: Front End Documents



## Part One and Two

- Notice To Contractors
- Contract Conditions
- Bid Forms
- SBE/MVBE/DVBE Requirements
- Etc.



# The Contract Documents: Construction Task Catalog®



## Part Three: The 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



# The Contract Documents: Construction Task Catalog®



## Part Three: The Construction Task 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

**THE GORDIAN GROUP®**

**Using The Construction Task Catalog®**

**About the CTC:**

- ☑ This Construction Task Catalog® (CTC) was developed and customized by The Gordian Group, Inc. specifically for County of San Luis Obispo, Public Works Department, priced locally using current labor, material and equipment costs, and published in December 2021.
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**MasterFormat™**

- ☑ The Tasks in this CTC are organized using CSI's MasterFormat.

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SERVICE MARK OF CSI GROUP OF COMPANIES. ALL RIGHTS RESERVED. © 2021  
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10000 GORDIAN DRIVE, SUITE 100, SAN FRANCISCO, CA 94134

**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 stories and 125' to reach the project site; layout;

**Using The Construction Task Catalog®**

measuring and cutting to fit; performing the Task; disposal of excess material, and time for lunch and breaks.

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- ☑ 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

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County of San Luis Obispo, Public Works Department, 2021 Job Order Contract, JOC 21-01 Page 00 - 1

and JOC 21-02

# The Contract Documents: Construction Task Catalog®



MINOR		TOTAL DIRECT		DEMOLITION
CSI	UOM DESCRIPTION	UNIT COST	UNIT COST	UNIT COST
		<b>Exterior Improvements</b>		<b>32</b>
		<b>Bases, Ballasts, And Paving</b>		<b>32 10</b>
		Unit Paving		32 14
				<b>32</b>
<b>32 16</b>	<b>Curbs, Gutters, Sidewalks, And Driveways</b> <small>(32 10)</small>			
<b>32 16 13</b>	<b>Curbs And Gutters</b> <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>			
<b>32 16 13 13</b>	<b>Cast-In-Place Concrete Curbs And Gutters</b> <small>(32 16 13)</small>			
	<small>Note: Includes concrete, forms, rebar, chairs (where necessary), expansion joints.</small>			
<b>32 16 13 13-0001</b>	<b>Concrete Curb, Cast In Place</b> <small>(32 16 13 13)</small>			
	<small>Note: Includes delivered concrete, forms, rebar, chairs (where necessary), expansion joints, finish and curing.</small>			
<b>32 16 13 13-0002</b>	LF 6" X 12" Cast In Place Concrete Curb .....	7.18		3.23
	<i>For Up To 20, Add</i>	4.03		
	<i>For &gt;20 To 50, Add</i>	2.27		
	<i>For &gt;50 To 100, Add</i>	0.88		
	<i>For &gt;500 To 1,000, Deduct</i>	-0.88		
	<i>For &gt;1,000, Deduct</i>	-1.50		
<b>32 16 13 13-0003</b>	LF 6" X 12" Cast In Place Concrete Curb - Radius .....	8.18		3.72
	<i>For Up To 20, Add</i>	4.63		
	<i>For &gt;20 To 50, Add</i>	2.61		
	<i>For &gt;50 To 100, Add</i>	1.01		
	<i>For &gt;500 To 1,000, Deduct</i>	-1.01		
	<i>For &gt;1,000, Deduct</i>	-1.72		

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

# The Contract Documents: Construction Task 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

# The Contract Documents: CalTrans Specific Tasks in the CTC



- 900+ CalTrans specific Tasks were added to the CTC.
- These Tasks are based on CalTrans standard specifications and include the CalTrans item code.
- All unit prices were calculated using local labor, material and equipment costs.
- Including CalTrans specific Tasks makes it easier to prepare and approve Price Proposals, increases administrative efficiency for both Contractors and Owners and results in more work being completed.

