



California State University, Chico  
Job Order Contracting  
General Construction Contract PRE-BID Conference  
**Bid Solicitation: IFB2023-06JT**  
**December 14, 2023**  
9:00 am

# Agenda

- Introductions
- Overview
- Solicitation
- Contract Documents
- The Construction Task Catalog
- Adjustment Factors
- Factor Risks
- Calculating your Bid
- The Bid Process
- JOC Process
- Bid Considerations
- Milestones
- Q and A





Attendance today is required to submit a bid.  
Please enter your name, company, and email address in the  
chat to document your attendance.  
Failure to do so may prevent your bid from being accepted.



# Overview

JOC is an indefinite delivery/indefinite quantity or Umbrella contract

# Types of Projects

From one competitively bid and then awarded contract,  
you are able to complete an indefinite number of Job orders



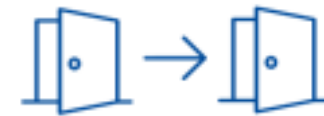
Remodeling



Repairs



Renovations



Replacement  
in-kind



Maintenance



Emergency  
Work



Time sensitive  
projects



Alterations

# Umbrella Contract



California State  
University **Chico**

Part 1 – Bidding the Umbrella Job Order Contract

Part 2 – Procuring Individual Projects from Owner



Owner Advertises Job Order Contract

Contractor Submits Bid

Owner Awards Umbrella Job Order Contract

- Owner Project A
- Owner Project B
- Owner Project C
- Subcontracting Opportunities
- Subcontracting Opportunities
- Subcontracting Opportunities



# JOC Benefits

- Simplifies procurement
- Responsive contractors rewarded
- Improves the quality of work
- Increases local subcontractor participation
- Volume is driven by performance
- Collaborative by design
- Reduces Risk & increases transparency
- A Fixed Priced, Fast Track Procurement Process, JOC allows for a higher percentage of job orders to be delivered on time and within budget

# History with CSU



More than \$750M in job orders completed since 1999:

- Classroom and Lab remodels
- Hazmat abatement
- Dorm Upgrades
- Roofing
- Mechanical & HVAC
- Electrical & lighting
- Parking lot repaving
- Immediate Response





# Contract Bid Documents



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



# Front End Documents

- Notice to Contractors
- Bid Form (Sample)
- General Conditions (Chancellor's Office)
- Supplementary General Conditions(Chancellor's Office)
- Special Conditions (Campus Specific)
- CTC and Technical Specifications
- Systemwide Financial Prequalification (Chancellor's Office)
- Supplemental Prequalification ( Campus Specific)
- Sample Forms



**CSU** The California State University  
WORKING FOR CALIFORNIA

**BID PROPOSAL FORM**  
JOB ORDER CONTRACT, BID NUMBER 3863  
California State University, Bakersfield  
9001 Stockdale Hwy  
Bakersfield, CA 93311

To the Trustees of the California State University, on behalf of the State of California (hereinafter called the Trustees):  
The undersigned Bidder, who is familiar with the local conditions affecting the cost of the work and with the contract documents, hereby proposes, with the rates stated below, to provide and furnish all of the labor, materials, tools, equipment, expendable and otherwise, apparatus, facilities, transportation, and permits, and to perform and complete in a workmanlike manner and within the specified time the work required, all in accordance with the contract documents and the Trustees' unit prices as adjusted as hereinafter set forth.  
The Bidder understands that the Trustees reserve the right to reject any or all bids, to waive minor irregularities in any bid, and to award the contract to the lowest responsible bidder.

**BIDDER SHALL ACKNOWLEDGE EACH ADDENDUM RECEIVED ON THE LINE BELOW**

The bid is subject to the provisions contained in the Contract General Conditions (note especially Article 2.00 et seq regarding instructions to bidders), and the bidder agrees that failure to comply with the conditions herein shall be basis for rejection of this bid.  
The bid must be submitted on this Proposal Form, completely filled out under a sealed envelope provided by the Trustees, and delivered to the Procurement Office (Rm 1010 of the Administration West Building #00) at California State University, Bakersfield before 3:00 p.m. on Wednesday, June 3, 2020 or it will be disregarded. The Trustees will only accept bids from prequalified contractors with a current California State License (Board-issued type B license and current California Department of Industrial Relations Public Works Registration number).

