

County of San Mateo

Job Order Contracting Pre-bid Conference

November 17, 2022

General Construction JOC-2301, JOC-2302, JOC-2303, JOC-2304 & JOC-2305

Mechanical Works JOC-2306, JOC-2307 & JOC-2308

Roofing JOC-2309 & JOC-2310

Flooring JOC-2311 & JOC-2312

Plumbing JOC-2313 & JOC-2314

Electrical/ Lighting JOC-2315 & JOC-2316

Painting JOC-2317 & JOC-2318

Hazardous Materials JOC 2319, JOC-2320 & JOC-2321





Pre-Bid Conference Agenda

- Introductions
- JOC Overview
- JOC Process
- JOC Contract Documents
- Solicitation Details
- Understanding the Construction Task Catalog® (CTC)
- Contractor Adjustment Factors
- Risk of Low Adjustment Factors
- Calculating the Bid
- Bid Considerations
- Bid Specifics
- Questions

Introduction



The County of San Mateo Has Advertised:

- Five (5) JOC Contracts for B License General Construction with a potential maximum value of \$5,000,000
- Three (3) JOC Contracts for C-20 License Mechanical Works with a potential maximum value of \$5,000,000
- Two (2) JOC Contracts C-39 License Roofing with a potential maximum value of \$2,000,000
- Two (2) JOC Contracts C-15 License Flooring with a potential maximum value of \$2,000,000
- Two (2) JOC Contracts C-36 License Plumbing with a potential maximum value of \$2,000,000
- Two (2) JOC Contracts C-10 License Electrical/ Lighting with a potential maximum value of \$2,000,000
- Two (2) JOC Contracts C-33 Painting with a potential maximum value of \$1,000,000
- Two (2) JOC Contracts C-21 Demolition w/ HazMat Certification with a potential maximum value of 3,000,000(to be confirmed)

Work Will Be Issued Under the Job Order Contracting Program

Work Will Be Administered Through The County of San Mateo's Department of Public Works

Gordian® Trains and Supports the County of San Mateo and JOC Contractors

Job Order Contracting



Definition

- Fixed Priced, Indefinite Quantity, Competitively Bid Contract
- 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 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

Step 1



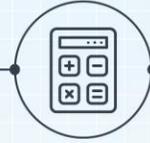
Joint Scope Meeting

Step 2



Detailed Scope of Work

Step 3



Price Proposal

Step 4



Price Proposal Review

Step 5



Purchase Order Issued



Construction Starts

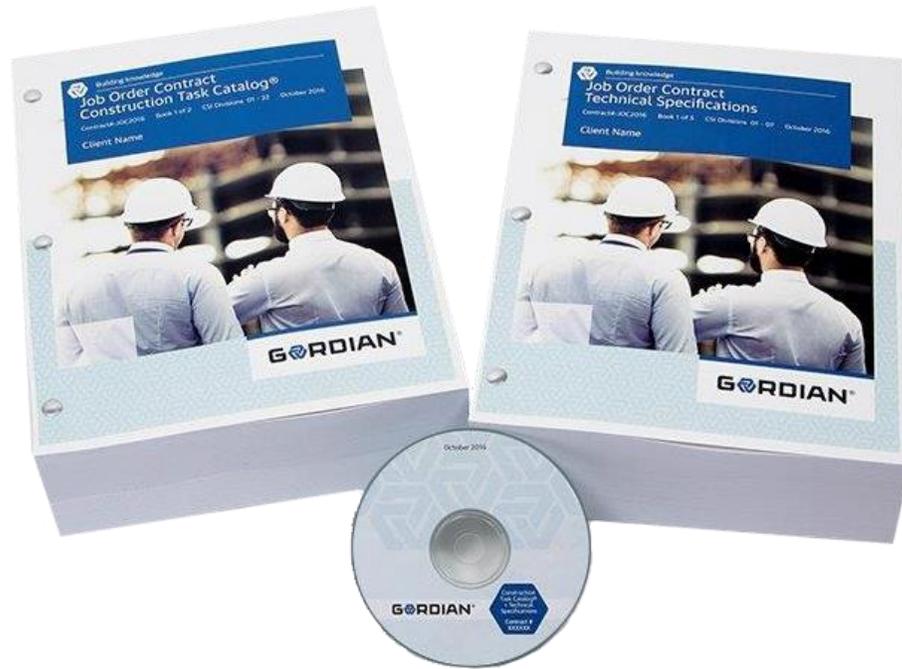
JOC Process



JOC Benefits

- Simplifies the procurement process
- Responsive Services
- Improves the quality of work
- Increases local subcontractor participation
- Volume is driven by performance
- Develop partnership with Owner
- Reduced Risk & increases transparency
- A Fixed Priced, Fast Track Procurement Process
 - Eliminates pricing negotiations
- No Shelf Life for Prices or Job Orders
- The JOC process allows for a higher percentage of projects to be delivered on time and within budget

