

# Orange County Public Works

FY 2025-2026

Job Order Contract

HVAC, Roofing, Electrical, Demolition, Slurry and Paving

Mandatory Pre-Bid

January 7, 2025

10:00 a.m.



# Pre-Bid Conference Agenda

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- JOC Overview
- JOC Contract Documents
- JOC Process
- Solicitation Details
- Using the Construction Task Catalog® (CTC)
- Calculating the Bid
- Bid Considerations & Review
- Contractor Adjustment Factors
- Risk of Low Adjustment Factors
- Questions

# Job Order Contracting



## Definition

- Indefinite delivery/indefinite quantity process (IDIQ)
- Contract is awarded before individual projects are identified
- Enables contractor 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

# 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

# Why JOC Works For Contractors

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- 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
  - Job Orders are assigned to the contractor without a competition
  - Consistent process for project proposals
- Reduced Risk
  - Fixed prices
  - Payment for every element of work performed
  - Ability to provide input during scope development
  - Eliminates quibbling over change orders
- Build a partnership with Orange County
- Ability to leverage Subcontractor and Supplier relationships
- Ability to sell value, not just compete to be the lowest price

# Why JOC Works For OCPW Facilities

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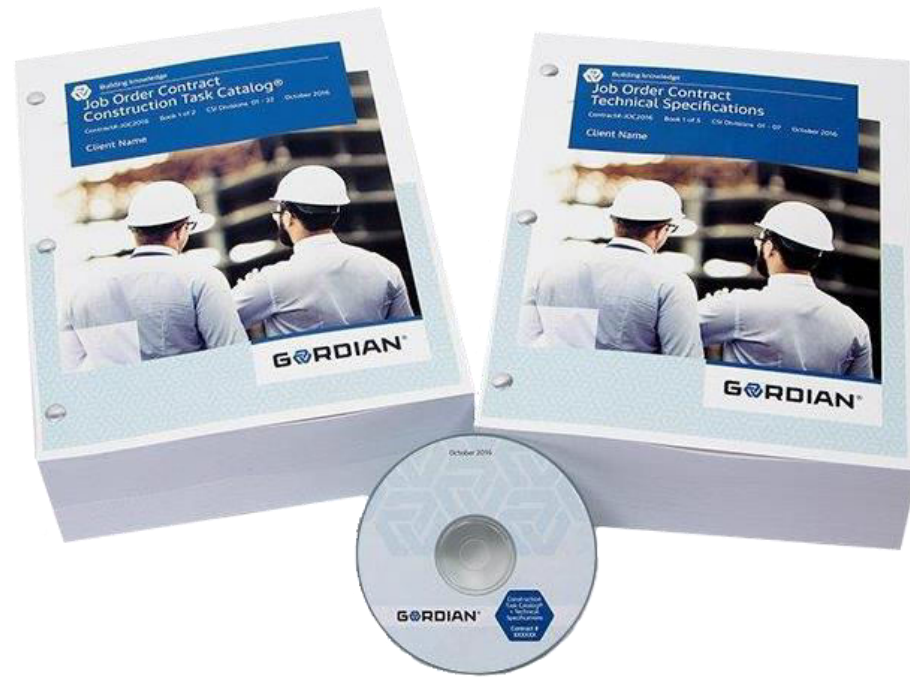


- A Fixed Priced, Fast Track Procurement Process
- Job Orders are Lump Sum
- Can accomplish many individual projects with a single Competitively Bid Contract
- Contractor Has a Continuing Financial Incentive To Provide
  - Responsive Services
  - Accurate Proposals
  - Quality Work on Time
  - Timely Close Out
- Future Purchase Orders Tied to Contractor Performance
  - No Obligation To Award Specific Projects
  - Orange County has other Construction Procurement Options

# The Process



# Contract Documents



- Front End Documents
- Construction Task Catalog® (CTC)
- Technical Specifications




# Front End Documents



- Special Provision for JOC FY 2025
- Notice Inviting Bids
- Bid Documents
- Non-Collusion Affidavit
- Iran Contracting Act
- Payment and Performance Bonds
- Bid Bond
- Balance of the Special Provision

County of Orange, OC Public Works  
Job Order Contract (JOC) for Roofing Services