**Notice:** The attention of bidders is particularly called to the fact that unless the bid is made in strict conformity with the directions given, it will be considered informal and may be rejected.

**Schedule of Prices**  
The undersigned agrees to perform all work required, necessary, proper for, or incidental to completing the work called for in each individual job order under applicable Job Order Contracting using the Construction Task Catalog and Technical Specifications incorporated herein with the following adjustment factors:

**Normal Working Hours**  
Undersigned shall perform any or all functions called for during normal working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by the adjustment factor of:  
 .    (Specify to four (4) decimal places)

**Other Than Normal Working Hours**  
Undersigned shall perform any or all functions called for during other than normal working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by the adjustment factor of:  
 .    (Specify to four (4) decimal places)

**NOTE - NO FACTOR MAY BE LESS THAN THE NORMAL WORKING HOURS ADJUSTMENT FACTOR**

**Premium Working Hours**  
Undersigned shall perform any or all functions called for during premium working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by the adjustment factor of:  
 .    (Specify to four (4) decimal places)

**NOTE - NO FACTOR MAY BE LESS THAN THE NORMAL WORKING HOURS ADJUSTMENT FACTOR**

Construction Admin  
700.022-1.2.14

# General Conditions



- Bid Requirements
- Award and Execution Process
- Conduct of Work
- Scope and Procedure for Job Order Work
- Interpretation and Adherence to Contract Provisions
- Changes in the Work
- Claims and Damages
- Payment and Close Out

# JOC Technical Specifications



- Specifies Quality of Materials and Workmanship
- Corresponds with Tasks in the Construction Task Catalog<sup>®</sup>
- Order of Precedence
  - Campus Specifications
  - A/E Specifications
  - JOC Technical Specifications



# Construction Task Catalog®



- Catalog of more than 280,000 Pre-Priced Construction Tasks
- Organized by Construction Specifications Institute (CSI)
- Based on Local Labor, Material & Equipment Costs – within a 15-25 mile radius of campus
- The tasks represent the “Scope of Work” for the umbrella contract on which you are bidding
- Current Prevailing Wage rates apply
- Direct cost of construction *only*

# Construction Task Catalog® (cont.)



	<b>Exterior Improvements</b>	<b>32</b>	
	<b>Bases, Ballasts, And Paving</b>	<b>32 10</b>	<b>32</b>
	Unit Paving	32 14	

MINOR CSI	UOM	DESCRIPTION	TOTAL DIRECT UNIT COST	DEMOLITION UNIT COST
<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> 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'.		
<b>32 16 13 13</b>		<b>Cast-In-Place Concrete Curbs And Gutters</b> <small>(32 16 13)</small> Note: Includes concrete, forms, rebar, chairs (where necessary), expansion joints.		
<b>32 16 13 13-0001</b>		<b>Concrete Curb, Cast In Place</b> <small>(32 16 13 13)</small> Note: Includes delivered concrete, forms, rebar, chairs (where necessary), expansion joints, finish and curing.		
<b>32 16 13 13-0002</b>	LF	6" X 12" Cast In Place Concrete Curb ..... 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	7.18	3.23
<b>32 16 13 13-0003</b>	LF	6" X 12" Cast In Place Concrete Curb - Radius ..... 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	8.18	3.72

CSI MasterFormat

Full description of task

Price includes labor, material + equipment for your location

Demolition price

Section + task notes

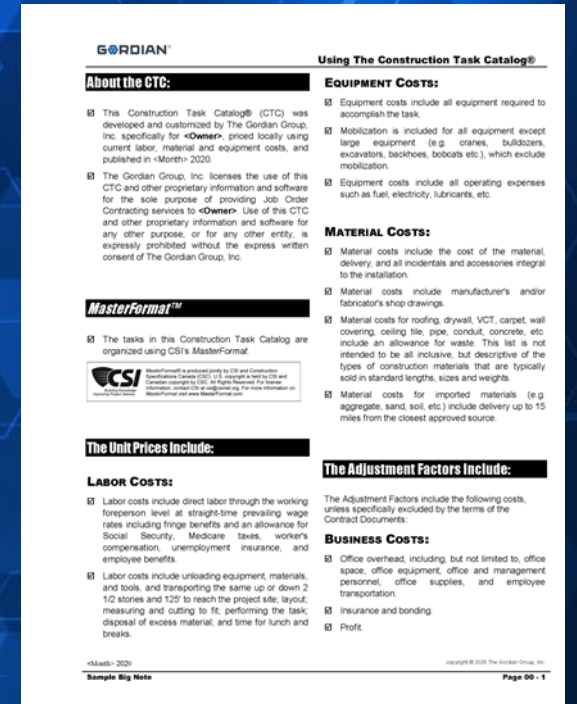
Modifiers for variations or quantity discounts



