



COUNTY OF SANTA CRUZ

General Services Department Purchasing Division

701 OCEAN STREET, SUITE 330, SANTA CRUZ, CA 95060-4073

ADDENDUM #1

Requests for Proposals (RFPs) for Job Order Contracting:

23P3-005 for Roofing Construction Services
23P3-006 for General Construction,
23P3-007 for Horizontal Paving,
23P3-008 for Mechanical Construction Services,
23P3-009 for Plumbing Construction Services,
23P3-010 Electrical Construction Services

Issued 12/07/2023

Addendum (#1) is being issued to address the following:

- To correct an inaccuracy in the RFP documents pertaining to the Estimated Maximum Annual Contract Value for Paving/Horizontal Construction, Mechanical Construction, Electrical, and Plumbing.
- To answer questions posed by prospective vendors regarding the JOC RFPs as specified in the section below,
- To provide a PDF version of the PowerPoint presentation and the list of attendees at the Mandatory Pre-Proposal Web Conference.

RFP Correction for the Estimated Maximum Annual Contract Value for Paving/Horizontal Construction (23P3-007), Mechanical Construction (23P3-008), Plumbing (23P3-009), and Electrical (23P3-010).

The Estimated Maximum Annual Contract Value is **\$5,797,725.00** for each of the JOC RFP contract categories.

Vendor Questions

Vendor #1

1. Question: How is the County defining a local office that is required for the contractors? It sounded like Santa Cruz County, Monterey County and San Benito County are considered the three local counties that will be considered local.

Answer: A local office is defined as being within 100 miles of Santa Cruz County, with capacity to respond to the site of the project within 2 hours of request received by the County.

Vendor #2

1. Question: Do we need to send BID BOND Original to you?

Answer: Please disregard Section 2.4 d. requiring Bid Proposal Security on JOC RFP submittals. This was included in error. A Bid Bond is not required as part of the proposal submittal, however, once the solicitation is completed and a JOC catalog has been finalized, approved JOC vendors are required to carry a Bid Bond of \$25,000 to be eligible to bid on JOC projects.

Vendor #3

1. Question: Please confirm/define the “local office” requirements for the subject RFP. Is this a particular mile radius or location in a particular county?

Answer: A local office is defined as being within 100 miles of Santa Cruz County, with capacity to respond to the site of the project within 2 hours of request received by the County.

Vendor #4

1. Question: The official RFP Form (pg. 19 of 40) states that respondents shall include in their proposal completed exhibits A, B, D, E, and F. However, I cannot locate an Exhibit F. Please advise.

Answer: Language referring to Exhibit F shall be disregarded. Please complete the following exhibits as part of your proposal submittal:

- **Exhibit A: Respondent Fact Sheet**
- **Exhibit B: Customer References**
- **Exhibit C: Non-Collusion Declaration**
- **Exhibit D: Protest and Appeals Procedure**
- **Exhibit E: Insurance Requirements- this is informational only and details the County’s standard insurance requirements.**

2. Question: Is a bid bond required? If so, is the amount \$25,000 as stated on pg. 7 of 40 (proposal security)?

Answer: Please disregard Section 2.4 d. requiring Bid Proposal Security on JOC RFP submittals. This was included in error. A Bid Bond is not required as part of the proposal submittal, however, once the solicitation is completed and a JOC catalog has been finalized, approved JOC vendors are required to carry a Bid Bond of \$25,000 to be eligible to bid on JOC projects.

Vendor #5

1. Question: Will the County of Santa Cruz please define a “contractor’s local business office” to be within a 50 or 75 mile radius of the Santa Cruz County Office?

Answer: A local office is defined as being within 100 miles of Santa Cruz County, with capacity to respond to the site of the project within 2 hours of request received by the County.

2. Question: Will the County of Santa Cruz allow signatory contractors to use their local affiliated union office to qualify for the provisions of a local business as defined in the bid documents for 23P3-010?

Answer: Yes, that is allowed.

Vendor #6

1. Question: Is there only one horizontal paving contract or is there 3?

Answer: This answer is in regards specifically to 23P3-007 for Horizontal Paving. There are three. The final contracts will be labeled JOC-001, JOC-002 and JOC-003. The invitation in Section 1 lists General Construction in error and should instead reference Horizontal Paving.

2. Question: Where are the plans/specs/quantities etc. that we need to bid off of?

Answer: There are no specific jobs to bid on. The JOC RFP submission requires contractors to build their adjustment factors using the Construction Task Catalog and Technical Specifications documents, which are linked online as part of the RFP documents. Please refer to Section 5. Official RFP form with details regarding what should be submitted with the RFP submittal. The process is

mapped out in more detail in the copy of the PowerPoint Presentation, which is attached to this addendum.

Vendor #7

1. Question: Plumbing trade. Can be performance/ payment bond drop down to \$500,000 and by the job increase bond if needed, if project will be more than \$ 500,000.

Answer: The County confirms that the payment and performance bond requirement has been reduced to \$500,000 across all JOC Requests for Proposal per this addendum. Any project estimate that exceeds \$500,000 will require payment and performance bonds equal to or greater than the sum of the project.

