

DEPARTMENT OF PUBLIC WORKS

JOB ORDER CONTRACTING FACILITIES

JOC 21-01 & 21-02

Mandatory Pre-Bid Meeting

January 21, 2021

1:30 PM



Pre-Bid Conference Agenda



- San Luis Obispo Public Works 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

JOC Overview



- A Job Order Contract Is a Firm, Fixed Priced, Competitively Bid, Indefinite Quantity Contract
 - JOC Is Designed to Accomplish Small-medium Size, Multi-trade, Minor Construction, Repair and Remodel Projects
 - JOC Is a Series of Individual Projects Issued As Job Orders Under the Base Contract
- A Fundamentally Different Construction Procurement Relationship
 - Performance-Based Contract
- Non-adversarial relationship between Owner & Contractor
- Future Purchase Orders Tied to Contractor Performance
 - No Obligation To Award Specific Projects
- The County can Use All Other Methods For Accomplishing Projects
- JOC Introduced in the United States in 1985 (Dept. of Defense, USPS, NASA, etc.)
- Implemented by states, counties, cities, universities, housing authorities, etc. since 1990
- Hundreds of contracts currently in use
- Over \$1.4 Billion in construction placed annually through Gordian JOC systems

County JOC Overview



- 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: 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



- 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 the County
 - Good work is rewarded with more work
 - Develop partnership with the 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



- 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



- 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
 - The County can Use All Other Methods For Accomplishing Projects

JOC Overview: Why JOC Works For Facility Owners



- 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
 - The County reviews and approves all Subcontractors prior to issuing Job Orders
 - All County contracts have subcontractor participation goals
- Increases Transparency
 - The 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

Solicitation Details



- Award Based on Competitive Bid
 - Must Bid 4 Adjustment Factors:
 - General Facilities Normal Working Hours: 7:00 am to 5:00 pm Monday to Friday
 - General Facilities Other Than Normal Working Hours: 5:00 pm to 7:00 am Monday to Friday, and all day Saturday, Sunday and County Holidays
 - Secure Facilities Normal Working Hours: 7:00 am to 5:00 pm Monday to Friday
 - Secure Facilities Other Than Normal Working Hours: 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
 - No Adjustment Factor may be less than the first Adjustment Factor for Projects in General Facilities to be performed during Normal Working Hours.

Solicitation Details



- Prior to Bidding the County 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	Maximum Contract Value	Contract Term	Maximum Value may be increased to legislative limit	Bid Bond	Payment & Performance Bonding (Each)
JOC-21-01	General Construction	\$50,000	\$750,000	1 Year	\$5,086,051	\$25,000	\$750,000
JOC-21-02	General Construction	\$50,000	\$750,000	1 Year	\$5,086,051	\$25,000	\$750,000

Maintenance Bond Required: Equal to 5% of the Maximum Contract Value

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
- **Bid Security: \$25,000**

Solicitation Details

COUNTY
of SAN LUIS
OBISPO

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 top navigation bar includes 'eGordian®', 'Apps', 'Tools', 'eRQC+', 'Videos', and 'Help'. The current company is identified as 'County of San Luis Obispo'. The main content area is divided into two panels: 'Job Orders' and 'Price Proposal List (Beta)'. Both panels feature search filters, 'New' buttons, and 'Grouping' options. The 'Job Orders' panel shows a table with columns for Project Number, Job Order Number, Title, and Project Status. The 'Price Proposal List' panel shows a table with columns for Project Number, Job Order Number, Name, and Total \$.