# Understanding the Construction Task Catalog®



- Is a CONTRACT DOCUMENT
- 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
- See the link to the landing page below for more details
  - [CSU JOC Landing Page](#)



# Understanding the Construction Task Catalog® (cont.)



## General Rules:

- 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 ,and Distance is 150' from lay down.
- Unit Prices Include Testing, Calibration, and Balancing, etc. of all new work .
- Unit Prices Include all Fasteners, Bolts, Anchors, Adhesives etc., for almost all new work.
- Tasks to install Windows, Doors, Frames, Countertops Etc. all include sealant and caulk so they cannot be added to a proposal where they have already been considered



# Understanding the Construction Task Catalog® (cont.)



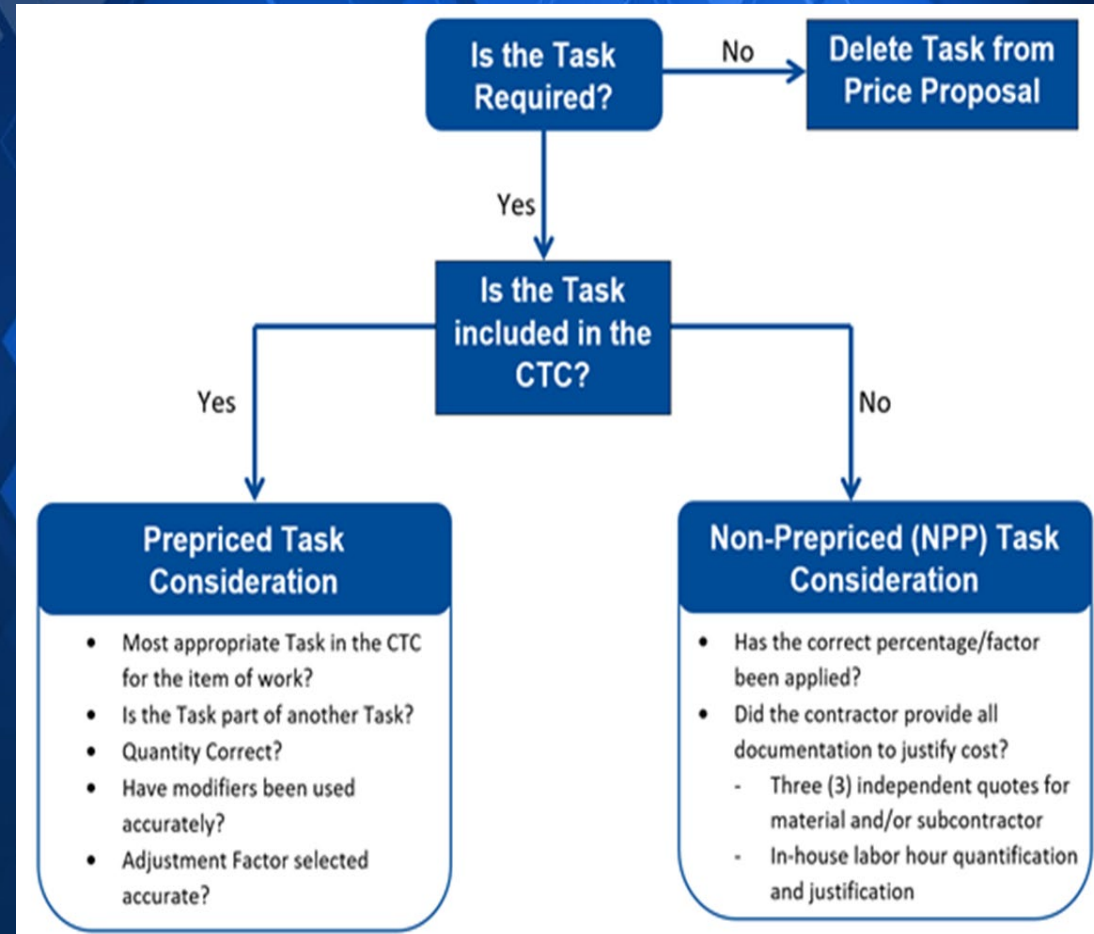
Contractors Never Get Paid Separately For:

- 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. Jobsite Posters, Non-Working Staff.
- Portable Toilets, Field Office, Field Office Equipment for Contractor's Use
- Layout, Site Engineering for the Work Itself, Daily Clean Up or Final Cleaning.

# Non Pre-Priced Tasks



- Contractor **must** have permission from the University 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's mark-up is a set NPP Factor. Normal working hours times 1.15% with a maximum factor of 1.1500.

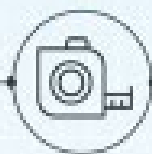


Step 1



Joint Scope Meeting

Step 2



Request for Proposal

Step 3



Price Proposal

Step 4



Price Proposal Review

Step 5



NTP / JOA Issued

Step 6



Construction Starts

# JOC Process



California State University Chico

## Detailed Scope of Work

This documents a thorough account of activities the contractor must perform to complete the job.

- Collaborative document between owner and contractor
- Defines the project's scale, location, and description
- Details out items such as paint color, types of materials, strength of concrete required, etc.

An agreed upon Scope of Work is **very** important! This is a prime opportunity for the contractor and campus to dissect the project into smaller details and produce an agreed scope of work to be used to build an accurate price proposal.

# Contractor Adjustment Factor



## Importance of Adjustment Factors

- Determines Lowest Bidder AND
- Used to Price Every Individual Work Order
- An Approved Price Proposal Total Becomes the Job Order Price
- Do this several times to refine your factors.

	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

# Adjustment Factors



Your Adjustment Factors must include (but not limited to):

- All overhead, profit and taxes for the contractor and subcontractor
- All 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
- Mandatory site supervision and management meetings
- All OSHA required job site postings and safety precautions

Please review Understanding the  
Construction Cost Catalog<sup>®</sup> for comprehensive listing

# Risks of Low Adjustment Factors

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/ Leads to Cancellation
- Lost Profitability and Reputation

There is “No Second Chance” to Improve your Margin

# Method to Verify Your Adjustment Factors



1. Use Historical Project Data
2. Select a Completed Project You Know Scope and Direct Costs
3. Price Project From CTC
4. Add on Overhead and Profit
5. Calculate the Adjustment Factors
6. Perform this validation several times to refine your adjustment Factors





California State  
University Chico

## 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**

**GORDIAN**<sup>®</sup>



# Sample Price Costs, CTC vs Historical Costs



## Sample Price Costs: CTC vs. Historical Cost

Direct Cost of Work from Quotes or Estimates Based on Your Trade,  
vs Tasking from the CTC

CTC		Your costs	
• Replace Boiler	\$ 33,055.73	• Replace Boiler	\$ 34,500.00
• Doors/Hardware	\$ 8,282.09	• Doors/Hardware	\$ 7,250.00
• Lighting	\$ 13,119.77	• Lighting	\$ 12,750.00
• Plumbing	\$ 11,886.53	• Plumbing	\$ 10,500.00
TOTAL = \$ 66,344.12		TOTAL = \$ 65,000.00	