All other information remains the same.

December 01, 2023 was the deadline for all questions regarding this RFP. No further questions will be accepted by Purchasing.

RFP SUBMITTAL DEADLINE REMAINS UNCHANGED.

RFP DUE:

Friday, December 15, 2023 by 5:00 PM Pacific Time
In the Purchasing Division of General Services
701 Ocean Street, Room 330
Santa Cruz, CA 95060



Shauna Soldate

Shauna.Soldate@santacruzcounty.us

12/07/2023

Date

County of Santa Cruz
 General Services Department
 Purchasing Division
 701 Ocean Street, Room 330, Santa Cruz, CA 95060-4073
 (831) 454-2210 Fax: (831) 454-2710 TDD: 711

Buyer: Shauna M. Soldate, Senior Buyer

RFP # 23P3-005, 23P3-006, 23P3-007, 23P3-008, 23P3-009, 23P3-010

Name: Job Order Contracting Multi-Bid Yearly Solicitations

Date and time of Mandatory Web Conference: 11/28/23, 9:00 AM, Pacific Time

Web Conference Vendor List				
	Name (First/Last)	Company Name	Email	Attended?
1	Denis Klimov	99 North Construction & Plumbin	climovdenis@icloud.com	Yes
2	Brandon Gilbert	Able Construction Group	brandon@ableseptic.com	Yes
3	David Olson	Airtec Services	daveo@airtecservice.com	Yes
4	Bill Richards	Andy's Roofing	bill@andysroofing.com	Yes
5	Saida Lopez	Andy's Roofing	saida@andysroofing.com	Yes
6	Trish Sly	Andy's Roofing	Trish@andysroofing.com	Yes
7	Peter Park	Angeles Contractor Inc	Peterp@angelescontractor.com	Yes
8	Manuel Perez	Atlantis Paving	estimator@atlantispaving.com	Yes
9	Ryan Rittenhouse	Atlantis Paving	ryan@atlantispaving.com	Yes
10	Troy Fink	Ausonio Inc	troy@ausonio.com	Yes
11	Mike Newman	B&M Tear Off Inc	miken196619@gmail.com	Yes
12	Myris Guballa	Best Contracting Services	mguballa@bestcontracting.com	Yes
13	Billy Mulcaire	Cen-Con Inc	billy@cen-con.com	Yes
14	Eric Tonneson	Collins Electrical Company	etennesen@collinselectric.com	Yes
15	Justin Gutfeld	Corvid Electric	corvidelectric@gmail.com	Yes
16	Juan Romero	Don Chapin Co.	jromero@donchapin.com	Yes
17	Fredo Rouhisalout	EMCOR Services Mesa Energy	frouhisalout@emcor.net	Yes
18	Zach Blake	EMCOR Services Mesa Energy	zblake@emcor.net	Yes
19	(Renee) Jihyo Jang	Exbon Development	jihyo.jang@exbon.com	Yes
20	Byungchun Lee	Exbon Development	byungchun.lee@exbon.com	Yes
21	Adam Faville	Garland Company	afaville@garlandco.com	Yes
22	Jack Irwin	Geo. H Wilson	jirwin@accoes.com	Yes
23	Jackson McGrath	Geo. H Wilson	jmcgrath@accoes.com	Yes
24	Tony A Fini	Geo. H Wilson	tfini@accoes.com	Yes
25	Ryan Rodriguez	Get Piped Plumbing	ryan@getpiped.plumbing	Yes
26	James Bennett	Granite Construction	james.bennett@gcinc.com	Yes
27	Antonio Chavez Gor	Graniterock Construction	agonzalez@graniterock.com	Yes
28	Cindy Short	Graniterock Construction	cshort@graniterock.com	Yes
29	Melinda Berge	JJ Albanese Inc	mberge@jjalbanese.com	Yes
30	Sam Stephens	Kinetics Mechanical Service	Sstephens@KMS-inc.com	Yes
31	Kyle Triacca	KT Mechanical	Kyle@ktmechanical.com	Yes
32	Tyler Verdun	Mark Scott Construction Inc	tverdun@msconstruction.com	Yes
33	Larry Montano	Montano Plumbing	larry@montanoplumbing.com	Yes
34	Darin Terrazas	Newton Construction	darin@newtonconstruction.com	Yes
35	Adam Dybddahl	OEG Inc	Adam.Dybdahl@oeg.us.com	Yes
36	Juan Alvarez	Overhaul Construction	overhaul_construction@yahoo.com	Yes
37	Jessica Timoteo	Palisade Builders	jtimoteo@palisadebuilders.com	Yes
38	Courtney Wolfe	Papich Construction	cwolfe@papichconstruction.com	Yes
39	Emigdio Robles	Patriot Contracting	erobles@patriotcontracting.us	Yes
40	Mohammad Beigi	Patriot Contracting	mbeigi@patriotcontracting.us	Yes
41	Omid Ranaghinia	Patriot Contracting	oronaghinia@patriotcontracting.us	Yes
42	Kiana Quintana	Quincon Inc	Jose@quinconinc.com	Yes
43	Tom Scheel	Staples Construction	tscheel@staplesconstruction.com	Yes
44	Russ Hague	Teichert Construction	rhague@teichert.com	Yes
45	Randy Lewis	Veterans Construction	rlewis@veteranscd.com	Yes
46	Josue Garcia	VH Construction & Plumbing	josue@genesissv.com	Yes
47	Victor Horta	VH Construction & Plumbing	vhconstructionplumbinginc@gmail.com	Yes
48	Kyle Carhart	Waterproofing Associates	kyle@roofwa.com	Yes

