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
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
<table>
<thead>
<tr>
<th>Name (First/Last)</th>
<th>Company Name</th>
<th>Email</th>
<th>Attended?</th>
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<tbody>
<tr>
<td>Denis Climov</td>
<td>99 North Construction &amp; Plumbi</td>
<td><a href="mailto:climovdenis@icloud.com">climovdenis@icloud.com</a></td>
<td>Yes</td>
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<tr>
<td>Brandon Gilbert</td>
<td>Able Construction Group</td>
<td><a href="mailto:brandon@ableseptic.com">brandon@ableseptic.com</a></td>
<td>Yes</td>
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<tr>
<td>David Olson</td>
<td>Airtac Services</td>
<td><a href="mailto:daveo@airtecservice.com">daveo@airtecservice.com</a></td>
<td>Yes</td>
</tr>
<tr>
<td>Bill Richards</td>
<td>Andy's Roofing</td>
<td><a href="mailto:bill@andysroofing.com">bill@andysroofing.com</a></td>
<td>Yes</td>
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<tr>
<td>Saída Lopez</td>
<td>Andy's Roofing</td>
<td><a href="mailto:saida@andysroofing.com">saida@andysroofing.com</a></td>
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<tr>
<td>Trish Sly</td>
<td>Andy's Roofing</td>
<td><a href="mailto:Trish@andysroofing.com">Trish@andysroofing.com</a></td>
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<tr>
<td>Peter Park</td>
<td>Angeles Contractor Inc</td>
<td><a href="mailto:peterp@angelescontractor.com">peterp@angelescontractor.com</a></td>
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<tr>
<td>Manuel Perez</td>
<td>Atlantis Paving</td>
<td><a href="mailto:estimator@atlantispaving.com">estimator@atlantispaving.com</a></td>
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<tr>
<td>Ryan Rittenhouse</td>
<td>Atlantis Paving</td>
<td><a href="mailto:ryan@atlantispaving.com">ryan@atlantispaving.com</a></td>
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<tr>
<td>Troy Fink</td>
<td>Ausonio Inc</td>
<td><a href="mailto:troy@ausonio.com">troy@ausonio.com</a></td>
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<tr>
<td>Mike Newman</td>
<td>B&amp;M Tear Off Inc</td>
<td><a href="mailto:miken196619@gmail.com">miken196619@gmail.com</a></td>
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<tr>
<td>Myris Guballa</td>
<td>Best Contracting Services</td>
<td><a href="mailto:mguballa@bestcontracting.com">mguballa@bestcontracting.com</a></td>
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<tr>
<td>Billy Mulcaire</td>
<td>Cen-Con Inc</td>
<td><a href="mailto:billy@cen-con.com">billy@cen-con.com</a></td>
<td>Yes</td>
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<tr>
<td>Eric Toneson</td>
<td>Collins Electrical Company</td>
<td><a href="mailto:etonesen@collinselectric.com">etonesen@collinselectric.com</a></td>
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<tr>
<td>Justin Gutfield</td>
<td>Corvid Electric</td>
<td><a href="mailto:corvidelectric@gmail.com">corvidelectric@gmail.com</a></td>
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<tr>
<td>Juan Romero</td>
<td>Don Chapin Co.</td>
<td><a href="mailto:jromero@donchapin.com">jromero@donchapin.com</a></td>
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<tr>
<td>Fredo Rouhisalout</td>
<td>EMCOR Services Mesa Energy</td>
<td><a href="mailto:frouhisalout@emcor.net">frouhisalout@emcor.net</a></td>
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<tr>
<td>Zach Blake</td>
<td>EMCOR Services Mesa Energy</td>
<td><a href="mailto:zblake@emcor.net">zblake@emcor.net</a></td>
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<tr>
<td>(Renee) Jihyo Jang</td>
<td>Exxon Development</td>
<td><a href="mailto:jihyo.jang@exxon.com">jihyo.jang@exxon.com</a></td>
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<tr>
<td>Byungchun Lee</td>
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<td><a href="mailto:byungchun.lee@exxon.com">byungchun.lee@exxon.com</a></td>
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<tr>
<td>Adam Faville</td>
<td>Garland Company</td>
<td><a href="mailto:afaville@garlandco.com">afaville@garlandco.com</a></td>
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<tr>
<td>Jack Irwin</td>
<td>Geo. H Wilson</td>
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<tr>
<td>Jackson McGrath</td>
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<tr>
<td>Tony A Fini</td>
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<tr>
<td>Ryan Rodriguez</td>
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<td><a href="mailto:ryan@getpiped.plumbing">ryan@getpiped.plumbing</a></td>
<td>Yes</td>
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<tr>
<td>James Bennett</td>
<td>Granite Construction</td>
<td><a href="mailto:james.bennett@gcinc.com">james.bennett@gcinc.com</a></td>
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<tr>
<td>Antonio Chavez Gor</td>
<td>Graniterock Construction</td>
<td><a href="mailto:agonzalez@graniterock.com">agonzalez@graniterock.com</a></td>
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<td>Cindy Short</td>
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<td>Melinda Berge</td>
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<td>Sam Stephens</td>
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<tr>
<td>Kyle Triacca</td>
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<td>Tyler Verdun</td>
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<td>Larry Montano</td>
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<td>Russ Hague</td>
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<td>Randy Lewis</td>
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<td>Josue Garcia</td>
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<td>Kyle Carhart</td>
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<td><a href="mailto:kyle@roofwa.com">kyle@roofwa.com</a></td>
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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
- Owner Project B
- 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

