

REVISION #01



REGIONAL ROOFING

JOB ORDER CONTRACT

CALIFORNIA STATE UNIVERSITY, OFFICE OF THE CHANCELLOR

Pre-Bid Presentation

Contracts: RJOCN-RF006 & RJOCS-RF006

February 27, 2023







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





Pre-Bid Presentation Agenda

- JOC Overview
- Solicitation Details
- JOC Bid Documents
- Revised General Conditions
- Understanding the Construction Task Catalog[®] (CTC)
- Contractor Adjustment Factors

- Risk of Low Adjustment Factors
- Calculating the Bid
- Bid Process
- JOC Process
- Bid Considerations & Review
- Due Dates
- Questions





Job Order Contract (JOC) Definition

Indefinite delivery/indefinite quantity (Umbrella) contract

Enables contractors to complete a substantial number of individual projects with a **single bid**

Tasks are based on guaranteed, preset prices



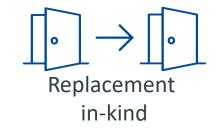


Types of Construction Projects

From one competitively awarded contract, you can complete an indefinite number of construction projects

















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





CSU Projects since 1999

More than \$500MM completed in work:

- Classroom remodels
- Science lab remodels
- Dorm Upgrades
- Roofing
- Mechanical & HVAC
- Electrical & lighting
- Parking lot repaving
- Locker room remodel





Contract Bid Documents





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



Front End Documents



- Notice to Contractors
- Bid Form (Sample)
- General Conditions Supplementary
- General Conditions Special Conditions
- CSU General Conditions for JOC
- Supplementary Prequalification Form
- Sample Forms





Technical Specifications



- JOC General & Specialty Technical Specifications
- Specifies Quality of Materials and Workmanship
- Corresponds with Tasks in the Construction Task Catalog®
- Order or Precedence
 - Campus Specifications
 - AE Specifications
 - JOC Specifications





Construction Task Catalog®



- Catalog of Pre-Priced Construction Tasks
- Organized by Construction Specifications Institute (CSI)
- Based on Local Labor, Material & Equipment Costs (within a 25-mile radius of campus)
- The tasks represent the "Scope of Work" for the contract
- Most current Prevailing Wage rate applied
- Priced at direct cost of construction only





General Conditions



- Bidding
- Award and Execution of Contract
- Conduct of Work
- Scope and Procedure for Job Order Work
- Interpretation of and Adherence to Contract Requirements
- Changes in the Work
- Claims and Damages
- Payment and Completion





General Conditions – REVISED 2023



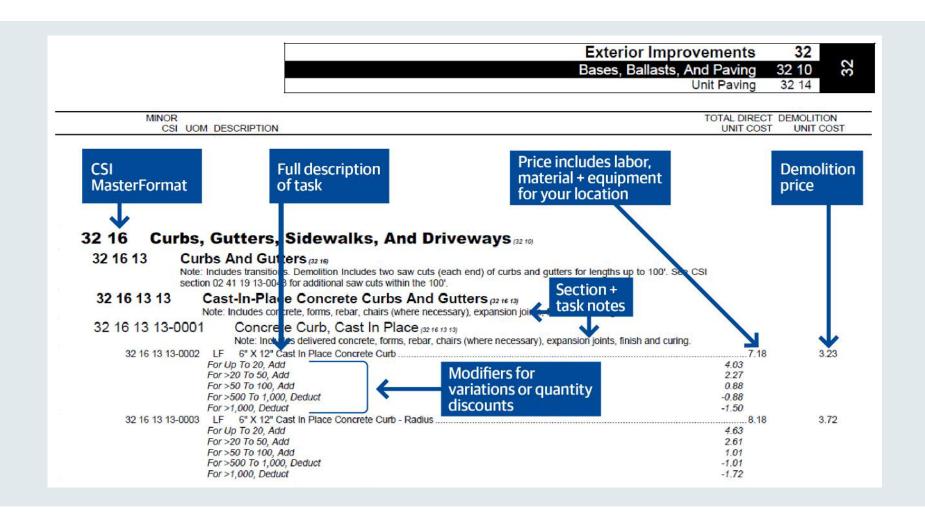
All contractors must meet all the requirements listed in the General Conditions. The CSU has made changes to the General Conditions, and they should all be reviewed prior to submitting bids. Here are some highlights.