County of Santa Cruz
General Services Department
JOB ORDER CONTRACTING (JOC)
November 28, 2023



Pre-Bid Web Conference Agenda

PART I: JOC OVERVIEW, CONTRACT DOCUMENTS, SOLICITATION DETAILS

1. Introductions
2. JOC Overview
3. JOC Benefits
4. JOC Process
5. The Contract Documents
 - a. Front End Documents
 - b. Construction Task Catalog® (CTC) – Understanding the “Big Note.”
 - c. Non-Pre-Priced Tasks
 - d. Technical Specifications
 - e. Software: eGordian
 - f. 1% Contractor License Fee
6. Solicitation Details

Pre-Bid Conference Agenda

PART II: BID FACTORS & CONSIDERATIONS

1. Adjustment Factors
2. Method to Calculate
3. Sample Price: CTC vs. Quote
4. Filling Out the Bid Form
5. Bid Considerations
6. Review of Key Points
7. Bid Submission
8. Questions

Introduction – JOC

- Job Order Contracting (JOC) is an on-call construction services contract where construction work and performance is determined by issuing Job Orders with the contractor during a fixed period of time (one year).
- The individual projects defined by each Job Order will be at different locations and facilities under the jurisdiction of the County. JOC is typically used for small to medium sized repair and rehabilitation work, replacement in kind projects, and minor new construction.
- The contract documents include a Construction Task Catalog[®] containing pre-priced tasks for construction work with preset unit prices. All unit prices are based on local labor, material and equipment costs and are for the direct cost of construction.

Introduction – Contracts

- County of Santa Cruz – General Services Department has advertised:
 - **(4) General Construction - B license**, JOC Contract with a minimum contract opportunity of \$25,000 and Maximum Contract Value of **\$5,797,725 each** as allowed per PCC
 - **(3) Paving / Horizontal Construction – A license** – minimum contract opportunity of \$25,000 and Maximum Contract Value of **\$5,797,725 each** as allowed per PCC
 - **(2) Mechanical Construction - C-20** - minimum contract opportunity of \$25,000 and Maximum Contract Value of **\$5,797,725 each**
 - **(2) Roofing – C-39** - minimum contract opportunity of \$25,000 and Maximum Contract Value of **\$5,797,725 each**
 - **(2) Electrical – C-10** - minimum contract opportunity of \$25,000 and Maximum Contract Value of **\$5,797,725 each**
 - **(2) Plumbing – C-36** - minimum contract opportunity of \$25,000 and Maximum Contract Value of **\$5,797,725 each**

Introduction-Contracts

- Contract term will be for one (1) year
- Work Will Be Issued Under the Job Order Contracting Program.
- Work Will Be Administered by the General Services Department.
- Gordian will Administer JOC contracts and Support the County as well as all JOC Contractors.

JOC Overview

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.

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 of Santa Cruz
 - 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 need to negotiate for each individual job.
 - 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 The County

- 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 Any Other Approved Methods to Complete Projects

JOC Overview:

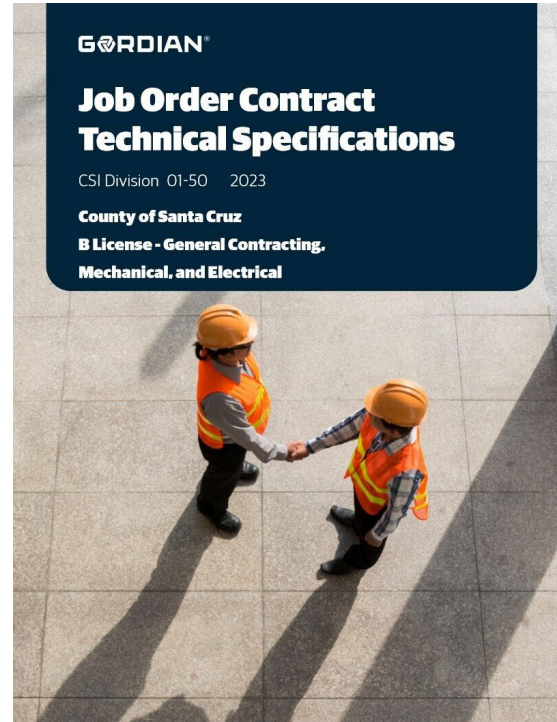
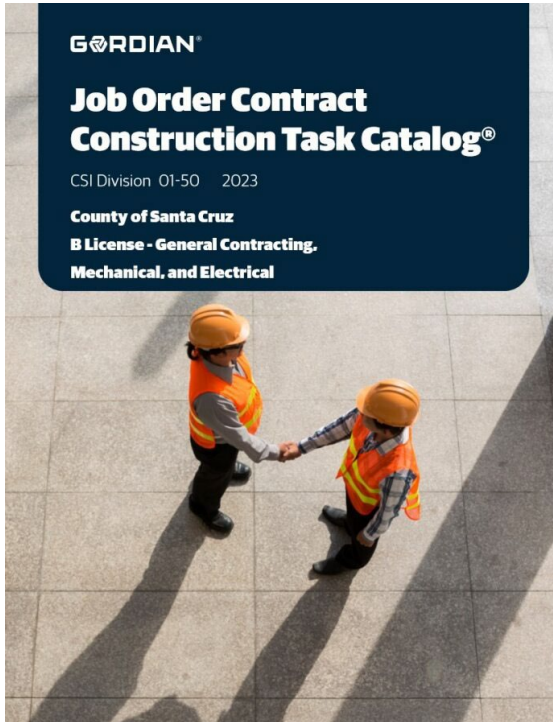
Why JOC Works For The County