Contract Documents



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

Front End Documents



Project Manual

- Bidding Requirements
- Notice to Bidders
- Instruction to Bidders
- Bid Form
- Contract Requirements
- Agreement
- Bonds and Insurance
- General Conditions
- Supplemental Conditions
- General Requirements
- Payment Procedures
- Close-out Procedures

JOC Specific Clauses

- Overview of Contract
- Procedure for Ordering Work
- Proposal Preparation
- Issuing Work

Other Clauses to Change

- Scope of Work
- Extra Work
- Time Extensions
- Liquidated Damages
- Substantial Completion

Construction Task Catalog®



- Catalog of Pre-Priced Construction Tasks
- Based on Local Labor, Material & Equipment Costs
- Unit prices are for Direct Cost of Construction only
- The tasks represent the “Scope of Work” for the contract
- Items that list manufacturer and model number are to specify quality and must be used as equal instead of Non-Prepriced items



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 2017.
- ❑ 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.

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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 2017
Owner

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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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- ☑ Profit.

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Sample Bid Note 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

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Sample Bid Note 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

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Sample Bid Note Page 00 - 1

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

Understanding the Construction Cost Catalog®



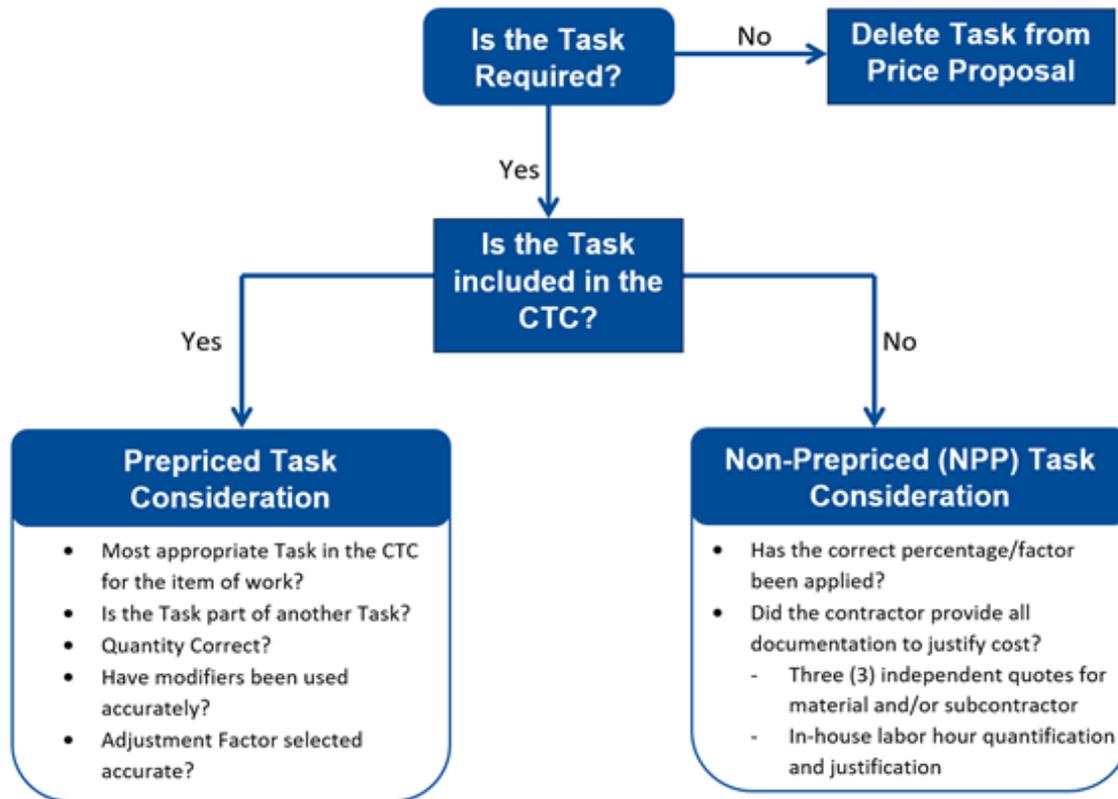
Include All Appropriate Tasks:

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

Non Pre-Priced Tasks



- Contractor must have permission from Santa Clara County FAF to use a Non-Prepriced Task prior to submission
- Three (3) Quotes on vendors' or subcontractors' letterhead
- Justification for less than three (3) Quotes
- Contractor is paid a Maximum of 4% added to the Adjustment Factor for 'General Facilities Other than Normal Working Hours'.

Non Pre-Priced Tasks



- Contractor must have permission from Santa Clara County HS 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 formula indicated:

Contractor Performed Duties

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 (Max of 4% added to the Adjustment Factor for OSHPD 1 Other than Normal Working Hours)**
(Only if A & B cannot be priced out of the CTC)

For Work performed by Subcontractors:

If the Work is to be subcontracted, the Contractor must submit three 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 Costs of Non Pre-Priced Task = D x (Max of 4% added to the Adjustment Factor for OSHPD 1 Other than Normal Working Hours)

Technical Specifications



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



JOC Software



Email address

Password

Remember me

[Change password](#) [Forgot password?](#)

Trouble logging in? Contact Customer Support at:
800-448-8182 or
gordiansupport@gordian.com

Welcome to Gordian

As we all work to mitigate the impact of COVID-19, Gordian remains normally – from 8 a.m. to 10 p.m. EST, and our technology platform us at 800-448-8182 or gordiansupport@gordian.com.

Gordian: Solving Complex Challenges with Innovative Solutions

Gordian's unique approach combines the right data, software and ex results.

Explore our solutions:

Job Order Contracting (JOC) Utilize an Indefinite Delivery Indefinite Quantity (IDIQ) construction delivery method that allows many projects to be completed through a single, competitively-awarded contract.	eziQC® Leverage the efficient purchasing networks through the power of contract.
Sightlines Assessment & Planning Go beyond the traditional Facilities Condition Assessment to create an actionable investment plan that aligns project selection with your goals.	Sightlines Return Get the data, context recommendations ne effectively.

Internet Based Software Provided with Contract

- eGordian® Expedites the Job Order Process
 - Price Proposals
 - Subcontractor Lists
 - Tracking Dates
- Training provided

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[®] training
- Software support
- Included in the Contractor's Adjustment Factor
 - Consider with the Bid as an Overhead cost
 - 1% of Job Order Price

Solicitation Details



Contract	Contract license required	Minimum Contract Value	Maximum Contract Value	Contract Term	Initial Payment & Performance Bonding (Each)
JOC-2301- 2305	B - General Building	\$0	\$5,000,000	1 Year	\$1,000,000
JOC-2306-2308	C20 – Mechanical Works (C-4, C-36, C-38, C-43 Preferred)	\$0	\$5,000,000	1 Year	\$1,000,000
JOC-2309, 2310	C39 - Roofing	\$0	\$2,000,000	1 Year	\$250,000
JOC-2311, 2312	C15 - Flooring	\$0	\$2,000,000	1 Year	\$250,000
JOC-2313, 2314	C-36 - Plumbing	\$0	\$2,000,000	1 Year	\$250,000
JOC-2315, 2316	C-10 - Electrical/ Lighting	\$0	\$2,000,000	1 Year	\$250,000
Painting (JOC 2317, 2318)	C-33 – Painting	\$0	\$1,000,000	1 Year	\$250,000
Hazardous Materials (JOC 2319, 2320, 2321)	C-21 – Demolition with HazMat Certification	\$0	\$3,000,000 (to be confirmed)	1 Year	\$250,000



Payment and Performance Bonds will be increased to not less than 100% of the Max Contract Value if Collective Job Orders exceed the initial bonding



Questions?

Part II: Bid Factors & Considerations

Adjustment Factors



What is an Adjustment Factor?