- 02.11 I The Contractor shall comply with rules, regulations, ordinances, and statutes that apply to the California Disabled Veteran Business Enterprise Program as defined in Section 999 of the Military and Veterans Code03.02 The Contractor Agreement Notice to Proceed starts when the first Job Order is issued or (6) Months after Master Agreement was executed, whichever comes first.
- 02.11 I In accordance with section 999.5 of the Military and Veterans Code, a person or entity that knowingly provides false information shall be subject to a civil penalty for each violation in the minimum amount of two thousand five hundred dollars (\$2,500) and the maximum amount of twenty-five thousand dollars (\$25,000)
- 2.11 IV In accordance with section 999.5 of the Military and Veterans Code, upon completion of an awarded contract, the Contractor shall certify to the Trustees all the following in a final DVBE participation summary...



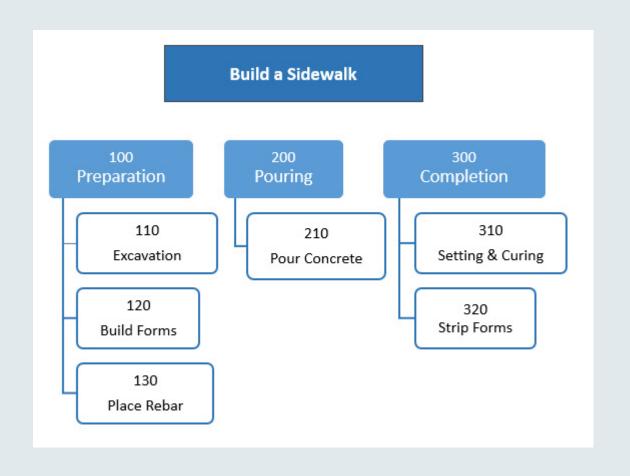
Construction Task Catalog®













- Is a CONTRACT DOCUMENT
- Contractor must review and understand "Using the Construction Task Catalog®"
- Rules of the game
- Make sure you get paid for all **appropriate** tasks
- Pages 00 1 to 00-6 of the CTC





About the CTC:

- ☑ This Construction Task Catalog® (CTC) was developed and customized by The Gordian Group, Inc. specifically for California State University Regional JOC Contract, priced locally using published in November 2016.
- ☑ 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 California State University Regional JOC Contract. 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 Construction Task Catalog are organized using CSI's MasterFormat.



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The Unit Prices Include:

LABOR COSTS:

- ☑ Labor costs include direct labor through the working foreperson level at straight-time prevailing wage rates including fringe benefits and an allowance for Social Security, Medicare taxes, worker's compensation, unemployment insurance, and employee benefits.
- Labor costs include unloading equipment, materials. and tools, and transporting the same up or down 2 1/2 stories and 125' to reach the project site: layout: measuring and cutting to fit; performing the task;

Using The Construction Task Catalog®

disposal of excess material; and time for lunch and

EQUIPMENT COSTS:

- Equipment costs include all equipment required to accomplish the task.
- large equipment (e.g. cranes, bulldozers, excavators, backhoes, bobcats etc.), which exclude
- ☑ 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.

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General Rules:

- Unit Prices are for Complete and In-Place Construction
- Unit Prices Include Labor, Material and Equipment. Do Not Add Labor to Repointing Task
- Unit Prices Include the Cost of Delivery to Project Site, Unloading, Storage and Handling Delivery Height is up to 2 ½ Stories
- Unit Prices Include Testing, Calibration, Balancing, Etc.
- 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





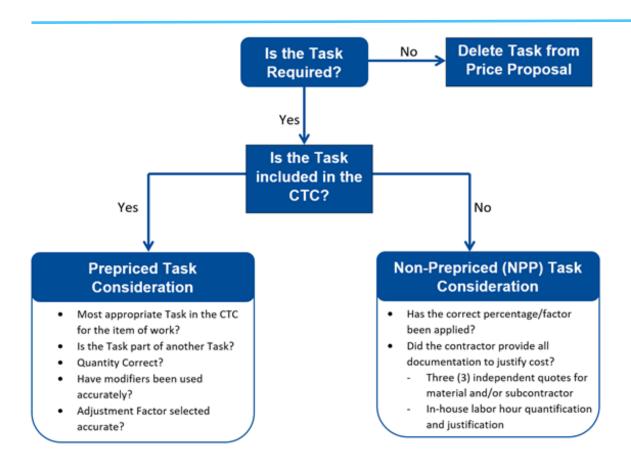
Contractors **Do Not** Get Paid Separately For:

- Moving and Returning Furniture Occupying Less than 55% of Floor Area. For Example,
 Moving Classroom Furniture to Paint.
- Labor for Protecting Work in Place. For Example, a Laborer to Stay After a Concrete Pour.
- Minor Barricades and Signage.
- Portable Toilet, Field Office, Field Office Equipment for Contractor's Use.
- Layout, Site Engineering for the Work Itself.