- Increases use of local 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
- 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

JOC Overview: The Process



The Contract Documents



- **Part One:** Instructions and Execution Documents
- **Part Two:** Terms and Conditions
- **Part Three:** The Construction Task Catalog®
- **Part Four:** The Technical Specifications

The Contract Documents: Front End Documents

Part One and Two

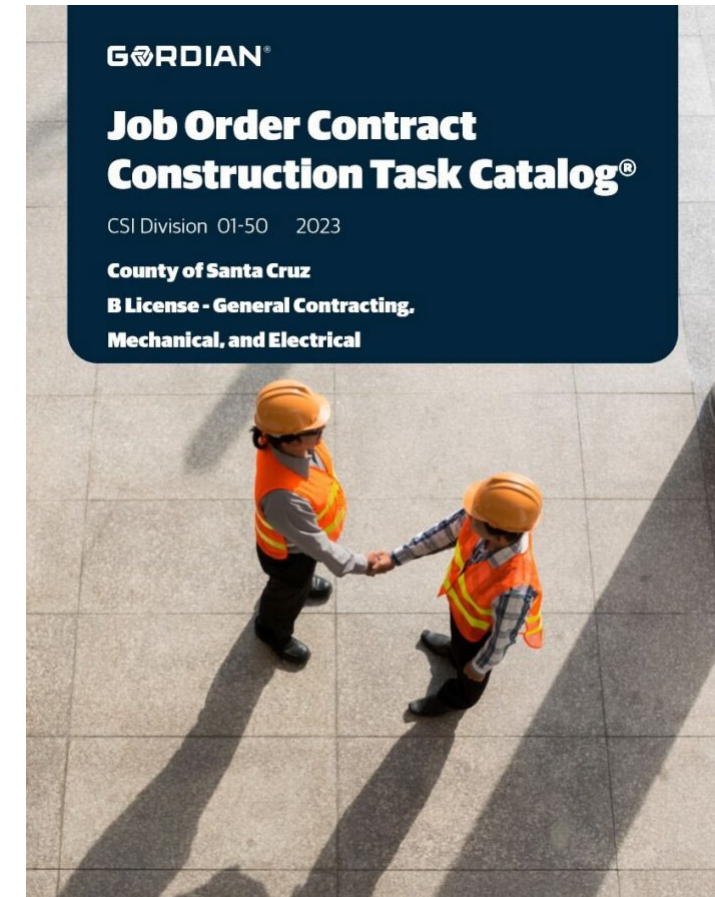
- Invitation
- Instructions to Respondents
- Standard Terms and Conditions
- Bid Forms
- Attachments and Exhibits

Description	Reference #	Contact:	Due Date & Time:
Job Order Contracting	Reference #	Shauna Soldate	Friday, December 15, 2023, by 5:00 PM Pacific Time
Roofing	23P3-005	Shauna.Soldate@santacruzcountyca.gov	
General Contracting	23P3-006		
Horizontal Paving	23P3-007		
Mechanical Construction	23P3-008		
Plumbing	23P3-009		
Electrical	23P3-010		

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® “The Big Note”

- 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®

About the CTC:

- ☐ This Construction Task Catalog® (CTC) was developed and customized by The Gordian Group, Inc. specifically for County of San Benito, priced locally using current labor, material and equipment costs, and published in June 2022.
- ☐ 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 Benito. 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.

MasterFormal™

- ☐ The Tasks in this CTC are organized using CSI's MasterFormal.

CSi

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.

2022
County of San Benito, a Licensee

Using The Construction Task Catalog®

EQUIPMENT COSTS:

- ☐ Equipment costs include all equipment required to accomplish the Task.
- ☐ Mobilization is included for large equipment (e.g. excavators, backhoes, etc.) and mobilization.
- ☐ Equipment costs include such as fuel, electricity, etc.