Project Number	Job Order Number	Title	Project Status
56214-467-0186	56214-467-0186-00	Emergency Work - Firearm Park	WIP
56912-460-0152	56912-460-0152	Stormwater work at 801-8613 Service	
56214-467-0142	56214-467-0142-00	SPS	Closed Out
56214-463-0007	56214-463-0007-00	Stormwater File Station Signs	WIP
56914-FWP-0007	56914-FWP-0007	Luckville Trailer	Proposed
56914-TSL-0144	56914-TSL-0144-00	Service Call #16	WIP
56914-LEO-0008	56914-LEO-0008-00	Boys' & Girls' job site painting work	WIP
56214-463-0008	56214-463-0008-00	County Mts. Recreational Viewing Area Maintenance	Contractor Complete
56214-463-0008	56214-463-0008-00	Newsville P2	WIP
56214-463-0008	56214-463-0008-00	Star11 Center Laundry Stock Inventory	Under Construction

Project Number	Job Order Number	Name	Total \$
56214-467-0186	56214-467-0186-00	Emergency Work - Firearm Park	\$11,507.00
56912-460-0152	56912-460-0152	Stormwater work at 801-8613 Service	\$124,260.07
56914-FWP-0007	56914-FWP-0007	Luckville Trailer Work	\$61,622.00
56214-463-0008	56214-463-0008-00	Newsville P2	\$1,207.46
56914-FWP-0008	56914-FWP-0008	Coordinator of Building Utilities - Mission St. Church Turn Lane	\$38,000.00
56914-LEO-0008	56914-LEO-0008	Emergency Response Work (JMS/TL)	\$1,175.00
56914-463-0045	56914-463-0045	Repair Work at 1601-176	\$14,622.50
56914-463-0008	56914-463-0008	Misc. Stormwater Repair - Mission St/County	\$6,467.46
56914-463-0008	56914-463-0008-01	Misc. Stormwater Repair - Mission St/County	\$6,467.46
56214-467-0116	56214-467-0116	Newsville Fire Station #60 - Replacement of existing and adding of the existing work	\$76,000.00

1% Contractor License Fee

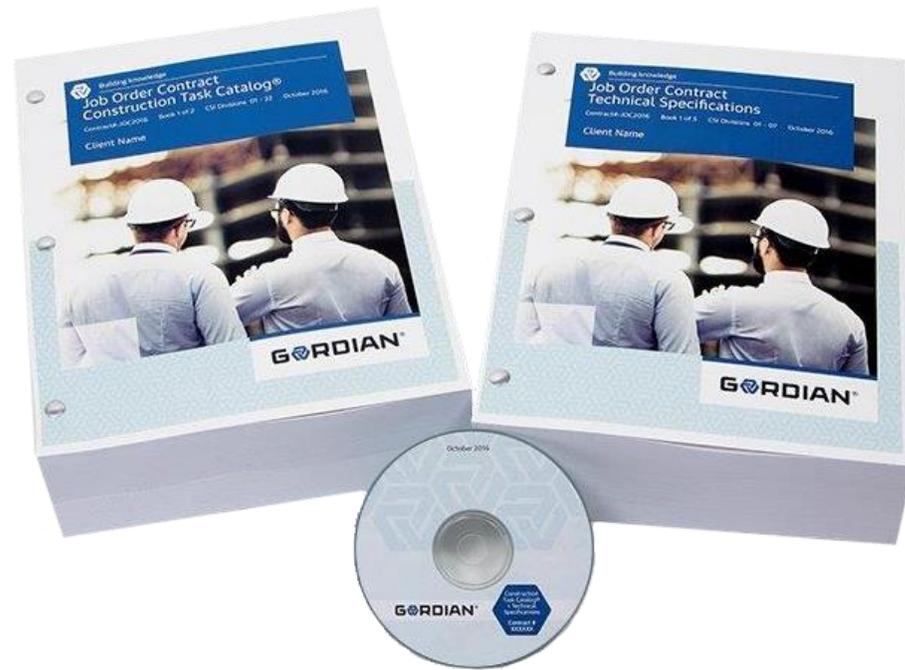


- Access to eGordian[®], Construction Task Catalog[®], other proprietary materials
 - Most advanced technology and data in the marketplace.
 - Paperless
 - Efficient
 - Tasks and prices input directly... no fishing through old files and estimating books for costs
- JOC process training
- eGordian[®]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