GORDIAN®		Custom Standards And Assemblies		50
		CALTRANS Custom Standards And Assemblies	50 89	50
		CALTRANS Construction Performance Requirements	50 89 80	
MINOR CSI UOM DESCRIPTION		TOTAL DIRECT UNIT COST	DEMOLITION UNIT COST	
<b>50 Custom Standards And Assemblies</b>				
<b>50 89 CALTRANS Custom Standards And Assemblies</b> <small>(50)</small>				
<b>50 89 80 CALTRANS Construction Performance Requirements</b> <small>(50 80)</small>				
<small>Note: Refer to www.dot.ca.gov for CALTRANS Standard Plans and Specifications</small>				
<b>50 89 81 CALTRANS DIVISION I - GENERAL PROVISIONS</b> <small>(50 89 81)</small>				
<b>50 89 81 01 PAYMENT</b> <small>(50 89 81)</small>				
<small>Note: Includes equipment mobilization, hauling over 25 miles, overtime, specialty labor, specialty equipment, reimbursables and permits per CALTRANS Standard. See CSI section 01 22 16 00-0001 for Reimbursable fees and permits, 01 22 20 00-0000 for specialty labor, 01 22 23 00-0000 for specialty equipment, 01 71 13 00-0000 for equipment mobilization, 01 74 19 00-0129 for hauling &gt;25 miles.</small>				
50 89 81 01-0001	EA	CALTRANS 999990 MOBILIZATION.....		
<small>Note: (One Time Per Job) See CSI section 01 71 13 00-0000 for mobilization of equipment.</small>				
<b>50 89 82 CALTRANS DIVISION II - GENERAL CONSTRUCTION</b> <small>(50 89 82)</small>				
<b>50 89 82 12 TEMPORARY TRAFFIC CONTROL</b> <small>(50 89 82)</small>				
<small>Note: Includes flagging, apparel, temporary traffic control devices, and equipment for flaggers, must comply with the latest California MUTCD per CALTRANS Standard.</small>				
50 89 82 12-0001	EA	CALTRANS 120110 FLASHING ARROW SIGN.....		
50 89 82 12-0002	EA	CALTRANS 120116 TYPE II BARRICADE.....		
50 89 82 12-0003	EA	CALTRANS 120119 TRAFFIC CONE.....		
50 89 82 12-0004	EA	CALTRANS 120120 TYPE III BARRICADE.....		
50 89 82 12-0005	EA	CALTRANS 120140 BARRICADE (LEFT IN PLACE).....		
50 89 82 12-0006	SF	CALTRANS 120149 TEMPORARY PAVEMENT MARKING (PAINT).....		
50 89 82 12-0007	LF	CALTRANS 120151 TEMPORARY TRAFFIC STRIPE (TAPE).....		
50 89 82 12-0008	SF	CALTRANS 120152 TEMPORARY PAVEMENT MARKING (TAPE).....		
50 89 82 12-0009	LF	CALTRANS 120159 TEMPORARY TRAFFIC STRIPE (PAINT).....		
50 89 82 12-0010	EA	CALTRANS 120165 CHANNELIZER (SURFACE MOUNTED).....		

# The Contract Documents: Construction Task Catalog®



## Understanding the General Rules of the Construction Task Catalog®:

- 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

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**Using The Construction Task Catalog®**

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**CS** CONSTRUCTION SERVICES

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measuring and cutting to fit; performing the Task; disposal of excess material, and time for lunch and breaks.

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# The Contract Documents: Construction Task Catalog®



## Understanding the General Rules of the Construction Task 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

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**MEASURING AND CUTTING TO FIT:**

- ☑ measuring and cutting to fit; performing the Task; disposal of excess material, and time for lunch and breaks.

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# The Contract Documents: Construction Task Catalog®



Understanding the General Rules of the Construction Task Catalog®: Contractors Never Get Paid Separately For the Following

- 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

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**Using The Construction Task Catalog®**

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# The Contract Documents: Non Pre-Priced Tasks



- Contractor must have permission from the County 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
- Contractor is paid the amount in the following formula:

A = The number of hours for each labor classification and hourly rates

B = Equipment costs (other than small tools)

C = Three independent quotes for all materials

**Total Cost for Self-Performed Work = (A+B+C) x Normal Hours Adjustment**

Factor or 1.15 (whichever is less) and (only if A & B cannot be priced out of the CTC)

If the work is to be subcontracted, the Contractor must submit three (3) independent bids from Subcontractors. If three quotes or bids cannot be obtained, the Contractor will provide the reason in writing For the County's approval as to why three quotes cannot be submitted.