1. Joint Scope Meeting
2. Request for Proposal
3. Proposal Development
4. Proposal Review
5. Issue Job Order
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
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
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
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.
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.
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 Contract Documents: Construction Task Catalog®
## The Contract Documents: Construction Task Catalog®

### Include All Appropriate Tasks:

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<td>31 23 16 36-0028</td>
<td>Loading Excess Materials</td>
<td>CY</td>
<td>13.75</td>
<td>$3.42</td>
<td>$47.03</td>
</tr>
<tr>
<td></td>
<td>For Quantities Under 20 CY, Add</td>
<td>CY</td>
<td>13.75</td>
<td>$3.42</td>
<td>$47.03</td>
</tr>
<tr>
<td>01 74 19 00-0029</td>
<td>Hauling to Dump Site</td>
<td>CYM</td>
<td>207</td>
<td>$0.51</td>
<td>$105.57</td>
</tr>
<tr>
<td>01 74 19 00-0021</td>
<td>Landfill Dump Fee</td>
<td>CY</td>
<td>13.75</td>
<td>$15.14</td>
<td>$208.18</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$4,056.93</td>
</tr>
</tbody>
</table>

* Sample only

Compare these prices
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.

<table>
<thead>
<tr>
<th>Minor</th>
<th>C/S</th>
<th>UOM Description</th>
<th>Total Direct</th>
<th>Total Demol</th>
<th>Unit Cost</th>
<th>Unit Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>50</td>
<td>Custom Standards And Assemblies</td>
<td>CALTRANS Construction Performance Requirements</td>
<td>CALTRANS DIVISION I - GENERAL PROVISIONS</td>
<td>PAYMENT</td>
<td>MOBILIZATION</td>
</tr>
</tbody>
</table>

Note: Includes equipment mobilization, hauling over 25 miles, overtime, specialty labor, specialty, equipment, reimbursable fees and permits per CALTRAN Standard. See CSI section 01 22 16 00 0003 for Reimbursable Fees and Permits per CALTRAN Standard.
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 = \((A+B+C) \times \text{appropriate Normal Working Hours Adjustment Factor}\).

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 = \(D \times \text{appropriate Normal Working Hours Adjustment Factor}\)
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
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 –

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

<table>
<thead>
<tr>
<th>Job Order: P1200017A Honokaa Elementary Portable P2 (P3028) Reroof</th>
<th>Total: $139,283.95</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>CSI Number</th>
<th>Description</th>
<th>User Notes</th>
<th>UOM</th>
<th>Line Total</th>
<th>Their Response</th>
<th>Your Suggestion</th>
<th>Reason Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1</td>
<td>NPP for Demo</td>
<td></td>
<td>CY</td>
<td>$305.32</td>
<td>Accepted</td>
<td>Accepted</td>
<td>Type note...</td>
</tr>
<tr>
<td>012216000564</td>
<td>Negotiated Travel Costs Off Oahu Island</td>
<td>EA</td>
<td>$234.36</td>
<td>Accepted</td>
<td>Accepted</td>
<td>Type note...</td>
<td></td>
</tr>
<tr>
<td>012210000000</td>
<td>Asbestos Removal Worker</td>
<td>HR</td>
<td>$960.05</td>
<td>Accepted</td>
<td>Accepted</td>
<td>Type note...</td>
<td></td>
</tr>
<tr>
<td>0004</td>
<td>Far Foreman, Add</td>
<td></td>
<td></td>
<td>$73.88</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>012210000000</td>
<td>Asbestos Removal Worker</td>
<td>HR</td>
<td>$960.05</td>
<td>Accepted</td>
<td>Accepted</td>
<td>Type note...</td>
<td></td>
</tr>
<tr>
<td>0004</td>
<td>Far Foreman, Add</td>
<td></td>
<td></td>
<td>$73.88</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07</td>
<td>Thermal And Moisture Protection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>070130000000</td>
<td>Remove Damage, Replace And Finish Wood Shingles</td>
<td>CSIF</td>
<td>$7,164.2B</td>
<td>Accepted</td>
<td>Accepted</td>
<td>Type note...</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Equipment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>101101000000</td>
<td>1F Aluminum Arm Replacement With Bolts</td>
<td>EA</td>
<td>$17,995.71</td>
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<td>Accepted</td>
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<tr>
<td>101101000000</td>
<td>1F Aluminum Arm Replacement With Bolts</td>
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<td>$26,835.1B</td>
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<tr>
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<td>1F Aluminum Arm Replacement With Bolts</td>
<td>EA</td>
<td>$17,995.71</td>
<td>Accepted</td>
<td>Accepted</td>
<td>Type note...</td>
<td></td>
</tr>
</tbody>
</table>
Calculating the Adjustment Factors: Sample Price: CTC vs. Quote

