

Job Order Contracting Pre-bid Conference

General Engineering Contract No. 20-11-J – Class A
General Engineering Contract No. 20-12-J – Class A
General Engineering Contract No. 20-21-J – Class A

Nick Jones – Senior Account Manager
May 12, 2021



Pre-Bid Conference Agenda

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

Job Order Contracting

Definition

- Firm, Fixed Priced, Competitively Bid, Indefinite Quantity 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 Contracting Contract

Owner
Advertizes
Job Order
Contracting
Contract



Contractors
Submit
Bids



Owner
Awards
Umbrella
Job Order
Contracting
Contract

Part 2 Procuring Individual Projects From Owner

Owner
Project A

Subcontracting
Opportunities

Owner
Project B

Subcontracting
Opportunities

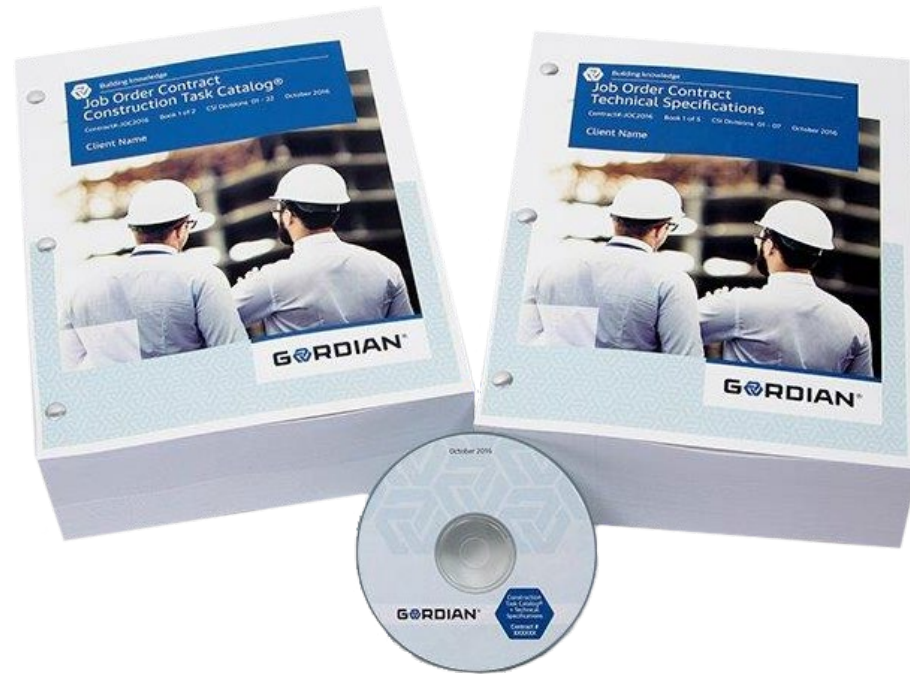
Owner
Project C

Subcontracting
Opportunities

The Process



Contract Documents



- Front End Documents
- Construction Task Catalog®
- Technical Specifications

Front End Documents

- Notice
- Instructions To Bidders
- Bid Forms
- CalWORKs Program requirements

SPECIFICATIONS

GENERAL ENGINEERING JOB ORDER CONTRACT

A MANDATORY pre-bid conference will be held at 10:00 a.m., on Wednesday, May 12, 2021 for the purpose of discussing the Job Order Contract concept, documents, bid considerations and to discuss Job Order Contracting from a contractor's viewpoint. The meeting will be held online (the link for which will be posted at <http://www.co.fresno.ca.us/planholders>).