D = Subcontractor Costs (supported by three quotes)

**Total Cost of Non-Pre-Priced Task = D x Normal Hours Adjustment Factor or 1.15 (whichever is less)**

# The Contract Documents

COUNTY  
of SAN LUIS  
OBISPO

## Part Four – The Technical Specifications

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



# Solicitation Details

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- Award Based on Competitive Bid
  - Must Bid 4 Adjustment Factors:
    - Normal Working Hours, General Facilities: 7:00 am to 5:00 pm Monday to Friday
    - Other Than Normal Working Hours, General Facilities: 5:00 pm to 7:00 am Monday to Friday, and all-day Saturday, Sunday and County Holidays
    - Normal Working Hours, Secure Facilities : 7:00 am to 5:00 pm Monday to Friday
    - Other Than Normal Working Hours, Secure Facilities : 5:00 pm to 7:00 am Monday to Friday, and all-day Saturday, Sunday and County 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 the Client Cannot:
  - Identify or Commit to any Specific Project or Location
  - Identify or Commit to any Specific CTC Tasks or Quantities

Contract	Contract Type	Minimum Contract Value	Estimated Annual Contract Value	Maximum Total Contract Term	Maximum Value may be increased to legislative limit	Bid Bond	Initial Payment & Performance Bonding (Each)
JOC-22-01	General "B"	\$50,000	\$750,000	1 Year	\$5,185,091	\$25,000	\$750,000
JOC-22-02	General "B"	\$50,000	\$750,000	1 Year	\$5,185,091	\$25,000	\$750,000

# Solicitation Details

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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
- Bid Security: \$25,000

# Solicitation Details

## 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

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

Project Number	Job Order Number	Title	Project Status
02174-007-0182	02174-007-0182-02	Emergency Work - Fireable Park	WIP
02174-007-0182	02174-007-0182-03	Emergency work at 801-802	WIP
02174-007-0182	02174-007-0182-04	WIP	WIP
02174-007-0182	02174-007-0182-05	WIP	WIP
02174-007-0182	02174-007-0182-06	WIP	WIP
02174-007-0182	02174-007-0182-07	WIP	WIP
02174-007-0182	02174-007-0182-08	WIP	WIP
02174-007-0182	02174-007-0182-09	WIP	WIP
02174-007-0182	02174-007-0182-10	WIP	WIP
02174-007-0182	02174-007-0182-11	WIP	WIP
02174-007-0182	02174-007-0182-12	WIP	WIP
02174-007-0182	02174-007-0182-13	WIP	WIP
02174-007-0182	02174-007-0182-14	WIP	WIP
02174-007-0182	02174-007-0182-15	WIP	WIP
02174-007-0182	02174-007-0182-16	WIP	WIP
02174-007-0182	02174-007-0182-17	WIP	WIP
02174-007-0182	02174-007-0182-18	WIP	WIP
02174-007-0182	02174-007-0182-19	WIP	WIP
02174-007-0182	02174-007-0182-20	WIP	WIP

Project Number	Job Order Number	Name	Total \$
02174-007-0182	02174-007-0182-02	Emergency Work - Fireable Park	\$12,507.00
02174-007-0182	02174-007-0182-03	Emergency work at 801-802	\$134,293.07
02174-007-0182	02174-007-0182-04	WIP	\$83,522.00
02174-007-0182	02174-007-0182-05	WIP	\$1,527.00
02174-007-0182	02174-007-0182-06	WIP	\$36,236.25
02174-007-0182	02174-007-0182-07	WIP	\$1,175.00
02174-007-0182	02174-007-0182-08	WIP	\$14,422.00
02174-007-0182	02174-007-0182-09	WIP	\$6,467.00
02174-007-0182	02174-007-0182-10	WIP	\$6,467.00
02174-007-0182	02174-007-0182-11	WIP	\$76,086.00