IFB # 080-2762301-JM



**OC PUBLIC WORKS**  
Procurement Services  
601 N. Ross St., 4<sup>th</sup> Floor  
Santa Ana, CA 92701  
Date: January 3, 2025

**INVITATION FOR BIDS**  
BID MUST BE RECEIVED BEFORE:  
**January 3, 2025 / 2:00 PM PDT**  
DATE / TIME  
**IFB 080-2762301-JM**  
BID NUMBER  
**2762301**  
FILE FOLDER NUMBER  
**COVER PAGE**

Procurement Services  
Regular Office Hours:  
8:00 AM. to 5:00 PM  
Monday through Friday  
The office is closed between  
12:00 PM and 1:00 PM

The County of Orange, OC Public Works, ("County") is requesting competitive sealed bids from qualified firms ("Bidder") for Job Order Contracting ("JOC") for Roofing Services. The awarded contract ("Contract") will be a usage Contract between the County and awarded Bidder ("Contractor") in accordance with the Model Contract, attached hereto and incorporated herein, and Scope of Work attached hereto and incorporated herein by this reference as Attachment A. The proposed Contract shall be effective for one (1) year, or until the total Contract amount is reached. The Contractor shall possess a current State of California C-39 Contractor's license issued by the California State Contractor's License Board.

**BIDS ARE DUE ON OR BEFORE THE DATE AND TIME SPECIFIED.**

Schedule of Activities	Time	Date
RSVP for Pre-Submittal Meeting	5:00 pm	January 6, 2025
Mandatory Pre-Bid Meeting	10:00 am	January 7, 2025
Question & Answer Period Ends	2:00 pm	January 13, 2025
Electronic Bid Opening	2:00 pm	January 17, 2025

**BIDS WILL BE VALID FOR 180 DAYS AFTER CLOSING DATE.**

All questions and inquiries related to this IFB must be directed to: Jennifer Mason, County Deputy Purchasing Agent ("DPA"), OC Public Works/Procurement Services, via the OpenGov at the [County's online bidding system](#) under the bid page for this solicitation.

Respondents must not contact other County personnel for questions or clarifications about this IFB. All official communications will come from OC Public Works/Procurement Services. Any response from other County sources is unauthorized and invalid.

I have read and understand and agree to the terms and conditions herewith, and I am submitting a bid in response to this solicitation.

Date: \_\_\_\_\_ Company Name: \_\_\_\_\_

*Authorized Signature	Print Name	Title
*Authorized Signature	Print Name	Title

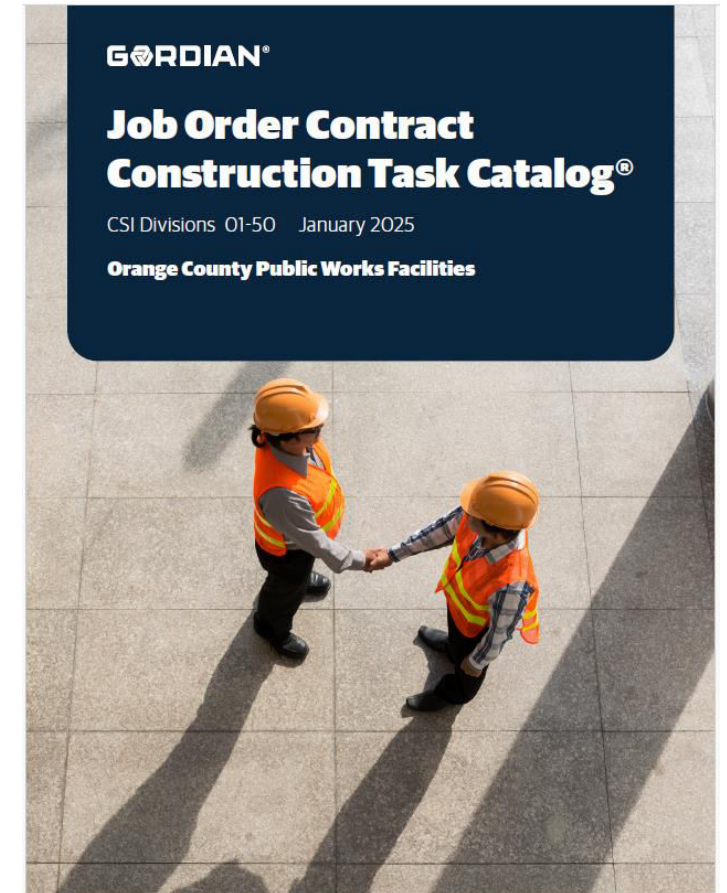
**RETURN THIS COVER PAGE WITH YOUR BID**