JOC Overview: The Process



The Contract Documents



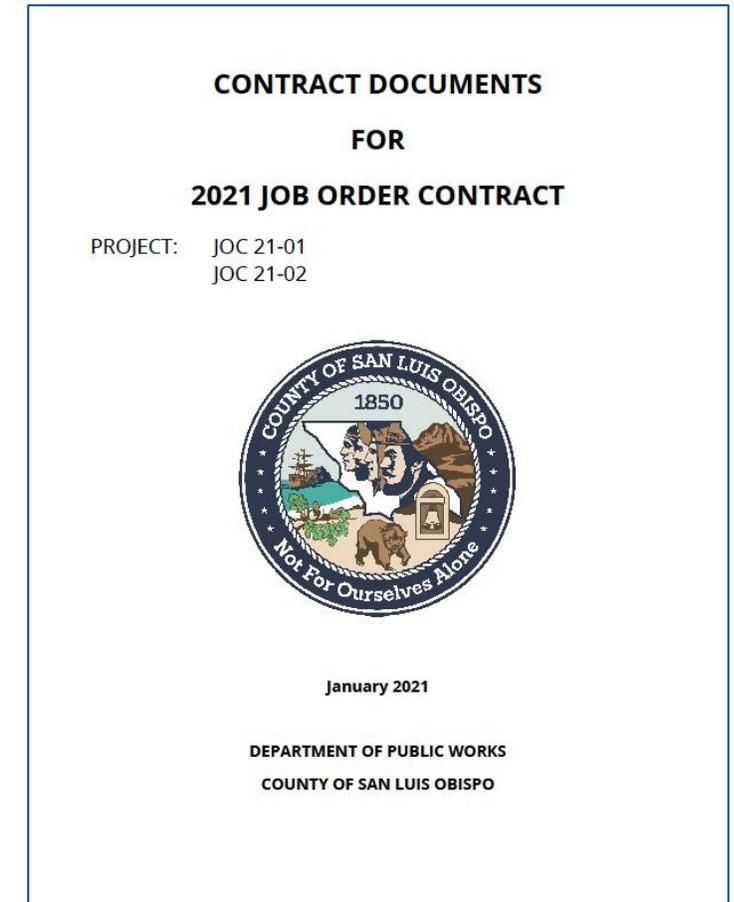
- **Part One:** Instructions and Execution Documents
- **Part Two:** Terms and Conditions
- **Volume III:** The Construction Task Catalog®
- **Volume IV:** The Technical Specifications

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 January 2021.
- ☑ 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 County of San Luis Obispo, Public Works Department. 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 CTC are organized using CSI's MasterFormat.

CSi
MasterFormat® is published jointly by CSI and Construction Specifications Canada (CSC) in U.S. and Canada. 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 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.

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

January 2021
County of San Luis Obispo, Public Works Department, 2021 Job Order Contract, JOC 21-01 and JOC 21-02

copyright © 2020 The Gordian Group, Inc.
Page 00 - 1

The Contract Documents: Construction Task Catalog®



Exterior Improvements	32	
Bases, Ballasts, And Paving	32 10	32
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> 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'.		
32 16 13 13		Cast-In-Place Concrete Curbs And Gutters <small>(32 16 13)</small> Note: Includes concrete, forms, rebar, chairs (where necessary), expansion joints.		
32 16 13 13-0001		Concrete Curb, Cast In Place <small>(32 16 13 13)</small> Note: Includes delivered concrete, forms, rebar, chairs (where necessary), expansion joints, finish and curing.		
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

