



# JOB ORDER CONTRACTING SERVICES Pre-Bid/Information SEMINAR

November 2020



# Agenda

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- Introduction
- History/schedule/RFQ walk-through
- JOC Overview
- Questions

# Background

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## History/Background of JOC program at PSU

- JOC program has been in place for nearly 10 years at PSU
- Average around 100 projects per calendar year
- Average \$15Mil annual program volume
- “Sweet spot” \$500k and under

# Schedule(targeted)

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11/9/2020	Distribute RFQ
11/19/2020	Pre-Bid/Information meeting
12/2/2020	RFQ Due
Week of 12/21/2020	Distribute RFP
Week of 1/11/2021	RFP info meeting
2/5/2021	RFP Due
Week of 3/8/2021	Interviews if needed
Late March to Mid-April 2021	Final Selections

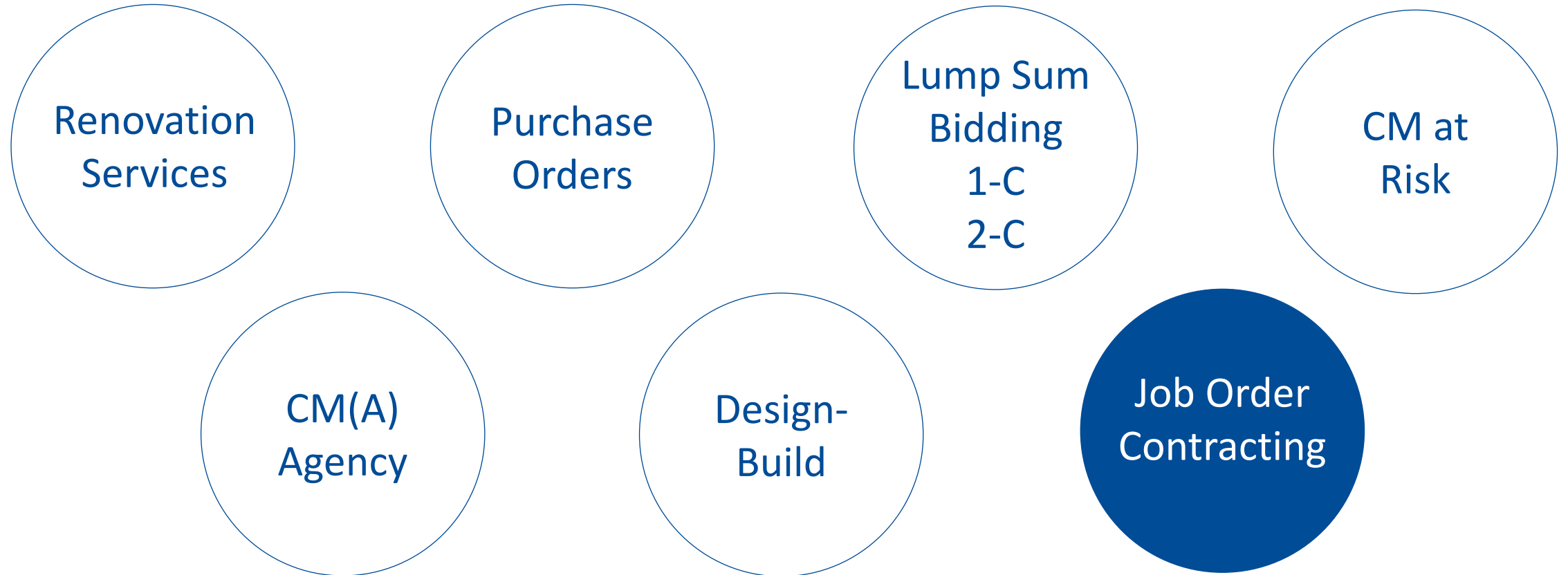
# RFQ Walk-Through

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# JOC Overview:

## JOC is Just Another Procurement Tool

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# JOC Overview

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- Job Order Contracting is an Indefinite Quantity Construction Contract
- JOC Introduced in the United States in 1985
  - Dept. of Defense, USPS, NASA, etc.
- Implemented by states, counties, cities, K-12 schools, universities, housing authorities, etc. since 1990
- Hundreds of contracts currently in use
- Over \$1.4 Billion in construction placed annually through Gordian JOC systems

# JOC Overview

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## 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: Umbrella Contract

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- At this time, the University Cannot
  - Identify or Commit to any Specific Project or Location
  - Identify or Commit to any Specific CTC Tasks or Quantities
- Fixed Base Term of (3) years with Option to Renew
- Estimated Annual Value (Varies)
- Contract Award Based on 3-Step Process RFQ, RFP, potential Interviews
- Contractor Performance, Contractor workload, Project Leader workload, and project fit for JOC drives Volume of Work

# JOC Overview: Umbrella Contract

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- Price Component is Based On Proposed Adjustment Factors
  - Normal Working Hours
  - Other than Normal Working Hours
  - Non pre-priced
- Each Adjustment Factor is Weighted to Create an Award Criteria Figure
- Contractor with lowest Award Criteria Figure Deemed to be the Lowest Price

# JOC Overview:

## Procuring Individual Projects

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- Joint Scope Meeting With the Owner, Contractor, and Others to define the Detailed Scope of Work
- Owner Issues Request for Job Order Proposal for the Agreed Upon Detailed Scope of Work
- Proposal Development
  - **Typical Proposal Due Date will be 2 weeks from Request for Job Order Proposal**
- Proposal Review
- Issuance of Job Order
- **Total Time Goal: Average 3-5 weeks**

# JOC Benefits

## Why JOC Works For Contractors

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

# JOC Benefits: 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 Benefits:

## Why JOC Works For Subcontractors

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- Responsiveness requires local prime presence and use of multiple local subcontractors.
- Wide range of possible projects means variety of subcontractors will be needed to fulfill the contract.
- Simplified procurement process for the Client allowing them to procure more work in a shorter period of time. Results in greater number of subcontractor opportunities
- Multiple projects on multiple sites simultaneously.