MATERIAL COSTS:

- ☐ Material costs include delivery, and all incidentals to the installation.
- ☐ Material costs include fabricator's shop drawings.
- ☐ Material costs for roofing covering, ceiling tile, etc. include an allowance intended to be all inclusive types of construction sold in standard lengths.
- ☐ Material costs for aggregate, sand, soil, etc. 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, personnel, office supplies, and transportation.
- ☐ Insurance and bonding.
- ☐ Profit.

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MasterFormal™

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CSi

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.

2022
County of San Benito, a Licensee

Using The Construction Task Catalog®

EQUIPMENT COSTS:

- ☐ Equipment costs include all equipment required to accomplish the Task.
- ☐ Mobilization is included for 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®

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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MasterFormat™

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CSI

MasterFormat™

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.
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- ☑ Material costs for imported materials (e.g. aggregate, sand, soil, etc.) include delivery up to 15 miles from the closest approved source.

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.

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®

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®

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MasterFormat™

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CS

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 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.
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- ☑ Insurance and bonding.
- ☑ Profit.

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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.

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 Benito, priced locally using current labor, material and equipment costs, and published in June 2022.
- ☑ 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 Benito. 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

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 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.

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®

Exterior Improvements		32
Bases, Ballasts, And Paving		32 10
Unit Paving		32 14

32

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 13-00-8 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

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.

			Custom Standards And Assemblies 50		50
			CALTRANS Custom Standards And Assemblies 50 89		
			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 <small>(50)</small>					
50 89 80 CALTRANS Construction Performance Requirements <small>(50 89)</small>					
<small>Note: Refer to www.dot.ca.gov for CALTRANS Standard Plans and Specifications</small>					
50 89 81 CALTRANS DIVISION I - GENERAL PROVISIONS <small>(50 89 81)</small>					
50 89 81 01 PAYMENT <small>(50 89 81)</small>					
<small>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.</small>					
50 89 81 01-0001	EA	CALTRANS 999990 MOBILIZATION.....			
<small>Note: (One Time Per Job) See CSI section 01 71 13 00-0000 for mobilization of equipment.</small>					
50 89 82 CALTRANS DIVISION II - GENERAL CONSTRUCTION <small>(50 89 82)</small>					
50 89 82 12 TEMPORARY TRAFFIC CONTROL <small>(50 89 82)</small>					
<small>Note: Includes flagging, apparel, temporary traffic control devices, and equipment for flaggers, must comply with the latest California MUTCD per CALTRANS Standard.</small>					
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: 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.
- Provide justification for less than three (3) Quotes.
- Contractor is paid the amount in the following formula:

For Non-Prepriced Task Performed with Contractors own forces:

A = The hourly rate for each trade classification not in the CTC supported by 3 quotes, multiplied by the quantity.

B = The hourly, weekly, or monthly rate for each piece of equipment not in CTC supported by 3 quotes, multiplied by the quantity.

C = Lowest of three independent quotes for all materials.

Total Cost for self-performed work = (A+B+C) x appropriate Normal Working Hours Adjustment Factor.

For Non-Prepriced Task Performed by subcontractors:

- If the Non-Prepriced Task will be subcontracted, the Contractor must submit three (3) independent quotes for the work.

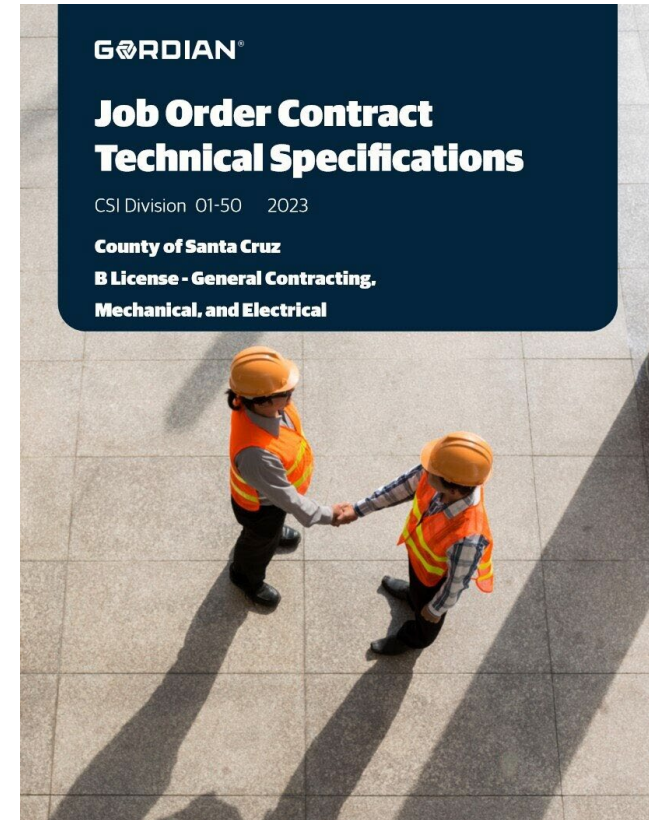
D = Lowest of three (3) subcontractor quotes