2762301 Page 1 of 75

# 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



# Using the Construction Task Catalog®



- Contractor must review and understand “Using the Construction Task Catalog®”
- Defines What the Unit Prices Include
- Defines what The Adjustment Factor Includes
- Pages 00-1 to 00-6 of the CTC

**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 Orange County Public Works, priced locally using current labor, material and equipment costs, and published in January 2025.
- ☑ 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 Orange County Public Works. 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**  
MasterFormat® is produced jointly by CSI and Construction Specifications Canada (CSC). U.S. copyright is held by CSI and Canadian copyright is held by CSC. All Rights Reserved. For license information, contact CSI at [info@csi.com](mailto:info@csi.com) or [www.csi.com](http://www.csi.com). For more information on MasterFormat visit [www.masterformat.com](http://www.masterformat.com)

**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.

**EQUIPMENT COSTS:**

- ☑ Equipment costs include all equipment required to accomplish the Task.
- ☑ Mobilization is included for all equipment except large equipment (e.g. cranes, bulldozers, excavators, backhoes, bobcats etc.), which exclude mobilization.
- ☑ Equipment costs include all operating expenses such as fuel, electricity, lubricants, etc.

**MATERIAL COSTS:**

- ☑ Material costs include the cost of the material, delivery, and all incidentals and accessories integral to the installation.
- ☑ Material costs include manufacturer's and/or fabricator's shop drawings.
- ☑ Material costs for roofing, drywall, VCT, carpet, wall covering, ceiling tile, pipe, conduit, concrete, etc. include an allowance for waste. This list is not intended to be all inclusive, but descriptive of the types of construction materials that are typically sold in standard lengths, sizes and weights.
- ☑ Material costs for imported materials (e.g. aggregate, sand, soil, etc.) include delivery up to 15 miles from the closest approved source.

**The Adjustment Factors Include:**

The Adjustment Factors include the following costs, unless specifically excluded by the terms of the Contract Documents:

**BUSINESS COSTS:**

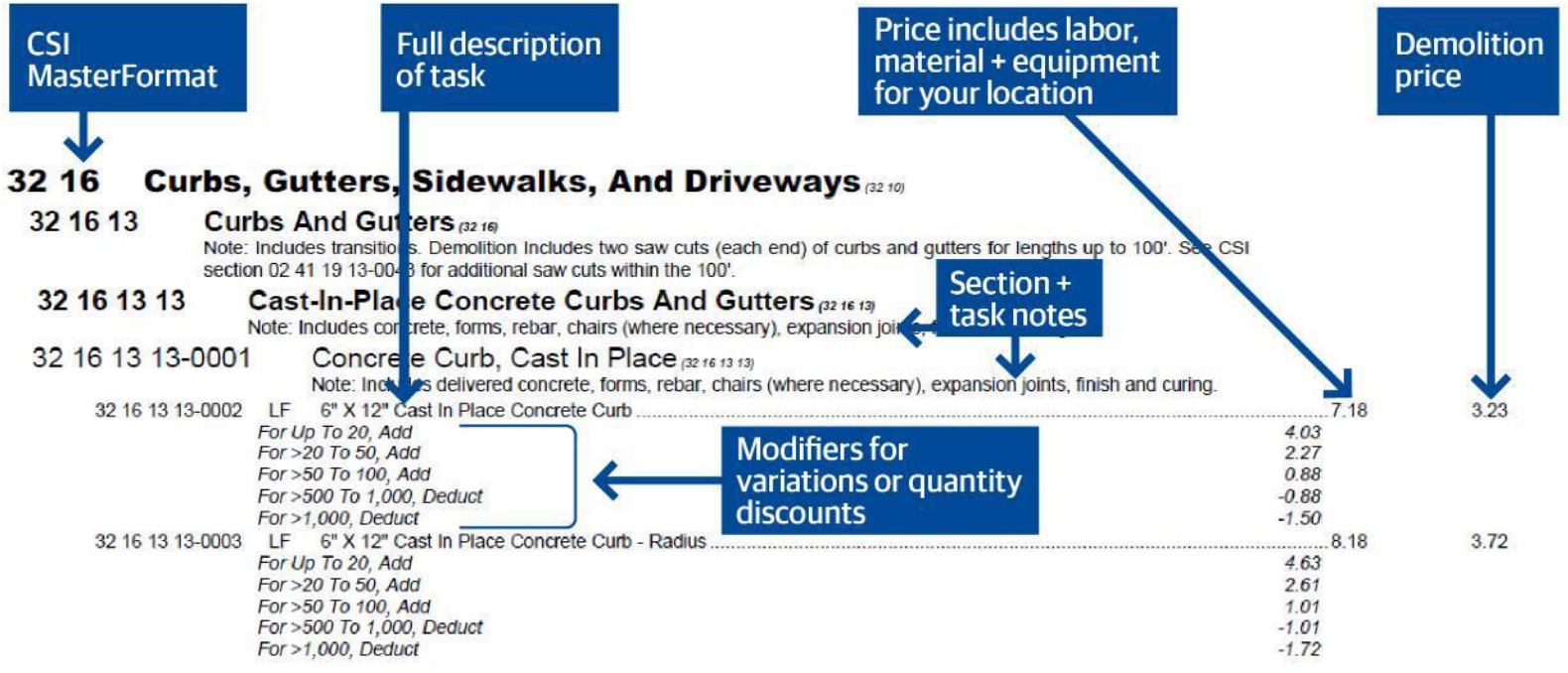
- ☑ Office overhead, including, but not limited to, office space, office equipment, office and management personnel, office supplies, and employee transportation.