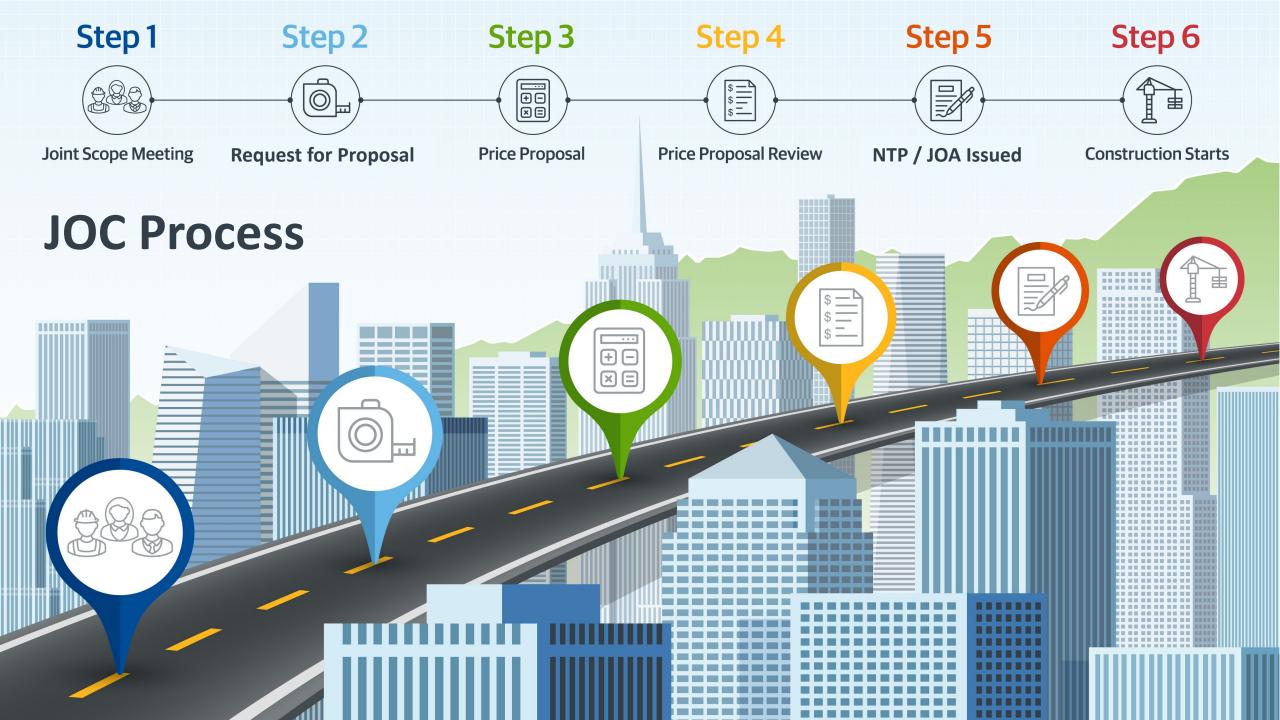
Non Pre-Priced Tasks





- Contractor must have permission from the University to use a Non Pre-Priced Task prior to submission
- Three (3) Quotes on vendors' or subcontractors' letterhead
- Justification for less than three (3)
 Quotes
- Contractors mark-up is a set NPP Factor. Normal working hours times 15% with a maximum factor of 1.1500.







Detailed Scope of Work

- This documents a thorough account of activities the contractor must perform to complete the job.
 - Collaborative document between owner and contractor
 - Defines the project's scale, location, and description
 - Details out items such as paint color, types of materials, strength of concrete required, etc.
- An agreed Scope of Work is very important! This is a prime opportunity for the contractor and campus to dissect the project into smaller details and produce an agreed scope of work to be used to build an accurate price proposal.





Total Job Order Price

Contractor Adjustment Factor

Importance of Adjustment Factors

- Determines Lowest Bidder AND
- Used to Price Individual Work Orders
- Price Proposal Total Becomes the <u>Lump Sum Job Order Amount</u>

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Unit Price x Quantity x Adjustment Factor = Total for Task

Unit Price x Quantity x Adjustment Factor = Total for Task

Unit Price x Quantity x Adjustment Factor = Total for Task
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Adjustment Factors

- 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

Please review Understanding the Construction Cost Catalog® for comprehensive listing



Cost Escalation



- Per the General Conditions, the <u>contractor is responsible for changes</u> in material and labor costs throughout the term of the contract.
- The contractor is required to **plan for escalation** at the time of the bid.
- Contractor cannot come back for additional compensation to cover escalation.