# Sample Price Costs: 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**

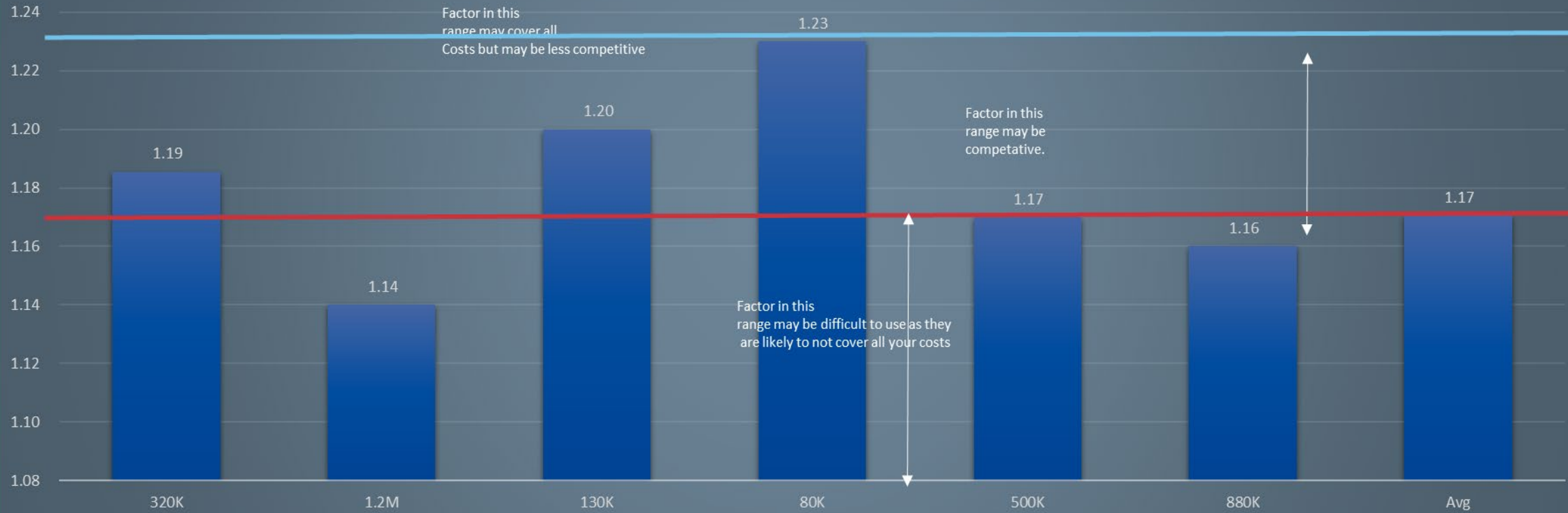
\*Sample Only. Contractor to determine O/H & Profit.

[Prepare this calculation for more than one sample project](#)

# Sample Price: Putting it all together



### Job Order Contracting Program Sample Project AF Review



# Bidding Process



## Award Based On Competitive Bid

- Must Bid Three Adjustment Factors

Normal Working Hours: 7:00am to 5:00pm Monday – Friday, Holidays Excepted

Other Than Normal Working Hours: 5:00pm to 7:00am Monday – Saturday

Premium Working Hours: Sundays and Holidays

- Adjustment Factors Applied to All Tasks in the CTC, and to All NPP's
- Each Adjustment Factor is Weighted to Create an Award Criteria Figure
- Lowest Composite Score from a Responsive, Responsible Bidder is Determined to be the Lowest Bidder

Nothing written in this presentation supersedes what is provided in your bid package. Any deviations or changes to the bid documents will be provided in the form of an addendum.

# Filling Out the Bid Form



## Schedule of Prices

The undersigned agrees to perform all work required, necessary, proper for, or incidental to completing the work called for in each individual job order issued under this Job Order Contract using the Construction Task Catalog and Technical Specifications incorporated herein with the following adjustment factors:

### Normal Working Hours

Undersigned shall perform any or all functions called for during normal working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by the adjustment factor of:

.     (Specify to four (4) decimal places)

### Other Than Normal Working Hours

Undersigned shall perform any or all functions called for during other than normal working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by the adjustment factor of:

.     (Specify to four (4) decimal places)

**NOTE – NO FACTOR MAY BE LESS THAN THE NORMAL WORKING HOURS ADJUSTMENT FACTOR.**

### Premium Working Hours

Undersigned shall perform any or all functions called for during premium working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by the adjustment factor of:

.     (Specify to four (4) decimal places)

**NOTE – NO FACTOR MAY BE LESS THAN THE NORMAL WORKING HOURS ADJUSTMENT FACTOR.**

# Filling Out the Bid Form (cont.)



**BASIS OF CONTRACT AWARD:** The award formula below is an integral part of this proposal, and to be responsive, the bidder shall quote for the total works above, and shall also complete the award formula below.