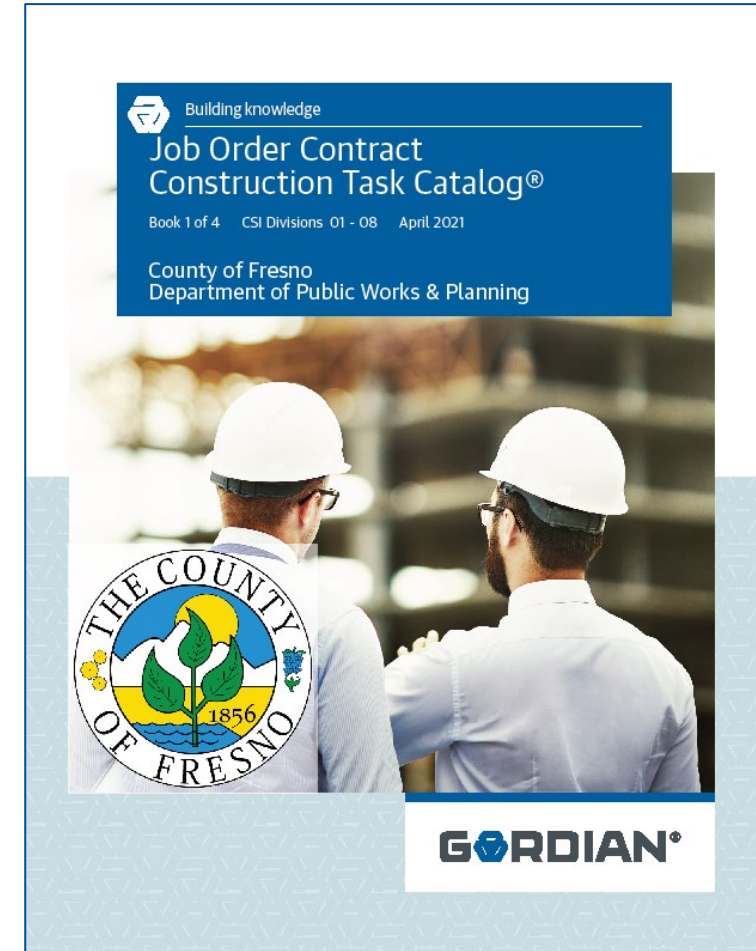
BUDGET / ACCOUNT: 4510 / 7370



Department of Public Works and Planning

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



Understanding the Construction Cost Catalog®

- Contractor must review and understand “Using the Construction Task Catalog®” – Rules of the Game

The Unit Prices Include

- Labor, Equipment, and Material*

The Adjustment Factors Include

- Overhead, profit, Sub Costs, Taxes, Fringe Benefits, Financing, Business Risks, 1% Contractor License Fee*

General Rules

- Construction Related Costs: Complete and In-place Construction, Cranes, Working Heights, Permit Services, Submittal preparation, Incidental A&E, Vehicles, Temporary Facilities and Utilities, Excess Waste, Restricted Working Space, Daily & Final Clean-up, Etc.*

Useful Information

- Abbreviations for Units of measure, material weights, conversions, etc.*

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 Fresno, priced locally using current labor, material and equipment costs, and published in April 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 Fresno. 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 registered service mark of CSI. Copyright © 2021 by CSI. All rights reserved. For more information, contact CSI at info@csimarketing.com.
MasterFormat.com | 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; 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.

April 2021
County of Fresno Department of Public Works & Planning
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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	7.18	3.23
		For Up To 20, Add	4.03	
		For >20 To 50, Add	2.27	
		For >50 To 100, Add	0.88	
		For >500 To 1,000, Deduct	-0.88	
		For >1,000, Deduct	-1.50	
32 16 13 13-0003	LF	6" X 12" Cast In Place Concrete Curb - Radius	8.18	3.72
		For Up To 20, Add	4.63	
		For >20 To 50, Add	2.61	
		For >50 To 100, Add	1.01	
		For >500 To 1,000, Deduct	-1.01	
		For >1,000, Deduct	-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

Construction Task Catalog[®]

The screenshot shows the eGordian web application interface. The top navigation bar includes 'eGORDIAN', 'Apps', 'Tools', 'eIQ', 'Videos', and 'Help'. The main content area is divided into two panels:

Job Orders Panel:

Project Number	Job Order Number	Title	Project Status
0014-001-0100	0014-001-0100-00	Emergency Work - Franklin Park	RFI
0012-000-0100	0012-000-0100	Stormwater work at 0012000 Spruce	
0013-001-0100	0013-001-0100-00	SFS - Resurfacing Customer Utility, Operation	Closed Out
0014-001-0007	0014-001-0007-00	Stormwater Pipe	RFI
0014-001-0007	0014-001-0007	Landscape Trailer	Proposal
0014-001-0100	0014-001-0100-00	Service Call #10	RFI
0014-001-0008	0014-001-0008-00	Street Run 100' and 4th parking work	RFI
0014-001-0008	0014-001-0008-00	County Mts - Parking - Working Area	Contractor Complete
0014-001-0008	0014-001-0008-00	News-6-10	RFI
0014-001-0008	0014-001-0008-00	Don't Center Loading Dock	Under Construction

Price Proposal List (Beta) Panel:

Project Number	Job Order Number	Name	Total \$
0014-001-0100	0014-001-0100-00	Emergency Work - Franklin Park	\$10,000.00
0012-000-0100	0012-000-0100	Stormwater work at 0012000 Spruce	\$124,200.00
0014-001-0007	0014-001-0007	Landscape Trailer Work	\$60,000.00
0014-001-0008	0014-001-0008-00	News-6-10	\$1,000.00
0014-001-0008	0014-001-0008	Coordination of existing utilities - Resurf. Storm (Storm) Turn Lane	\$28,000.00
0014-001-0008	0014-001-0008	Emergency Response Work	\$1,175.00
0014-001-0008	0014-001-0008	Repair Work at 0012176	\$14,400.00
0014-001-0008	0014-001-0008	Misc. Stormwater Repair	\$8,400.00
0014-001-0008	0014-001-0008-01	Misc. Stormwater Repair	\$8,400.00
0012-001-0110	0012-001-0110	News-6-10 Fire Station 400	\$70,000.00

Internet Based Software Provided with Contract

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

Non Pre-Priced Tasks

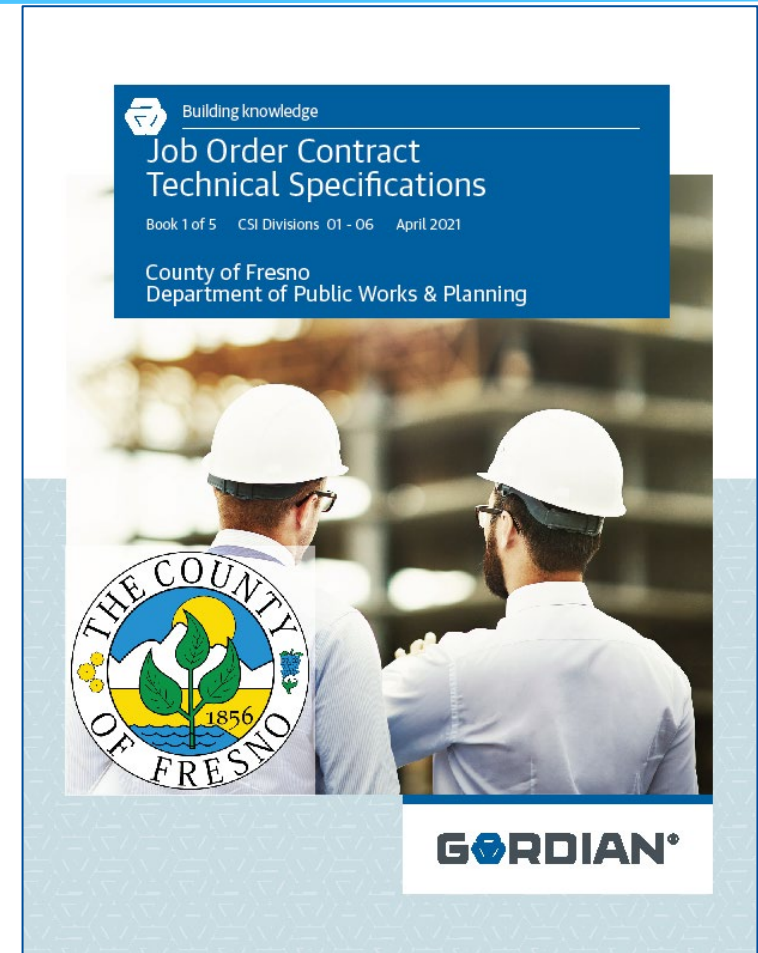
- Contractor must have permission from The County of Fresno to use a Non Pre-priced Task prior to submission
- Three (3) Quotes on vendors' or subcontractors' letterhead
- Justification for less than three (3) Quotes
- Contractor is paid the amount in the following formula:

Lowest Quote x Normal Working Hours Factor

Non Pre-Priced is not a vehicle to bypass CTC shortfalls

Technical Specifications

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



Solicitation Details

Prior to Bidding the County of Fresno Cannot:

- Identify or Commit to any Specific Project or Location
- Identify or Commit to any Specific CTC Tasks or Quantities

Contract	License Required	Minimum Contract Value	Maximum Contract Value	Contract Term	Bid Security	Initial Payment & Performance Bonding (Each)
20-11-J	Class A	\$0	\$3,000,000	1 year	\$25,000	\$2,000,000
20-12-J	Class A	\$0	\$3,000,000	1 year	\$25,000	\$2,000,000
20-21-J	Class A	\$0	\$3,000,000	1 year	\$25,000	\$2,000,000

- Maximum Contract Value may be increased up to the amount currently authorized by the CA Public Contract Code during the term of the contract.
- Payment and Performance Bonds will be increased in increments of \$500,000 such that the amount of the Payment and Performance Bonds are not less than one hundred percent (100%) of the outstanding aggregate Job Orders issued.