2025  
Orange County Public Works Facilities

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

MINOR CSI UOM DESCRIPTION	TOTAL DIRECT UNIT COST	DEMOLITION UNIT COST
<b>32 16 Curbs, Gutters, Sidewalks, And Driveways</b> <small>(32 10)</small>		
<b>32 16 13 Curbs And Gutters</b> <small>(32 16)</small>		
<small>Note: Includes transitions. Demolition Includes two saw cuts (each end) of curbs and gutters for lengths up to 100'. See CSI section 02 41 19 13-00-3 for additional saw cuts within the 100'.</small>		
<b>32 16 13 13 Cast-In-Place Concrete Curbs And Gutters</b> <small>(32 16 13)</small>		
<small>Note: Includes concrete, forms, rebar, chairs (where necessary), expansion joints, finish and curing.</small>		
<b>32 16 13 13-0001 Concrete Curb, Cast In Place</b> <small>(32 16 13 13)</small>		
<small>Note: Includes delivered concrete, forms, rebar, chairs (where necessary), expansion joints, finish and curing.</small>		
32 16 13 13-0002 LF 6" X 12" Cast In Place Concrete Curb .....	7.18	3.23
<i>For Up To 20, Add</i>	4.03	
<i>For &gt;20 To 50, Add</i>	2.27	
<i>For &gt;50 To 100, Add</i>	0.88	
<i>For &gt;500 To 1,000, Deduct</i>	-0.88	
<i>For &gt;1,000, Deduct</i>	-1.50	
32 16 13 13-0003 LF 6" X 12" Cast In Place Concrete Curb - Radius .....	8.18	3.72
<i>For Up To 20, Add</i>	4.63	
<i>For &gt;20 To 50, Add</i>	2.61	
<i>For &gt;50 To 100, Add</i>	1.01	
<i>For &gt;500 To 1,000, Deduct</i>	-1.01	
<i>For &gt;1,000, Deduct</i>	-1.72	





# Non Pre-Priced Tasks

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- An item required for the scope, but in not in the CTC
- Majority will use CTC item for labor and equipment, NPP quote for material cost
- Contractor must have permission from the County to use a Non Pre-priced Task prior to use in Proposal
- Three (3) quotes on letterhead, for vendor-supplied material or specialized subcontractor
- Justification for less than three (3) quotes
- Contractor is paid the amount in the following formula:

## Contractor performed duties:

**A= The hourly rate for each trade classification not included in the CTC, multiplied by quantity;**

**B= The rate for each piece of Equipment not in the CTC multiplied by quantity;**

**C= Lowest of three (3) independent material quotes.**

**Total for a Non Pre-Priced Task performed with Contractor's Own Forces = (A+B+C) x Factor of 1.05**

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# Non Pre-Priced Tasks

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## Subcontractor Performed Tasks

The Contractor must submit three (3) independent quotes for the Work.