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	
50 Custom Standards And Assemblies				
50 89 CALTRANS Custom Standards And Assemblies ⁽⁵⁰⁾				
50 89 80 CALTRANS Construction Performance Requirements ^(50 80)				
Note: Refer to www.dot.ca.gov for CALTRANS Standard Plans and Specifications				
50 89 81 CALTRANS DIVISION I - GENERAL PROVISIONS ^(50 89 81)				
50 89 81 01 PAYMENT ^(50 89 81)				
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 >25 miles.				
50 89 81 01-0001	EA	CALTRANS 999990 MOBILIZATION.....		
Note: (One Time Per Job) See CSI section 01 71 13 00-0000 for mobilization of equipment.				
50 89 82 CALTRANS DIVISION II - GENERAL CONSTRUCTION ^(50 89 82)				
50 89 82 12 TEMPORARY TRAFFIC CONTROL ^(50 89 82)				
Note: Includes flagging, apparel, temporary traffic control devices, and equipment for flaggers, must comply with the latest California MUTCD per CALTRANS Standard.				
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

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 January 2021.
- ☑ 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 County of San Luis Obispo, Public Works Department. 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 CTC are organized using CSI's MasterFormat.

CSi
ANALYSIS AND CONSULTING
CONSTRUCTION DIVISION
1915 W. 15th Street, Suite 100
Berkeley, CA 94710
www.csi.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 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.

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

January 2021

Copyright © 2020 The Gordian Group, Inc.

County of San Luis Obispo, Public Works Department, 2021 Job Order Contract, JOC 21-01 and JOC 21-02

Page 00 - 1

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

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 January 2021.
- ☑ 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 County of San Luis Obispo, Public Works Department. 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 CTC are organized using CSI's MasterFormat.

CSI MasterFormat is a product jointly developed by CSI and Construction Specifications Canada (CSCA). Copyright is held by CSI and Construction Specifications Canada (CSCA). 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 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.

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

January 2021

Copyright © 2020 The Gordian Group, Inc.

County of San Luis Obispo, Public Works Department, 2021 Job Order Contract, JOC 21-01 and JOC 21-02

Page 00 - 1

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

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 January 2021.
- ☑ 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 County of San Luis Obispo, Public Works Department. 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 CTC are organized using CSI's MasterFormat.

CSI MasterFormat is a product used by CSI and Construction Specifications Canada (CSI) in U.S. and Canada. 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 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.

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

January 2021
County of San Luis Obispo, Public Works Department, 2021 Job Order Contract, JOC 21-01 and JOC 21-02

copyright © 2020 The Gordian Group, Inc.
Page 00 - 1

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 (Only if A & B cannot be priced out of the CTC)

D = Subcontractor Costs (supported by three quotes)

Total Costs of Non Pre-priced Task = D x Normal Hours Adjustment Factor

Total Cost of Non Pre-Priced Task = (A + B + C + D)

The Contract Documents



Part Four – The Technical Specifications

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



Calculating the Adjustment Factors: Method to Calculate



- **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



- 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



Job Order Contract Contractor's Price Proposal Summary- Category

Job Order #:: DCHA1.00
 Title: Sample Price Proposal
 Contractor: 123 Contracting
 Proposal Value: \$89,491.65
 Proposal Name: Sample Price Proposal

To: Project Manager	From: Contractor Project Manager
Boiler:	\$48,911.43
Doors & Hardware:	\$9,748.46
Lighting:	\$15,845.00
Plumbing:	\$14,986.76
Project Proposal Total	\$89,491.65

This price proposal - all information and data - shall not be duplicated, used, or disclosed in whole or in part for any purpose other than to evaluate this price proposal. This price proposal - all information and data - is Confidential and

Contractor's Price Proposal Detail - Category

Date: February 05, 2012
 Contract Number: PPA-0345
 Work Order Number: 060229-12-PPB000
 Work Order Title: 060229-12-Pre-Bid Project
 Contractor: The Number Group

Line	Description	Unit	Price	Factor	Total
1	Boiler	EA	48911.43	1.0000	48911.43
2	Doors & Hardware	EA	9748.46	1.0000	9748.46
3	Lighting	EA	15845.00	1.0000	15845.00
4	Plumbing	EA	14986.76	1.0000	14986.76
5	Total				89491.65