Bidding Process

Award Based on Competitive Bid

Bids for Class A Contracts must Bid **2 sets (4 total)**

Adjustment Factors:

- 1. Normal Working Hours** – Lower Elevations (7:00am to 5:00pm Monday through Friday)
 - 2. Other Than Normal Working Hours** – Lower Elevations (5:00pm to 7:00am Monday through Friday, and all day Saturday, Sunday, and Holidays)
 - 3. Normal Working Hours – Elevations Above 3000 Feet** (7:00am to 5:00pm Monday through Friday)
 - 4. Other Than Normal Working Hours – Elevations Above 3000 Feet** (5:00pm to 7:00am Monday through Friday, and all day Saturday, Sunday, and Holidays)
- All 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 successful!

Method to Calculate

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

Sample Project: Detailed Scope of Work

- Interior Renovation

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

Sample Price: CTC vs. Quote

Direct Cost of Work from CTC

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

TOTAL = \$ 66,344.12

Direct Cost of Work from Quotes or Estimates

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

TOTAL = \$ 65,000.00

Sample Price: Putting it all together

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

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

Prepare this calculation for more than one sample project.

Filling Out the Bid - Electronic Form

PROPOSAL - SCHEDULE OF ADJUSTMENT FACTORS AND AWARD CRITERIA FIGURE				
Number	Item Description	Weighted Multiplier	Adjustment Factor *	Extension
1	Normal Working Hours	0.40	\$1.2102	\$0.4841
2	Other Than Normal Working Hours	0.20	\$1.3102	\$0.2620
3	Normal Working Hours	0.30	\$1.2102	\$0.3631
4	Other Than Normal Working Hours	0.10	\$1.3102	\$0.1310
4 Items				Total: \$1.2402

* Samples only

Filling Out the Bid – Paper Form

BIDDER: _____

Adjustment Factors

The Bidder shall set forth Adjustment Factors in the respective space provided hereinafter. See example below. Failure to submit Adjustment Factors for all categories will result in the Proposal being deemed non-responsive. Specify Adjustment Factors to four (4) decimal places. The Other Than Normal Working Hours Adjustment Factors SHALL be EQUAL to or GREATER THAN the corresponding Normal Working Hours Adjustment Factors.

The Contractor shall perform the Tasks required by each individual Job Order using the following Adjustment Factors. When submitting Job Order Price Proposals related to specific Job Orders, the Bidder shall utilize one or more of the Adjustment Factors applicable to the Work being performed.

Example

One Point Two One Zero Two

1	.	2	1	0	2
---	---	---	---	---	---

(Written in clearly legible words) (Specify to four (4) decimal places in clearly legible figures)

Schedule of Adjustment Factors

1. Normal Working Hours (7:00am to 5:00pm Monday through Friday)

One Point One Eight Five Five

1	.	1	8	5	5
---	---	---	---	---	---

(Written in clearly legible words) (Specify to four (4) decimal places in clearly legible figures)

2. Other Than Normal Working Hours (5:00pm to 7:00am Monday through Friday, and all day Saturday, Sunday, and Holidays)

One Point Two Zero Zero Zero

1	.	2	0	0	0
---	---	---	---	---	---

(Written in clearly legible words) (Specify to four (4) decimal places in clearly legible figures)

3. Normal Working Hours – Work Over Elevations of 3000 Feet (7:00am to 5:00pm Monday through Friday)

One Point One Nine Five Zero

1	.	1	9	5	0
---	---	---	---	---	---

(Written in clearly legible words) (Specify to four (4) decimal places in clearly legible figures)

4. Other Than Normal Working Hours – Work Over Elevations of 3000 Feet (5:00pm to 7:00am Monday through Friday, and all day Saturday, Sunday, and Holidays)

One Point Two One Zero Two

1	.	2	1	0	2
---	---	---	---	---	---

(Written in clearly legible words) (Specify to four (4) decimal places in clearly legible figures)

BIDDER: _____

Award Criteria Figure

Transfer the number on Line 5 from the Award Criteria Figure Calculation below to the space provided below constituting the Bidder's Award Criteria Figure. Transfer the number and write the words.