D= Lowest of three (3) Subcontractor quotes.

Total cost of Non Pre-Priced Tasks performed by Subcontractors = D x Factor of 1.05

After being used on three separate Job Orders, the unit price for the Non Pre-Priced Task may become fixed as a permanent Pre-Priced item, which will no longer require price justification. The County's determination as to whether a task is a Pre-Priced Task or a Non Pre-Priced Task shall be final, binding and conclusive.

# Technical Specifications



- Specifies Quality of Materials and Workmanship
- Corresponds with Tasks in the CTC



# Bidding Process



- **Award is Based on Competitive Bid**

- **Contractor Bids Two Adjustment Factors:**

1. Normal Working Hours, 7:00 am to 5:00 pm Monday through Friday, inclusive (80% Weighting)
2. Other Than Normal Working Hours, 5:01 pm to 6:59 am Monday through Friday, and any time Saturday, Sunday and County Holidays (20% Weighting)

- **For Bidding Purposes, each Factor is Weighted:**

- Each Adjustment Factor is Weighted. The sum of the Weighted Factors is the **Award Criteria Figure**
- The Lowest Award Criteria Figure from a Responsive, Responsible Bidder is the Low Bidder

- **Prior to Bidding, Orange County Cannot:**

- Identify or Commit to Specific Projects or Locations
- Identify or Commit to Specific CTC Tasks or Quantities



# Solicitation Details



Contract	License Requirement	Minimum Contract Value	Maximum Contract Value Per Individual Term	Maximum Total Contract Term	Bid Bond	Payment & Performance Bonds (Each)
HVAC IFB # 080-2762604-JM	Class C-20	\$0	\$4,000,000	1 Year	10% of Maximum Contract Value	\$3,000,000
Roofing IFB # 080-2762301-JM	Class C-39	\$0	\$3,000,000	1 Year	10% of Maximum Contract Value	\$2,000,000
Electrical IFB # 080-2764701-TV	Class C-10	\$0	\$3,000,000	1 Year	10% of Maximum Contract Value	\$3,000,000
Demolition IFB # 080-2762602-DR	Class C-21	\$0	\$2,000,000	1 Year	10% of Maximum Contract Value	\$1,000,000
Slurry & Paving IFB # 080-2762605-SV	Class C-12	\$0	\$3,000,000	1 Year	10% of Maximum Contract Value	\$1,000,000