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



Method to Calculate Factors



- 1. Use Historical Project Data
- 2. Select a Completed Project You Know Scope and Direct Costs
- 3. Price Project From CTC
- 4. Add on Overhead and Profit
- 5. Calculate the Adjustment Factor



Proposal Building Example Project

Select multiple projects that you are familiar with based on your trade

- Doors and Hardware
- Interior Lighting
- Plumbing Fixtures
- Replace Boiler
- Include any exclusions
- Normal Working Hours Apply



Sample Price Costs: CTC vs. Historical Cost



Direct Cost of Work from CTC

 Replace Boiler 	\$ 33,055.73
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• 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 Based on Your Trade

Replace Doller 7 34,300.0	•	Replace Boiler	\$ 34,500.00
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• Doors/Hardware \$ 7,250.00

• Lighting \$ 12,750.00

• Plumbing \$ 10,500.00

TOTAL = \$65,000.00



Sample Project – Bid Forms



Line 1.	Normal Working Hours	1) 1.1280
Line 2.	Multiply Line 1 by 80%	2) 0.9024
Line 3.	Other Than Normal Working Hours	3) 1.1800
Line 4.	Multiply Line 3 by 15%	4) 0.1770
Line 5.	Premium Working Hours	5) 1.2200
Line 6.	Multiply Line 5 by 5%	6) 0.0610
Line 7.	Add Lines 2 and 4 and 6 (This is the Award Criteria Figure)	ACF = 1.1404



Sample Price: Putting it all together



СТС	\$64,000.00	\$64,000.00
Adjustment Factor	1.2289	0.9040
Project Value OH/P	78,650.95	57,856.00
Sub Cost	(65,000.00)	(65,000.00)

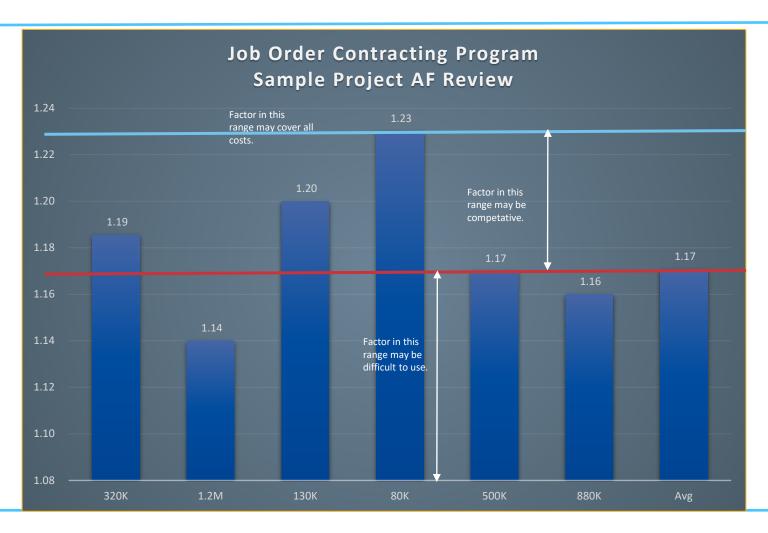
*Sample Only. Contractor to determine adjustment factor.

Added in Labor, and exaggerated quantities in line tasks will NOT BE ACCEPTED!



Sample Price: Putting it all together







Filling Out the Bid Form (Sample Only)



Schedule of Prices

The undersigned agrees to perform all work required, necessary, proper for, or incidental to completing the work called for in each individual job order issued under this Job Order Contract using the Construction Task Catalog and Technical Specifications incorporated herein with the following adjustment factors. Please enter up to 4 decimal places. (Ex: 1.2000, 1.1234)

Normal Working Hours

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

Other Than Normal Working Hours

(NOTE – NO FACTOR MAY BE LESS THAN THE NORMAL WORKING HOURS ADJUSTMENT FACTOR) Undersigned shall perform any or all functions called for during other than normal working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by this adjustment factor.