## AWARD FORMULA

Line 1.	Normal working hours Adjustment Factor	1.	<u>1.2034</u>
	Line 2. Multiply Line 1 by (80) %	2.	<u>0.9627</u>
Line 3.	Other than normal working hours Adjustment Factor	3.	<u>1.2500</u>
	Line 4. Multiply Line 3 by (15) %	4.	<u>0.1875</u>
Line 5.	Premium working hours Adjustment Factor	5.	<u>1.2900</u>
	Line 6. Multiply Line 5 by (5) %	6.	<u>0.0645</u>
Line 7.	Add Lines 2 and 4 and 6		
	(This is the weighted, composite bid for this contract.)	7.	<u>1.2147</u>



# Bid Package Requirements



After successful pre-qualifications you will complete and submit the following as your Bid:

1. Bid Proposal Form
2. Bidders Bond / Security
3. Certification of DIR registration
4. Certificate of Appropriate Licenses and California Co.
5. Affidavit of Joint Venture
6. DVBE /Small Business Preference incentives & Certification (If applicable.)
7. Non-Collusion Affidavit
8. Bid Proposal Form Signature Page

# Solicitation Details (cont.)



- Prior to the Award, the CSU Cannot:
  - Identify or Commit to any Specific Project or Location
  - Identify or Commit to any Specific CTC Tasks or Quantities
- There are up to Three Contracts to be Awarded

Contract	Contract Type	Maximum Contract Duration	Minimum Contract Value	Initial Maximum Contract Value	Initial Payment & Performance Bonding (Each)	Bid Security
JOC # 2023	General Construction B License	1 Year	\$0	\$1,000,000	\$\$1,000,000	\$25,000

# Solicitation Details (cont.)



## SB/DVBE Brief Overview

- DVBE – Mandatory 3% participation for Disabled Veteran Business Enterprises (SGC Article 2.12 and CGC Article 5.05-E)

Required documentation: DVBE Compliance Form (DVBE-C), DVBE Transmittal Form, Summary of DVBE

Participation (Attachment 1), Bidder's Certification (Attachment 2), DVBE Declaration STD 843

## DVBE Bid Incentive

- CGC Article 2.12
- Exceed 3% DVBE participation requirement

DVBE Participation	Incentive
3.00% to 3.99%	None
4.00% to 4.99%	1%
5.00% to 5.99%	2%
6% or more	3%

<https://caleprocure.ca.gov/pages/PublicSearch/supplier-search.aspx>

<https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division-Services-List-Folder/Certify-or-Re-apply-as-Small-Business-Disabled-Veteran-Business-Enterprise>

# Solicitation Details (cont.)



- Differing Site Conditions or Changes in Scope
  - Priced from Construction Task Catalog<sup>®</sup>
  - 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
- SBE 5% Bid Advantage (Review requirements in the General Conditions)
- DVBE 3 %Bid incentive (Review requirements in the General Conditions)
- DVBE Participation Requirement of 3% for all awardees on all contracts
- Bid Security: \$25,000