# JOC Benefits:

## Why JOC Works For Owners

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- A Fixed Priced, Fast Track Procurement Process
- 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 University can Use All Other Methods For Accomplishing Projects
- Design Assist capabilities
- Partnership with Owner



# JOC Benefits:

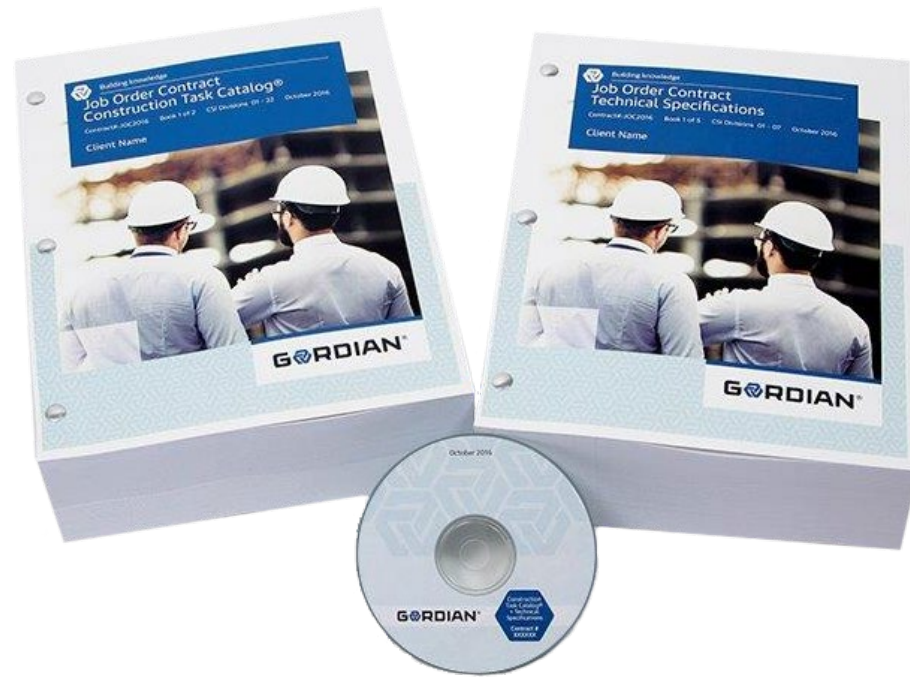
## Why JOC Works For Facility Owners

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

# The Contract Documents

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- Step 1 Request for Qualification
- Step 2 Request for Proposal
- Step 3 Potential Interviews
- The Construction Task Catalog®
- The Technical Specifications

# The Contract Documents

## 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

## 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

**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.

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# 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, finish and curing.</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®

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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Owner 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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Owner

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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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Owner Page 00 - 1



# The Contract Documents: Non Pre-Priced Tasks

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- Contractor must have permission from the University to use a Non Pre-priced Task prior to submission
- Formula contained in the Contract Documents determines direct cost of Non Pre-priced task.
- Formula requires three (3) Quotes on suppliers' or subcontractors' letterhead or justification for less than three (3) Quotes
- Non Pre-priced Task is Multiplied by the Non Pre-Priced Adjustment Factor

# The Contract Documents

## The Technical Specifications

- Specifies Quality of Materials and Workmanship(PSU/OPP Design and Construction Standards)
- Corresponds with Tasks in the Construction Task Catalog<sup>®</sup>



# JOC Management Software

Number	Job Order Name	Contract Name	Status	Price Proposal Total	Last Updated	Last Updated By
ReportActionTest001	ReportActionTes...	ReportActions001	Project Initiation		03/14/2019	r.yenugu@thegordiangroup.com
job2	job2n	Release Demo Contract	Proposal Due		03/14/2019	procontractor@gmail.com
jubnum	job1	ecc9a903-67a4-45a4-86e8-6d100d6682d7	Project Initiation		03/14/2019	procontractor@gmail.com
NewNpProject	NewNpProject	Release Demo Contract	Proposal Due		03/14/2019	k.krishnamurthy@thegordiangroup.com
AdarshKT	AdarshKT	AdarshKTJOC	Proposal Due		03/14/2019	k.krishnamurthy@thegordiangroup.com
modifierissue2	modifierissue2	2A520BA9-0157-47BB-9D7D-6D307A022A95	Proposal Approved		03/14/2019	k.krishnamurthy@thegordiangroup.com
ReportAction_Test111	ReportAction_Te...	Release Demo Contract	Project Initiation		03/13/2019	r.yenugu@thegordiangroup.com
1	jotoapprove	Release Demo Contract	Proposal Approved		03/13/2019	k.krishnamurthy@thegordiangroup.com
NewJOCheckVersionTotalls...	NewJOCheckVer...	Release Demo Contract	Proposal Approved		03/12/2019	k.krishnamurthy@thegordiangroup.com

1 - 50 of 177 items

## Internet Based Software Provided with Contract

- The Gordian Cloud JOC Management Software Expedites the Job Order Process
  - Price Proposals
  - Subcontractor Lists
  - Tracking Dates
  - Required Job Order Forms
- Training provided

# 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

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## Risks of Low Adjustment Factors

- Leads to Arguments in Proposal Review
  - Unsupportable Tasks
  - Exaggerated Quantities
- Leads to Delays in Job 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

# Questions

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**PennState**  
Physical Plant