Premium Working Hours

(NOTE – NO FACTOR MAY BE LESS THAN THE NORMAL WORKING HOURS ADJUSTMENT FACTOR)
Undersigned shall perform any or all functions called for during premium working hours in the quantities specified in individual job orders against this contract for the unit price sum specified in the Construction Task Catalog multiplied by this adjustment factor.

Enter working factors below. Multiply by respective percentages. Add three (3) Weight Factors to get Sum. Then divide Sum by three (3) for Total Weighted Composite Score.

Adjustment Factors	Multiply By	Weight Factor
Normal	80%	
Other than Normal	15%	
Premium	5%	

Sum

Total Weighted Composite Score (Sum / 3):



Public Works Registration Package Requirements



Complete and submit the following as your Bid:

- 1. Bid Proposal Form
- 2. Bidders Bond / Security
- 3. Certification
- 4. Certificate of Appropriate License, DIR, PW Registration, and CA Company
- 5. Small Business Preference & Certification Request (if applicable)
- 6. Affidavit of Joint Venture (if applicable)
- 7. Non-Collusion Declaration Affidavit
- 8. Bid Proposal Form Signature Page



JOC Benefits

- Simplifies the procurement process
- Responsive Services
- Improves the quality of work
- Increases local subcontractor participation
- Volume is driven by performance
- Develop partnership with University
- Reduced Risk & increases transparency
- A Fixed Priced, Fast Track Procurement Process
 - Eliminates pricing negotiations
- No Shelf Life for Prices or Job Orders
- The JOC process allows for a higher percentage of projects to be delivered on time and within budget





Don't Forget!



- Lowest composite score from a Responsive, Responsible Bidder is Determined to be the Lowest bidder
- Your factor must be inclusive of the following:
 - Preparing Incidental Drawings or Sketches for Some Projects
 - Justifying Quantity Calculations
 - Explaining Detail of Work
 - Preparing Proposals for Some Projects That Might be Canceled
 - Price Margins on CTC Tasks will Vary
 - BUT Some Projects are More Profitable than Others
 - Maintaining a Fully Functioning Local Office
 - Supplying FULLTIME onsite supervision
 - Holding Required Licenses, Bonding and DIR Registry
 - All labor to be paid at prevailing wage



Solicitation Details



Southern Campuses

CSU Bakersfield

CSU Office of the Chancellor

CSU Channel Islands

CSU Dominguez Hills

CSU Fullerton

CSU Long Beach

CSU Los Angeles

CSU Northridge

Cal Poly Pomona

CSU San Bernardino

CSU San Marcos

San Diego State University

Northern Campuses

CSU Chico

CSU East Bay

CSU Fresno

California Maritime Academy

CSU Monterey Bay

CSU Sacramento

San Francisco State University

San José State University

Cal Poly San Luis Obispo

Sonoma State University

CSU Stanislaus



Solicitation Details-Prequalification



- All Prospective Bidders must be financially prequalified with the Trustees
 - For the Systemwide Financial Prequalification go to: http://www.calstate.edu/contractor-prequalification
 - o In addition to the Financial Prequalification, contractors must submit and satisfy a Supplementary Prequalification (past performance) form.
 - The Supplemental Prequalification will be provided in the sample bid package.
 - Contractor must hold same company name a valid contractor's B and C-39 License issued by the California CSLB for three (3) years.
 - Bidders must demonstrate 3 concurrent projects over the last 3 years with a minimum value of \$100,000
 - All project listed must have a minimum value of \$100,000
 - All projects must have been completed in the last 3 years
 - All projects listed must have been at least 51% self-performed
 - Submit the completed Supplementary form directly to cocm.prequal@calstate.edu
- Both the on-line Financial Prequalification application and Supplemental Prequalification form are to be submitted no later than 03/22/23.
- Official Bid Forms Will Be unlocked electronically to Prequalified Bidders only.
- Failure to provide this information will result in disqualification.





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
- DVBE Bid Advantage (Review requirements in the General Conditions)
- Bid Security: \$25,000



Solicitation Details



- DVBE Participation
 - 3% DVBE Participation Required (State Law)
 - Good Faith Effort Will Not Be Accepted
 - For more information contact Renee Sotelo
 - <u>rsotelo@calstate.edu</u>
 - (562) 951-4937
- SBE / DVBE Incentives
 - 5% SBE Preference
 - General certifies that they are an SBE
 - General (Non-SBE) commits to using 25% SBE Subs
 - DVBE Incentives*
 - 4-6% or more yields an incentive rate of 1-3%

^{*} Failure to meet minimum DVBE obligation may result in penalties (see General Conditions for additional information)