Total for Non-Prepriced Tasks performed by subcontractors = D x appropriate Normal Working Hours Adjustment Factor

The Contract Documents

Part Four – The Technical Specifications

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



Software: Gordian Cloud

Internet Based Software Provided with Contract

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

Orders						
	Job Order Name	Contract Name	Status	Price Proposal Total	Last Updated	Last Updated By
ctionTest001	ReportActionTes...	ReportActions001	Project Initiation		03/14/2019	r.yenugu@thegordiangroup.com
	job2n	Release Demo Contract	Proposal Due		03/14/2019	procontractor@gmail.com
	job1	ecc9a903-67a4-45a4-86e8-6d100d6682d7	Project Initiation		03/14/2019	procontractor@gmail.com
pProject	NewNppProject	Release Demo Contract	Proposal Due		03/14/2019	k.krishnamurthy@thegordiangr
KT	AdarshKT	AdarshKTJOC	Proposal Due		03/14/2019	k.krishnamurthy@thegordiangr
issue2	modifierissue2	2A520BA9-0157-47BB-9D7D-6D307A022A95	Proposal Approved		03/14/2019	k.krishnamurthy@thegordiangr
ction_Test111	ReportAction_Te...	Release Demo Contract	Project Initiation		03/13/2019	r.yenugu@thegordiangroup.com
	jotoapprove	Release Demo Contract	Proposal Approved		03/13/2019	k.krishnamurthy@thegordiangr
CheckVersionTotalls...	NewJOCheVer...	Release Demo Contract	Proposal Approved		03/12/2019	k.krishnamurthy@thegordiangr

1 2 3 4 ▶ » 1 - 50 of 17

1% Contractor License Fee

- Access to JOC Software, 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

Solicitation Details

- Award Based on Competitive Bid
 - Must Bid 7 Adjustment Factors:
 1. Normal Working Hours Adjustment Factor (General Facilities): Monday through Friday 7:00 am to 4:00 pm except County holidays. (30%)
 2. Other Than Normal Working Hours Adjustment Factor (General Facilities): Monday through Friday 4:01 pm to 6:59 am and all-day Saturday, Sunday and County holidays (10%)
 3. Normal Working Hours Adjustment Factor (Secured Facilities): Monday through Friday 7:00 am to 4:00 pm except County holidays. (15%)
 4. Other Than Normal Working Hours Adjustment Factor (Secured Facilities): Monday through Friday 4:01 pm to 6:59 am and all-day Saturday, Sunday and County holidays. (10%)
 5. Normal Working Hours Adjustment Factor (OSHPD Facilities): Monday through Friday 7:00 am to 4:00 pm except County holidays. (15%)
 6. Other Than Normal Working Hours Adjustment Factor (OSHPD Facilities): Monday through Friday 4:01 pm to 6:59 am and all-day Saturday, Sunday and County holidays. (10%)
 7. All hours Emergency Work Adjustment Factor: In any Facility (10%)
 - 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

Solicitation Details

- Prior to Bidding, the Client Cannot:
 - Identify or Commit to any Specific Project or Location
 - Identify or Commit to any Specific CTC Tasks or Quantities

Solicitation Details –

Contract	Contract Type	Minimum Contract Value	Estimated Maximum Annual Contract Value	Maximum Total Contract Term	Maximum Contract Value – Per CA CPI	Bid Bond	Initial Payment & Performance Bonding (Each)
JOCGC-001,002,003,004	General Construction “B”	\$25,000	\$5,797,725	1 Year	\$5,797,725	\$25,000	\$1,000,000
JOC-001,002,003	Paving/ Horizontal Construction	\$25,000	\$5,797,725	1 Year	\$5,797,725	\$25,000	\$1,000,000
JOCM 001 & 002	Mechanical Construction	\$25,000	\$5,797,725	1 Year	\$5,797,725	\$25,000	\$1,000,000
JOCR 001 & 002	Roofing	\$25,000	\$5,797,725	1 Year	\$5,797,725	\$25,000	\$1,000,000
JOCE 001 & 002	Electrical	\$25,000	\$5,797,725	1 Year	\$5,797,725	\$25,000	\$1,000,000
JOCPL 001 & 002	Plumbing	\$25,000	\$5,797,725	1 Year	\$5,797,725	\$25,000	\$500,000

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

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 - Inclusions

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® “The Big Note” document for comprehensive list of Inclusions**

Adjustment Factors -

Must Bid 7 Adjustment Factors:

1. Normal Working Hours Adjustment Factor (General Facilities):
2. Other Than Normal Working Hours Adjustment Factor (General Facilities)
3. Normal Working Hours Adjustment Factor (Secured Facilities)
4. Other Than Normal Working Hours Adjustment Factor (Secured Facilities)
5. Normal Working Hours Adjustment Factor (OSHPD Facilities)
6. Other Than Normal Working Hours Adjustment Factor (OSHPD Facilities)
7. All hours Emergency Work Adjustment Factor: In any Facility

Calculating the Adjustment Factors: Method to Calculate

Use Historical Project Data

- Select a Completed Project - You Know Scope and Direct Costs

Proposal Building

- Price out the Project From CTC
- Add on Overhead and Profit
- Calculate the Adjustment Factor
- Select multiple projects that you are familiar with based on your trade

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 exit 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: P1200017A Honokaa Elementary Portable P2 (P3028) Reroof Total: \$139,283.95 Return to Job Order

Summary Detail Spreadsheet Compare Versions Spreadsheet Review Catalog History

All Items Columns

This is a read-only view.