Line	Description	Unit	Price	Factor	Total
6	Boiler	EA	48911.43	1.0000	48911.43
7	Doors & Hardware	EA	9748.46	1.0000	9748.46
8	Lighting	EA	15845.00	1.0000	15845.00
9	Plumbing	EA	14986.76	1.0000	14986.76
10	Total				89491.65



Calculating the Adjustment Factors: Sample Price: CTC vs. Quote



COUNTY
of SAN LUIS
OBISPO

Direct Cost of Work from CTC

- Replace Boiler \$ 48,911.43
- Doors/Hardware \$ 9,748.46
- Lighting \$ 15,845.00
- Plumbing \$ 14,986.76

TOTAL = \$ 89,491.65

Direct Cost of Work from Quotes or Estimates

- Replace Boiler \$ 47,500.00
- Doors/Hardware \$ 9,250.00
- Lighting \$ 16,750.00
- Plumbing \$ 12,500.00

TOTAL = \$ 89,000.00

Calculating the Adjustment Factors: Sample Price: Putting it all together



• A.	Direct Cost of Work from Quotes	\$89,000.00
• B.	Overhead 10%*	<u>\$ 8,900.00</u>
• C.	Subtotal (Cost & O/H)	\$97,900.00
• D.	Profit 10%*	<u>\$ 9,790.00</u>
• E.	Subtotal (Cost & O/H & Profit)	\$107,690.00
• F.	Price From CTC	\$89,491.65
•	Adjustment Factor (= E / F) = 1.2034	

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

Prepare this calculation for more than one sample project.

Filling Out the Bid Form



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	.	2	7	0	0
---	---	---	---	---	---

(Specify to four (4) decimal places)

(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	9	0	0
---	---	---	---	---	---

(Specify to four (4) decimal places)

(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



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 0 3 4

(Specify to four (4) decimal places)

(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 5 0 0

(Specify to four (4) decimal places)

(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



AWARD CRITERIA FIGURE FORMULA

		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	.	2	7	0	0
Line 2	Multiply Line 1 Adjustment Factor by 55% = (0.55 x Line 1) and enter in column to the right →	0	.	6	9	8	5
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	9	0	0
Line 4	Multiply Line 3 by 25% = (0.1205 x Line 3) and enter in column to right →	0	.	3	2	2	5
Line 5	Enter <i>Normal Working Hours for Projects in Secure Facilities</i> from prior page in column to right →	1	.	2	0	3	4
Line 6	Multiply Line 5 by 10% = (0.10 x Line 5) and enter in column to right →	0	.	1	2	0	3
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	5	0	0
Line 8	Multiply Line 7 by 10% = (0.10 x Line 7) and enter in column to right →	0	.	1	2	5	0
		ACF					
Line 9	Award Criteria Figure (ACF) 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	6	6	3

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 and Staff
 - Hold Required Licenses
 - **Contractor to Pay 1% of each Job Order as a Contractor License Fee for eGordian[®] 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

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

Bid Considerations: 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
 - \$750,000
- 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

Bid Submission



- 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. Bidders Non-Collusion Declaration
 5. Iran Contracting Act Certification
 6. Bidders Bond

Bid Submission



- Sealed bids due: Thursday, February 11, 2021 at 3:00 PM

County Clerk
County Government Center
1055 Monterey Street, Suite D120 (1st Floor)
San Luis Obispo, CA 93408

- ONE (1) fully executed paper bid document
- The bid number, Project Title, Project Number and company name must be included on the outside of your sealed package and failure to do so may result in the inadvertent opening of the package and may cause your bid to be rejected.
- Bids are to be submitted in separate sealed envelopes. Envelopes shall be marked in lower left corner “Bid for JOC 20-01” or “Bid for JOC 20-02.”

Contract Documents



- 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)

Bid Submission: Questions



- All questions concerning this solicitation must be submitted in writing through the Purchasing website. Questions and answers will be posted on the Purchasing website and can be viewed there.
- Submit questions through the Purchasing website no later than five (5) business days prior to the bid opening date.
- Bids due : Thursday, February 11, 2021 at 3:00 PM