One Point One Eight Five Five
(Written in clearly legible words)

1	.	1	9	0	6
---	---	---	---	---	---

(Specify to four (4) decimal places in legible figures)

Award Criteria Figure Calculation

The weighted multipliers (Line 2 and Line 4) are for the purpose of calculating an Award Criteria Figure only. No assurances are made by the County that Work will be ordered under the Contract in a distribution consistent with the weighted percentages. The Award Criteria Figure is only used for the purpose of determining the lowest Bidder.

The County Reserves The Right To and Will Correct All Arithmetic Errors In the Calculation of the Award Criteria Figure For Correctness.

Instructions To Bidder: Specify lines 1 through 5 to four (4) decimal places. Use conventional rounding methodology (i.e., if the number in the 5th decimal place is 0-4, the number in the 4th decimal remains unchanged; if the number in the 5th decimal place is 5-9, the number in the 4th decimal is rounded upward).

Line 1.	Normal Working Hours Adjustment Factor	1.	1.1855	
Line 2.	Multiply Line 1 by 60%			² 0.7113
Line 3.	Other Than Normal Working Hours Adjustment Factor	3.	1.2000	
Line 4.	Multiply Line 3 by 10%			⁴ 0.1200
Line 5.	Normal Working Hours Adjustment Factor – Work Over Elevations of 3000 Feet	5.	1.1950	
Line 6.	Multiply Line 1 by 25%			⁶ 0.2988
Line 7.	Other Than Normal Working Hours Adjustment Factor – Work Over Elevations of 3000 Feet	7.	1.2102	
Line 8.	Multiply Line 3 by 5%			⁸ 0.0600
Line 9.	Add Lines 2, 4, 6 and 8. This is the Award Criteria Figure:			1.1906

* Samples only

Bid Considerations

Contractors Should Expect To:

- Prepare Incidental Drawings or Sketches for Some Projects
 - *Justify Quantity Calculations during Proposal Review*
 - *Explain Detail of Work in Proposal User Notes*
- Prepare Proposals for Some Projects That Might be Canceled
- Margins on CTC Tasks Vary
- Some Projects are More Profitable than Others
- Adjustment Factor shall not be considered a minimum markup on subcontractor costs
- Maintain a Fully Functioning Office and Staff
- Hold Required Licenses, Bonds and Insurance
- Rebate 1% of each Job Order as a Contractor License Fee for eGordian[®] software access

Bid Considerations

- 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
- CalWORKs program
 - Goal of 33% of apprentice hours are performed by participants in state approved apprenticeship programs
- Department of Industrial Relations (DIR) Registration and Reporting Requirement

Contractor Adjustment Factor

Importance of Adjustment Factors

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

	Unit Price	x	Quantity	x	Adjustment Factor	=	Total for Task
+	Unit Price	x	Quantity	x	Adjustment Factor	=	Total for Task
+	Unit Price	x	Quantity	x	Adjustment Factor	=	Total for Task
							<hr/>
							Total Job Order Price

Why JOC Works For Contractors

- Good work is rewarded with more work
- Profit is a function of volume
- Volume is driven by performance
- JOC can provide a steady flow of work
- Win a higher percentage of proposed projects
- Long-term relationship with the County of Fresno
- Develop partnership with the County
- Ability to leverage Subcontractor and Supplier relationships

Why JOC Works For Facility Owners

- A Fixed Priced, Fast Track Procurement Process
- Job Orders become Lump Sum to complete the scope of work
- 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 of Fresno can Use All Other Methods For Accomplishing Projects

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
 - Reassignment of Projects
- 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
 - \$3,000,000.00
- Evaluate Construction Task Catalog[®]
 - Analyze Unit Prices
 - Know the General Guidelines for Using the CTC
- Contractor Performance Drives Volume
 - Responsive Service
 - Accurate Proposals
 - Safe and Clean Project Sites
 - High Quality Construction
 - On-Time Completion
 - On Time Close Out

Bids

- Sealed bids due: Thursday, May 27, 2021 at 2:00 PM
- <https://www.bidexpress.com/businesses/36473/home>
or
- Fresno County Department of Public Works and Planning
Office of the Design Engineer
Seventh Floor
Fresno County Plaza Building
2220 Tulare Street
Fresno, CA 93721

Questions

- Make Sure you confirmed your attendance
- Bidding Questions:
 - All questions are due no later than 2:00 P.M. on the seventh (7th) calendar day before bid opening.
 - Questions shall be submitted electronically through the project website.