<input checked="" type="checkbox"/>		CSI Number	Description	User Notes	UOM	Line Total	Their Response	Your Suggestion	Reason Comment
			01 General Requirements						
<input type="checkbox"/>			NPP for Demo		CY	\$305.32	Accepted	Accepted	Type note...
<input type="checkbox"/>		012216000004	Negotiated Travel Costs Off Oahu Island		EA	\$20.36	Accepted	Accepted	Type note...
<input type="checkbox"/>		012220000002	Asbestos Removal Worker		HR	\$985.05	Accepted	Accepted	Type note...
		Modifier 0004	For Foreman, Add			\$73.88			
<input type="checkbox"/>		012220000002	Asbestos Removal Worker		HR	\$985.05	Accepted	Accepted	Type note...
		Modifier 0004	For Foreman, Add			\$73.88			
			07 Thermal And Moisture Protection						
<input type="checkbox"/>		070130990010	Remove Damage, Replace And Finish Wood Shingles		CSF	\$7,164.28	Accepted	Accepted	Type note...
			11 Equipment						
<input type="checkbox"/>		110110130008	18' Aluminum Arm Replacement With Bolts		EA	\$17,895.71	Accepted	Accepted	Type note...
<input type="checkbox"/>		110110130008	18' Aluminum Arm Replacement With Bolts		EA	\$29,826.18	Accepted	Accepted	Type note...
<input type="checkbox"/>		110110130008	18' Aluminum Arm Replacement With Bolts		EA	\$17,895.71	Accepted	Accepted	Type note...

Calculating the Adjustment Factors: 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

Calculating the Adjustment Factors: 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.

Resources – Contractor Landing Page – Gordian Website

GORDIAN[®]

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How to Become a Job Order Contracting (JOC) Contractor

Gordian's **Job Order Contracting (JOC)** solutions create a unique partnership between you, the contractor, the owner and Gordian. We want your business to grow and succeed, and we can help you get there.

GET MORE INFO



"It's allowed our company to virtually double in size. The biggest success we have seen is repeat business, clients saying that was easy and we want to do it again."

Kevin Johnson | Vice President, Johnson-Laux Construction

For Decades, the Gordian Team Has Helped Contractors Succeed and Grow Their Business Through JOC.

From initial project request to construction completion, qualified contractors are motivated to provide stellar service to owners. Gordian's Construction Task Catalog[®] (CTC), a custom Unit Price Book, provides preset pricing, and each project follows a proven five-step JOC process that removes scope ambiguity. This saves time, maximizes resources and puts the emphasis back on the important things: completing quality work and creating lasting relationships.



More Opportunities for Work

JOC is an Indefinite Delivery Indefinite Quantity (IDIQ) construction delivery method that allows many projects to be completed through a single, competitively-awarded contract. If you're awarded a JOC contract, you'll have the opportunity for a steady stream of work. The single-bid process enables projects to start faster, which means less administrative overhead and more work for you and your team.

One Method, Multiple Ways to Get Involved

There are multiple ways to become a Gordian JOC contractor. Some owners prefer to have their own JOC program, and others access Job Order Contracts through cooperative purchasing networks via our **eZIQC[®] solution**. Both are great opportunities to form collaborative, long-lasting partnerships with owners.



www.gordian.com/joccontractor

GORDIAN[®]

Adjustment Factor Training-Gordian Website

How to Calculate a JOC Adjustment Factor



By Gordian

Gordian's Job Order Contracting (JOC) is an indefinite delivery, indefinite quantity (IDIQ) construction delivery method that allows many projects to be completed through a competitively awarded contract. Widely popular in the public sector, this single-solicitation process is a stretch from how contractors are accustomed to bidding work.

With JOC, Adjustment Factors (commonly called coefficients) are the primary criteria owners evaluate to award contractors, so it is vital that contractors are well-versed in creating and applying them. This post explores best practices for calculating a JOC Adjustment Factor, including the costs that must be part of a realistic and successful Adjustment Factor, and applying the Adjustment Factor to a bid.

Let's start with the basics.

What is a JOC Adjustment Factor?

To obtain an award for a Gordian Job Order Contract, prospective contractors bid an Adjustment Factor on a unit price book with preset prices called a Construction Task Catalog® or CTC for short. The CTC is used to identify necessary line items to build a price proposal for each and every Gordian JOC project. In effect, by applying the Adjustment Factor, a contractor is saying "This is how much I need to be paid for these tasks to turn a profit."