- The Contractor's competitively bid or negotiated adjustment to be applied to the Unit Prices listed in the CTC
- Contractor's bid factor is used to determine lowest bid
- Adjustment Factors are fixed for the duration of the contract term
- The same adjustment factor apply to all tasks in the CTC
- Adjustment factors must include all indirect costs and profit

Adjustment Factors



Adjustment Factors include (but not limited to):

- All overhead, profit and taxes for the contractor and subcontractor
- Prep and modifications of proposals
- Office trailers and portable toilets
- Construction vehicles and storage devices
- All PPE
- Daily and final clean-up
- Protection of all surfaces
- Site Supervision and management meetings

Refer to “Understanding the Construction Cost Catalog®” document for comprehensive list of Inclusions

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

Create a Representative Project

- Create a Scope of Work
- Get Sub Quotes or Estimate Cost
- Price Project From CTC
- Add on Overhead and Profit
- Calculate the Adjustment Factor

Proposal Building Example Project

- **Select multiple projects that you are familiar with based on your trade**

- Doors and Hardware
- Interior Lighting
- Plumbing Fixtures
- Replace Boiler
- Include any exclusions
- **Normal Working Hours Apply**



Sample Price: CTC vs. Quote



Direct Cost of Work from CTC

- Replace Boiler \$ 48,911.43
- Doors and 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 and Hardware \$ 9,250.00
- Lighting \$ 16,750.00
- Plumbing \$ 12,500.00

TOTAL = \$ 89,000.00

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



BID SCHEDULE:

General Facilities Normal Working Hours: Work performed during Normal Working Hours, in General Facilities, in the quantities specified in individual Job Orders for the Unit Price sum specified in the Construction Task Catalog multiplied by the Adjustment Factor of:

1 . 2 0 3 4

General Facilities Other than Normal Working Hours*: Work performed during Other Than Normal Working Hours, in General Facilities, in the quantities specified in individual Job Orders for the Unit Price sum specified in the Construction Task Catalog multiplied by the Adjustment Factor of:

1 . 2 6 5 0

Detention Facilities Normal Working Hours:** Work performed during Normal Working Hours, in Detention Facilities, in the quantities specified in individual Job Orders for the Unit Price sum specified in the Construction Task Catalog multiplied by the Adjustment Factor of:

1 . 3 0 0 0

Detention Facilities Other than Normal Working Hours: Work performed during Other Than Normal Working Hours, in Detention Facilities, in the quantities specified in individual Job Orders for the Unit Price sum specified in the Construction Task Catalog multiplied by the Adjustment Factor of:

1 . 3 8 0 0

Non Pre-priced: Work required by the Detailed Scope of Work but not included in the Construction Task Catalog® multiplied by the Adjustment Factor. **Maximum of 4% added to the Adjustment Factor for 'General Facilities Other than Normal Working Hours'.**

1 . 3 1 5 6

Filling Out the Bid Form



Line 1	General Facilities Normal Working Hours Adjustment Factor	1. 1.2034
Line 2	Multiply Line 1 by 65% =	2. 0.7822
Line 3	General Facilities - Other than Normal Working Hours Adjustment Factor	3. 1.2650
Line 4	Multiply Line 3 by 15% =	4. 0.1898
Line 5	Detention Facilities - Normal Working Hours Adjustment Factor	5. 1.3000
Line 6	Multiply Line 5 by 10% =	6. 0.1300
Line 7	Detention Facilities - Other than Normal Working Hours Adjustment Factor	7. 1.3800
Line 8	Multiply Line 7 by 10% =	8. 0.1380
Line 9	Non Pre-Priced Adjustment Factor	9. 1.3156
Line 10	Multiply Line 9 by 5% =	10. .06578
Line 11	Add Lines 2, 4, 6, 8, and 10 (This is the Price Criteria Figure)	PCF = 1.30578

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

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
 - 1% of each Task Order as a Contractor License Fee for eGordian®

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

Questions?



- Make Sure you Signed the Pre-bid Sign-In Sheet
Final questions Due by 12/9/2022 at 5:00pm
- In instances where more than one contract is awarded per trade, one (1) contract will be awarded to the successful lowest bidder and one (1) to the second lowest bidder. Only one bid per Contractor shall be submitted for both contracts. The apparent lowest responsive and responsible bidder on one JOC contract will be excluded from consideration for the subsequent contract.
- Any questions regarding the Contract Documents may be submitted by email to Roxanne Maquinana or (628) 327-6611. All bid questions are preferred in writing no later than ten (10) calendar days prior to the bid date.

Bids Due: *December 14th at 2:00pm in the Clerk of the Board of Supervisors Office, Hall of Justice, 400 County Center, 1st Floor, Redwood City, CA 94063*