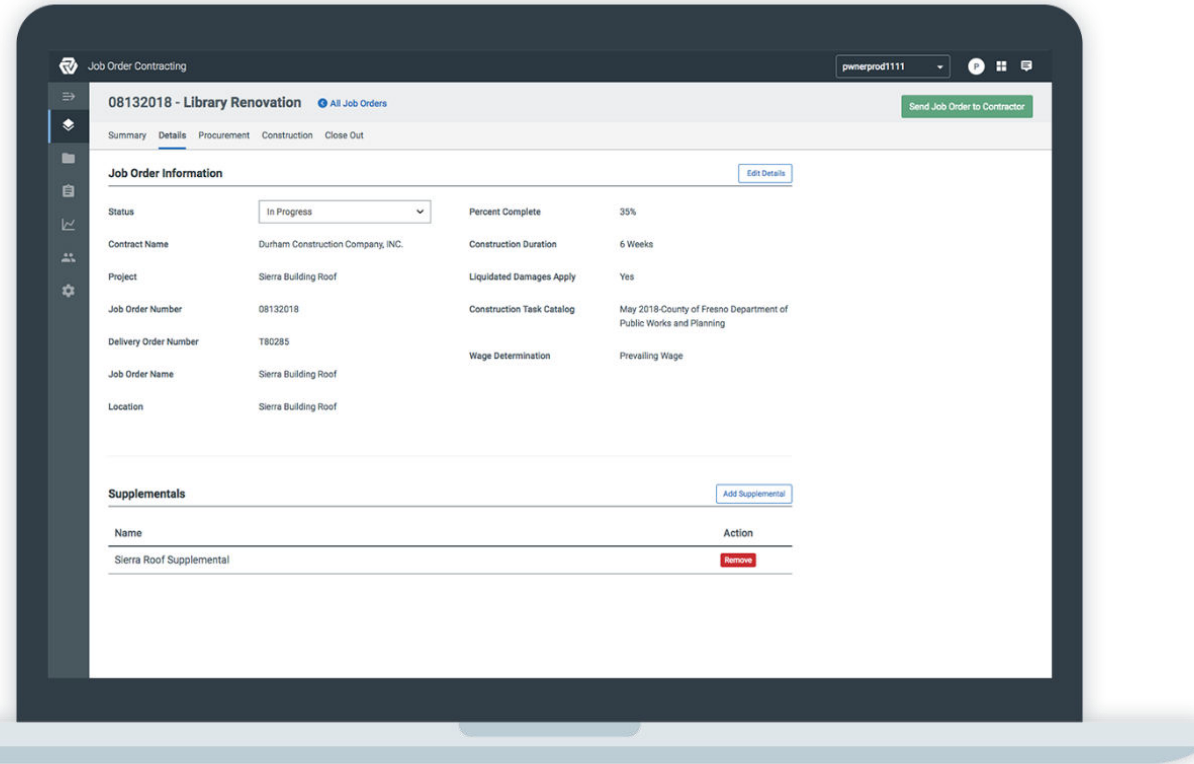
# Solicitation Details

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- Changes to Scope, or Differing Site Conditions trigger a Supplemental Job Order
  - The same process as Original Job Orders
  - Priced from Construction Task Catalog<sup>®</sup>
  - There are 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: 10% of the Maximum Contract Value

# Solicitation Details



## Internet Based Gordian<sup>®</sup> Software Provided with Contract

- Supports collaborative scope development and refinement
- Instant access to OCPW's customized CTC
- Expedites the Job Order Process
  - Price Proposals
  - Subcontractor Lists
  - Tracking Dates
  - Required Job Order Forms
- Ongoing technical support and training provided

# 1% Contractor License Fee



- Access to Gordian Cloud<sup>®</sup>, Construction Task Catalog<sup>®</sup>, 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
- Gordian software training
- Software support
- Included in the Contractor's Adjustment Factor
  - Consider with the Bid as an Overhead cost
  - 1% of Job Order Price, payable only after NTP Issuance

# Example - How to Calculate an Adjustment Factor

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- **Use Historical Project Data**
  - Select a Completed Project
    - You Know Scope and Direct Costs
  - Price Project From CTC
  - **Add on Overhead and Profit**
  - Calculate the Adjustment Factor

# Example Project: Detailed Scope of Work

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- 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 exist 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.



# Example: CTC vs. Actual



## CTC Price for Work

- 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 Subs or Self - Performed

- Replace Boiler \$ 34,500.00
- Doors/Hardware \$ 7,250.00
- Lighting \$ 12,750.00
- Plumbing \$ 10,500.00

TOTAL = \$ 65,000.00





# Example: Putting it All Together

• A.	Direct Cost of Work	\$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.	Total (Cost + O/H & Profit)	\$78,650.00
• F.	CTC Price	\$66,344.12
•	<b>Adjustment Factor (= E / F) = 1.1855</b>	

\*Example Only. **Contractor to determine O/H & Profit.**  
Prepare this calculation for more than one sample project.

# Calculating a Bid Factor/Coefficient Considerations

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## Best Practice

- Calculate the factor/coefficient to perform as well as win the bid
- Compare your costs to the costs in the unit price catalog
- Know your OHP requirements and calculate your adjustment factor accordingly
- Plan for cost escalation

## Avoid

- Calculating factor only to win the bid
- Bidding according to other contractors past winning bids
- Factors that don't allow for OHP

# Example: Filling Out the Bid Form



**FACTOR 1** - Unit work requirements to be performed during Normal Working Hours, 7:00 AM to 5:00 PM, Monday to Friday, inclusive, (Saturdays, Sundays, and County Holidays are excluded) as ordered by COUNTY in individual Task Orders against the contract.