CSU DVBE Requirement



DVBE Participation	Incentive
3.00% to 3.99%	None
4.00% to 4.99%	1%
5.00% to 5.99%	2%
6.00% or more	3%

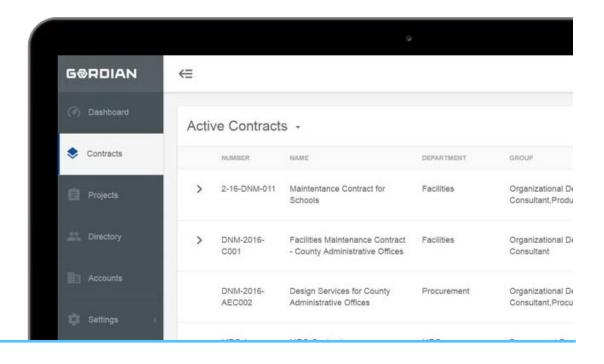


Solicitation Details



Internet Based Software Provided with Contract

- Software Training Expedites the Job Order Process in Gordian Cloud
 - Price Proposal building and review
 - Ongoing training as needed for new hires
 - Troubleshooting
 - Subcontractor tracking





Bid Schedule Of Events Regional General Construction



 Bid Documents Av

- Advertised to Planet Bids
- Prequalification forms (general & supplementary) due
- Affidavit of Joint Venture Form due
- Last day to ask RFI Questions
- Issue Addenda (if any)
- Bids Due before 2:00 pm
- Original Bid proposal Signature page / Bid Security due
- Posting of Bid Abstract on PlanetBids
- Notice of Intent to Award
- Contract Commencement*

February 27	7, 2023
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February 27, 2023

March 22, 2023 April 12, 2023

-March 22, 2023 April 19, 2023

-March 10,2023 April 12, 2023

March 15, 2023 April 17, 2023

April 5, 2023 April 26, 2023

April 6, 2023 April 27, 2023

April 7, 2023 April 27, 2023

April 14, 2023

May 5, 2023

April 28, 2023*

May 19, 2023

Note: eBid proposals not received by the date and time specified will be rejected. Bidders should allow enough time to upload their bid documents online. Bidders will automatically be locked out of PlanetBids at closing time.

^{*} Per Revised General Conditions 03.02 – The Contractor Notice Proceed starts when the first Job Order is issued or (6) Months after Master Agreement was executed.





Solicitation Details



- JOC has a Fixed One Year Term
- No Guaranteed Minimum Value
- Each JOC has a Maximum Contract Value \$3,000,000
- No Single Job Order can be Awarded for more than \$929,000
- Contractor must have an office with appropriate business license, within 50 miles of one of the campuses in the region that they are bidding. Refer to CSU campus map https://www.calstate.edu/attend/campuses
- 2 contracts awarded for Regional Roofing South
- 2 contracts awarded for **Regional Roofing** North



Solicitation Details Regional Specialty Paving Contracts



Competitive Bid

- Must Bid Three Adjustment Factors
 - Daytime Working Hours 7am to 5:30pm Monday through Saturday
 - **Nighttime Working Hours** 5:31pm to 6:59am Monday through Saturday
 - Premium Hours 12am to 11:59pm Sunday, legal holidays, and
 Overtime (Note Special Conditions)
- Same Adjustment Factors Apply to All Tasks in the CTC
- Must Include all Indirect Costs & Profit



Regional Specialty Paving Contract Bids



Bid Due date (bid documents are uploaded to PlanetBids.com)

- Wednesday April 5, 2023 before 2:00 pm April 26, 2023
- Bidders will be locked out of PlanetBids at 2:00 pm

Bid Results will be posted on PlanetBids within 48-72 hours after bids are received

- Original documents (Bidders Bond & Signature Page) must arrive to CSU before 4:00 pm on April 6, 2023 April 27, 2023
- Most responsive and responsible Bidders in both regions will be determined



Questions & Confirmation



All questions concerning these solicitations must be received via email no later than:

Regional Roofing Contracts – Friday, March 10, 2023 Wednesday April 12, 2023

Confirm that your firm has reviewed the Pre-Bid Presentation and **email** <u>cocm.prequal@calstate.edu</u>

Jeremy Gomoljak, Construction Manager

CSU Office of the Chancellor

CPDC – Construction Management

401 Golden Shore, Long Beach, CA 90802

Telephone: 562-951-4163 Email: cocm@calstate.edu

All Questions Must Be in the form of an RFI (Request For Information)