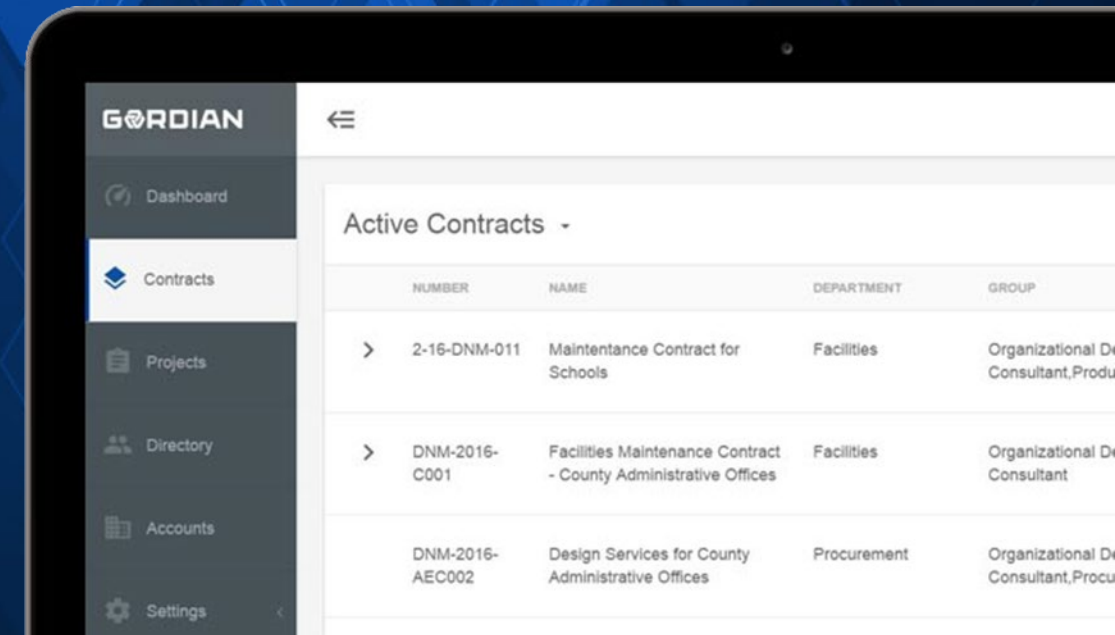
# Solicitation Details (cont.)



## Internet Based Software Provided with Contract

### Software Training Expedites the Job Order Process in Gordian Cloud

- Price Proposal building and review
- Ongoing training as needed for new hires
- Troubleshooting
- Subcontractor tracking



# Prequalifications



Each interested contractor, must comply with bidding provisions of Article 2.00 et seq. in the Contract General Conditions, and should be familiar with all the provisions of the Contract General Conditions , Supplementary Conditions, and Special Conditions, especially Article 2.02, regarding the necessity to prequalify with the Trustees ten (10) business days prior to the bid date. Two prequalification's are required to submit a bid .

**Financial “Systemwide” Pre-qualification and Supplemental Pre-qualification submissions due: Not later than Thursday, December 21, 2023, by 5:00 P.M.**

Bidders must be prequalified with the Trustees. Contractors shall register and log in to “PlanetBids” to apply for prequalification at

[http://www.calstate.edu/cpdc/cm/contractor\\_prequal\\_bidders.shtml](http://www.calstate.edu/cpdc/cm/contractor_prequal_bidders.shtml).

In addition to the Systemwide Prequalification, prospective bidders must also receive and complete a **Supplementary Prequalification** which is provided upon request to the campus by sending an email to:

Jennifer Thayer, [jthayer@csuchico.edu](mailto:jthayer@csuchico.edu)

Interested Bidders must complete and submit the Supplementary Prequalification Form via email to:

[cocm.prequal@calstate.edu](mailto:cocm.prequal@calstate.edu)

Once a Prospective Bidder is prequalified, they shall submit both a copy of their CSU Systemwide prequalification receipt and Supplementary Prequalification receipt to receive a bid package .

# Bid Opening



## Submitting a Bid Package

The Trustees of the California State University will receive sealed bid proposals from Prequalified Contractors in Kendall Hall, Room 206, California State University, Chico 400 West First Street,

Chico, CA 95929 until Tuesday, January 9, 2024, at 2:00 pm. (Any proposals received after 2:00 pm on January 9, 2024, will be rejected)

## Bid Opening

The bid opening meeting will be held in person, in Kendall Hall, Room 206, California State University, Chico 400 West First Street, Chico, CA 95929. It is the bidders' responsibility to advise of your desire to attend the bid opening meeting by emailing [jthayer@csuchico.edu](mailto:jthayer@csuchico.edu), to request an invitation .

An invitation will be sent to the bidders upon receipt of proof of their physical bid submission.

# Due Dates and Questions



All questions concerning this solicitation must be received via email no later than: **Thursday, December 28th, 2023 by 5:00pm**

Systemwide Financial Prequalification Forms and Supplemental Prequalification Forms due not later than:

- **Thursday, December 21<sup>st</sup>, 2023, by 5:00 P.M.,**  
**and**

**All Bids are due by Tuesday, January 9th, 2024 at 2:00pm.**



# California State University, Chico

Thank you very much for your interest in JOC and for attending  
this Mandatory Prebid Meeting

We look forward to working with the Awardees in 2024