<table>
<thead>
<tr>
<th>Direct Cost of Work from CTC</th>
<th>Direct Cost of Work from Quotes or Estimates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Replace Boiler</td>
<td>Replace Boiler</td>
</tr>
<tr>
<td></td>
<td>$33,055.73</td>
</tr>
<tr>
<td>Doors/Hardware</td>
<td>Doors/Hardware</td>
</tr>
<tr>
<td></td>
<td>$8,282.09</td>
</tr>
<tr>
<td>Lighting</td>
<td>Lighting</td>
</tr>
<tr>
<td></td>
<td>$13,119.77</td>
</tr>
<tr>
<td>Plumbing</td>
<td>Plumbing</td>
</tr>
<tr>
<td></td>
<td>$11,886.53</td>
</tr>
</tbody>
</table>

TOTAL = $66,344.12

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%* $6,500.00
- C. Subtotal (Cost & O/H) $71,500.00
- D. Profit 10%* $7,150.00
- 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.
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 immediate delivery Indefinite Quantity (IQD) 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-dollars process enables projects to start faster, which means less administrative overhead and more work for you and your teams.

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 ouretc® solution. Both see great opportunities to form collaborative, long-lasting partnerships with owners.

www.gordian.com/joccontractor
How to Calculate a JOC Adjustment Factor

By Gordon

Gordian's Job Order Contracting (JOC) is an indefinite-delivery, indefinite-quantity (IDQ) 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 in 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 (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.

www.gordian.com/joccontractor
# Filling Out the Bid Form

<table>
<thead>
<tr>
<th>Adjustment Factor Name</th>
<th>Adjustment Factor Bid</th>
<th>X Multiplier</th>
<th>=Extended Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Normal Working Hours Adjustment Factor in General Facilities</td>
<td>1 1 8 5 5</td>
<td>X 0.30</td>
<td>0 3 5 5 6</td>
</tr>
<tr>
<td>2. Other Than Normal Working Hours Adjustment Factor in General</td>
<td>1 2 0 3 4</td>
<td>X 0.10</td>
<td>0 1 2 0 3</td>
</tr>
<tr>
<td>Facilities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Normal Working Hours Adjustment Factor in Secured Facilities</td>
<td>1 2 3 4 4</td>
<td>X 0.15</td>
<td>0 1 8 5 1</td>
</tr>
<tr>
<td>4. Other Than Normal Working Hours Adjustment Factor in Secured</td>
<td>1 2 6 8 5</td>
<td>X 0.10</td>
<td>0 1 2 6 8</td>
</tr>
<tr>
<td>Facilities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Normal Working Hours Adjustment Factor in OSHPD Facilities</td>
<td>1 2 3 4 4</td>
<td>X 0.15</td>
<td>0 1 8 5 1</td>
</tr>
<tr>
<td>6. Other Than Normal Working Hours Adjustment Factor in OSHPD</td>
<td>1 2 0 3 4</td>
<td>X 0.10</td>
<td>0 1 2 0 3</td>
</tr>
<tr>
<td>Facilities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. All Emergency Work Adjustment Factor in any Facility</td>
<td>1 2 6 8 5</td>
<td>X 0.10</td>
<td>0 1 2 6 7</td>
</tr>
<tr>
<td>8. Sum the Extended Total column.</td>
<td></td>
<td></td>
<td>1 2 1 9 9</td>
</tr>
</tbody>
</table>

* Sample only

*The Sum is the Award Criteria Figure.*

---

**GORDIAN**
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

\[ \text{Unit Price} \times \text{Quantity} \times \text{Adjustment Factor} = \text{Total for Task} \]
\[ \text{Unit Price} \times \text{Quantity} \times \text{Adjustment Factor} = \text{Total for Task} \]
\[ \text{Unit Price} \times \text{Quantity} \times \text{Adjustment Factor} = \text{Total for Task} \]
\[ \text{Total Job Order Price} \]
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