# 1% Contractor License Fee

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- Access to eGordian<sup>®</sup>, Construction Task Catalog<sup>®</sup>, other proprietary materials
  - Most advanced technology and data in the marketplace.
  - Paperless
  - Efficient
  - Tasks and prices input directly... no fishing through old files and estimating books for costs
- JOC process training
- eGordian<sup>®</sup> software training
- Software support
- Included in the Contractor's Adjustment Factor
  - Consider with the Bid as an Overhead cost
  - 1% of Job Order Price

# Calculating the Adjustment Factors: Method to Calculate

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- **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

# Calculating the Adjustment Factors: Sample Project: Detailed Scope of Work



COUNTY  
of SAN LUIS  
OBISPO

- 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

# Calculating the Adjustment Factors: Sample Project: Price Proposal



**Contractor's Price Proposal Detail - Category**

Date: February 05, 2012  
 Contract Number: 000001  
 Work Order Number: 000001-2014-0001  
 Work Order Title: 000001-2014-0001  
 Contractor: The Gordian Group  
 Proposal Value: \$74,754.78  
 Proposal Name: Florida Sample Renovation

Code	Unit	Qty	Unit Price	Factor	Total
1	EA	1	\$74,754.78	1.0000	\$74,754.78

## Contractor's Price Proposal Summary - Category

<b>Work Order #:</b>	000001 Florida 2014
<b>Title:</b>	Florida Sample Renovation
<b>Contractor:</b>	The Gordian Group
<b>Proposal Value:</b>	\$66,344.12
<b>Proposal Name:</b>	Florida Sample Renovation
<b>Boiler:</b>	\$33,055.73
<b>Doors and Hardware:</b>	\$8,282.09
<b>Lighting:</b>	\$13,119.77
<b>Plumbing:</b>	\$11,886.53
<b>Work Order Proposal Total</b>	<b>\$66,344.12</b>

Code	Unit	Qty	Unit Price	Factor	Total
100	EA	1	\$33,055.73	1.0000	\$33,055.73
101	EA	1	\$8,282.09	1.0000	\$8,282.09
102	EA	1	\$13,119.77	1.0000	\$13,119.77
103	EA	1	\$11,886.53	1.0000	\$11,886.53
<b>Total</b>					<b>\$66,344.12</b>

Code	Unit	Qty	Unit Price	Factor	Total
100	EA	1	\$33,055.73	1.0000	\$33,055.73
101	EA	1	\$8,282.09	1.0000	\$8,282.09
102	EA	1	\$13,119.77	1.0000	\$13,119.77
103	EA	1	\$11,886.53	1.0000	\$11,886.53
<b>Total</b>					<b>\$66,344.12</b>

**Subtotal for Category - Lighting:** \$13,119.77

**Category - Plumbing:** \$11,886.53

Contract Proposal Detail - Category Page 8 of 8 2/5/2012

Contract Proposal Detail - Category Page 8 of 8 2/5/2012

# Calculating the Adjustment Factors: 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

# Calculating the Adjustment Factors: 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
•	<b>Adjustment Factor (= E / F) = 1.1855</b>	

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

Prepare this calculation for more than one sample project.

# Filling Out the Bid Form 1 2 6 8 5



1. **Normal Working Hours:** Undersigned shall perform any or all functions called for during Normal Working Hours on Projects in General Facilities for the Unit Prices specified in the Construction Task Catalog® (CTC) multiplied by the Adjustment Factor of:

1 . 1 8 5 5

*(Specify to four (4) decimal places)*

*One point one eight five five*

*(Specify in words)*

Note that no Adjustment Factor may be less than factor 2.a.1. for Projects in General Facilities to be performed during Normal Working Hours.

2. **Other Than Normal Working Hours:** Undersigned shall perform any or all functions called for during Other Than Normal Working Hours on Projects in General Facilities for the Unit Prices specified in the Construction Task Catalog® (CTC) multiplied by the Adjustment Factor of:

1 . 2 0 3 4

*(Specify to four (4) decimal places)*

*One point two zero three four*

*(Specify in words)*

Note that no Adjustment Factor may be less than factor 2.a.1. for Projects in General Facilities to be performed during Normal Working Hours.