Calculating an Adjustment Factor is just one facet of becoming a Gordian JOC contractor. [Visit this page to get more info and learn how a Gordian JOC program can help you expand your business.](#)

Before You Calculate a JOC Adjustment Factor

Before you begin developing your Adjustment Factor, we recommend reviewing the first six pages of the CTC, an introduction titled "Using the Construction Task Catalog." Those familiar with Gordian JOC may have heard it referred to as The Big Note. Whatever you call this section, these first six pages are important for you to get familiar with because they establish the rules for a Gordian Job Order Contract. This introduction outlines several critical pieces of information, including what is and what is not included in a JOC Adjustment factor. Following these rules may decide whether you are awarded a contract and how much you stand to profit from a JOC program.

Get an idea of what's in a typical CTC introduction by downloading an example using the button below.

DOWNLOAD SAMPLE INTRODUCTION

www.gordian.com/joccontractor

Using your overhead costs, profit, direct costs from historical projects and price from the CTC, **amounts and percentages**. Boxes C, E, F and H will populate automatically.

A: Direct Cost of Work

B: Overhead (as a %)

C: Overhead (in \$)

D: Profit (as a %)

E: Profit (in \$)

F: Subtotal (Direct Cost + Overhead + Profit)

G: Price from CTC

H: Adjustment Factor

Filling Out the Bid Form

	Adjustment Factor Name	Adjustment Factor Bid	X Multiplier	=Extended Total
1.	Normal Working Hours Adjustment Factor in General Facilities	<u>1</u> <u>1</u> <u>8</u> <u>5</u> <u>5</u>	X 0.30	= <u>0</u> <u>3</u> <u>5</u> <u>5</u> <u>6</u>
2.	Other Than Normal Working Hours Adjustment Factor in General Facilities	<u>1</u> <u>2</u> <u>0</u> <u>3</u> <u>4</u>	X 0.10	= <u>0</u> <u>1</u> <u>2</u> <u>0</u> <u>3</u>
3.	Normal Working Hours Adjustment Factor in Secured Facilities	<u>1</u> <u>2</u> <u>3</u> <u>4</u> <u>4</u>	X 0.15	= <u>0</u> <u>1</u> <u>8</u> <u>5</u> <u>1</u>
4.	Other Than Normal Working Hours Adjustment Factor in Secured Facilities	<u>1</u> <u>2</u> <u>6</u> <u>8</u> <u>5</u>	X 0.10	= <u>0</u> <u>1</u> <u>2</u> <u>6</u> <u>8</u>
5.	Normal Working Hours Adjustment Factor in OSHPD Facilities	<u>1</u> <u>2</u> <u>3</u> <u>4</u> <u>4</u>	X 0.15	= <u>0</u> <u>1</u> <u>8</u> <u>5</u> <u>1</u>
6.	Other Than Normal Working Hours Adjustment Factor in OSHPD Facilities	<u>1</u> <u>2</u> <u>0</u> <u>3</u> <u>4</u>	X 0.10	= <u>0</u> <u>1</u> <u>2</u> <u>0</u> <u>3</u>
7.	All Emergency Work Adjustment Factor in any Facility	<u>1</u> <u>2</u> <u>6</u> <u>8</u> <u>5</u>	X 0.10	= <u>0</u> <u>1</u> <u>2</u> <u>6</u> <u>7</u>
8.	Sum the Extended Total column. The Sum is the Award Criteria Figure.			= <u>1</u> <u>2</u> <u>1</u> <u>9</u> <u>9</u>

* Sample only

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 Job Order is a Contractor License Fee for Gordian proprietary 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

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

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
- 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 (Per Section 5 of the RFP):
 1. Letter of Transmittal
 2. Services offered
 3. Contractor approach
 4. Completed Bid Form
 5. Resumes of Contractor Team
 6. Completed Exhibits A,B,D,E and F
 7. Addendum Acknowledgement

Bid Submission Questions

- **Per Section 2.3 b., RFP Process Schedule:** During the Pre-Proposal Web Conference, County representatives will attempt to answer questions that can be immediately answered; however, verbal responses made at the Pre-Proposal Web Conference will be non-binding on County. To formalize, Proposer must submit questions in writing to the Buyer following the Pre-Proposal Web Conference. The Buyer will disseminate written questions and answers in the form of an addendum
- Review the Bid Documents for Bid Submission Directions
- Confirm the Record of your Attendance at this Pre-Bid Meeting
- **Submit questions to:**
 - **All** questions, inquiries, or any other communication relating to this project shall be asked via email to Shauna Soldate, Senior Buyer at shauna.soldate@santacruzcountyca.gov
 - All inquiries must be received by the County no later than **December 01, 2023, at 5:00 PM.**

Bid due date is December 15, 2023, at 5:00 PM PST

Submit 1 hardcopy original and 1 electronic version of the proposal on a USB drive and deliver to:

General Services Department - Purchasing Division
Attn: Shauna Soldate
701 Ocean Street, 3rd floor, Room 330
Santa Cruz, CA 95060

THANK YOU FOR ATTENDING

BIDS DUE

December 15, 2023, at 5:00 PM