\* Sample only

# Filling Out the Bid Form



## b. Projects in Secure Facilities

1. **Normal Working Hours:** Undersigned shall perform any or all functions called for during Normal Working Hours on Projects in Secure Facilities for the Unit Prices specified in the Construction Task Catalog® (CTC) multiplied by the Adjustment Factor of :

1 . 2 5 0 0

*(Specify to four (4) decimal places)*

One point two five zero zero

*(Specify in words)*

Note that no Adjustment Factor may be less than factor 2.a.1. for Projects in General Facilities to be performed during Normal Working Hours.

2. **Other Than Normal Working Hours:** Undersigned shall perform any or all functions called for during Other Than Normal Working Hours on Projects in Secure Facilities for the Unit Prices specified in the Construction Task Catalog® (CTC) multiplied by the Adjustment Factor of:

1 . 2 9 0 0

*(Specify to four (4) decimal places)*

One point two nine zero zero

*(Specify in words)*

Note that no Adjustment Factor may be less than factor 2.a.1. for Projects in General Facilities to be performed during Normal Working Hours.

# Filling Out the Bid Form



		Enter Factor carried out Four (4) decimal places					
		1	.	0	8	5	0
Line 1	Enter <i>Normal Working Hours for Projects in General Facilities Adjustment Factor</i> from prior page in column to right →	1	.	1	8	5	5
Line 2	Multiply Line 1 Adjustment Factor by 55% = (0.55 x Line 1) and enter in column to the right →	0	.	6	5	2	0
Line 3	Enter <i>Other than Normal Working Hours for Projects in General Facilities Adjustment Factor</i> from prior page in column to right →	1	.	2	0	3	4
Line 4	Multiply Line 3 by 25% = (0.25 x Line 3) and enter in column to right →	0	.	3	0	0	9
Line 5	Enter <i>Normal Working Hours for Projects in Secure Facilities</i> from prior page in column to right →	1	.	2	5	0	0
Line 6	Multiply Line 5 by 10% = (0.10 x Line 5) and enter in column to right →	0	.	1	2	5	0
Line 7	Enter <i>Other Than Normal Working Hours for Projects in Secure Facilities Adjustment Factor</i> from prior page to column to right →	1	.	2	9	0	0
Line 8	Multiply Line 7 by 10% = (0.10 x Line 7) and enter in column to right →	0	.	1	2	9	0
		<b>ACF</b>					
Line 9	<b>Award Criteria Figure (ACF)</b> equals the sum of Lines 2, 4, 6, and 8. Add together: (Line 2 + Line 4 + Line 6 + Line 8) and enter total (sum) in column to right →	1	.	2	0	6	9

# Bid Considerations

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- 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 to Pay 1% of each Job Order as a Contractor License Fee for eGordian<sup>®</sup> software access**

# Bid Considerations: 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

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

# Bid Considerations: 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
  - Lost Profitability
- No Second Chance to Improve your Margin

# Review of Key Points

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- Focus on Total Potential Value of Contract
  - \$750,000
- Evaluate Construction Task Catalog<sup>®</sup>
  - 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

# Bid Submission

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- Complete and submit the following as your Bid:
  1. Bid Form
  2. Designation of Insurance Company and Insurance Agent/Broker
  3. Designation of Surety
  4. Bidder's Non-Collusion Declaration (State Form)
  5. Iran Contracting Act Certification
  6. Bidder's Bond

# Bid Submission

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- All bids must be addressed to County of San Luis Obispo, and delivered to:  
County Clerk  
County Government Center  
1055 Monterey Street, Suite D120 (1st. Floor)  
San Luis Obispo, CA 93408
- Sealed Bids should bear the Project Title, Project Number and Name of the Bidder.

# Bid Submission: Questions

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- Make Sure you Signed the Pre-bid Sign-In Sheet
- All questions concerning this solicitation must be made in writing through the Purchasing website no less than five (5) business days prior to the bid opening.
- Bids due : Thursday, February 24, 2022, by 3:00 PM
  - Contract Documents are available for download free of charge at:  
[http://www.slocounty.ca.gov/GS/Purchasing/Current Formal Bids and Proposals.htm](http://www.slocounty.ca.gov/GS/Purchasing/Current%20Formal%20Bids%20and%20Proposals.htm)