1 . 2 0 3 4

Utilize four decimal places |

one point two zero three four

Bid for Normal Working Hours (in words)

**FACTOR 2** - Unit work requirements to be performed during Other Than Normal Working Hours, 5:01 PM to 6:59 AM, on Weekdays and any times during Saturdays, Sundays, and County Holidays as ordered by COUNTY in individual Task Orders against the contract. Factor 2 must be equal or greater than Factor 1.

1 . 2 2 3 4

Utilize four decimal places

one point two two three four

Bid for Other Than Normal Working Hours (in words)

# Example: Filling Out the Bid Form



## AWARD FORMULA

Line 1: Normal Working Hours-Adjustment Factor 1	<u>1 . 2 0 3 4</u>
Line 2: Multiply Line 1 by (80) %	<u>0 . 9 6 7 2</u>
Line 3: Other Than Normal Working Hours-Adjustment Factor 2	<u>1 . 2 2 3 4</u>
Line 4: Multiply Line 3 by (20) %	<u>0 . 2 4 4 7</u>
Line 5: Add Lines 2 and 4	<u>1 . 2 1 1 9</u>

The above Adjustment Factors are to be specified to four decimal places. Use conventional rounding methodology (i.e., if the number in the 5<sup>th</sup> decimal place is 0-4, the number in the 4<sup>th</sup> decimal remains unchanged; if the number in the 5<sup>th</sup> decimal place is 5-9, the number in the 4<sup>th</sup> decimal is rounded upward). Any alteration, erasure, or change must be clearly indicated and initialed by the bidder. All prices and information required on the bid form must be either typewritten or neatly printed in ink (use figures only).

\* Sample only

# Contractor Adjustment Factor



## Importance of Adjustment Factors

- Determines Lowest Bidder AND
- Used to Price Individual Task Orders
- Price Proposal Total Becomes the Lump Sum Task Order Amount

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

# Bid Considerations

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- Contractors Should Expect:
  - Prepare Incidental Drawings or Sketches for Some Jobs
    - Justify Quantity Calculations
    - Explain Detail of Work
  - Prepare Proposals for Some Jobs That Might be Canceled
  - Varying Margins on CTC Tasks
  - Some Projects are More Profitable than Others
  - Must Maintain a Fully Functioning Local Office
  - Must Supervise each Job Order – No Pass-Thru Job Orders
  - Hold Required Licenses
  - 1% of each Awarded Job Order is payable directly to Gordian, the Contractor License Fee for Gordian software access and support

# Possible Risks of Low Adjustment Factor

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- 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
  - May Shorten Contract
  - Lost Profitability
- No Second Chance to Improve your Margin, Original and Supplemental Task Orders are Priced the Same Way



# Review - Key Points

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- Focus on Total Potential Value of Contract
  - **Varies by Trade from \$2,000,000 to \$4,000,000**
- Evaluate Construction Task Catalog<sup>®</sup>
  - Analyze Unit Prices
  - Know “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



# Bids

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- Complete and Submit the Following with your Bid:
  1. Bid Cover Page: Dated and signed by Contractor's authorized representative (note special requirements for Corporations)
  2. Attachment B: Contractor's Pricing (2 pages, individual scores & award formula)
  3. Exhibit 1: Company Profile and References
  4. Exhibit 2: Non-Collusion Affidavit
  5. Bid Bond in an amount not less than 10%
  6. Exhibit 5 Iran Contracting Act Certification Form

# Attendance and Questions

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## **Make Sure You Confirm Your Attendance!**

- Attendance will be taken at the webinar meeting, in the beginning and the end of the meeting. Attendance during entire webinar is required.
- **All questions and inquiries for this Invitation for Bidders must be directed to the County Deputy Purchasing Agent (“DPA”), OC Public Works/Procurement Services, via OpenGov no later than 2:00 P.M on January 13, 2025**

# Bid Due Date



**Bids Due: Wednesday, January 17, 2025 at 2:00 PM, PDT**

This is a fully electronic Invitation for Bid (IFB). Bidders must submit their bid on the County's online bidding system to be considered responsive. All bid documents specified in Section II of the IFB shall be uploaded electronically and bidders shall utilize OpenGov to provide their overall factor. Only electronic bids will be accepted, no exceptions. Once the Bid Due Date and Time has lapsed, bidders, the public and County staff can immediately see the results on OpenGov.

**Late bids will not be accepted regardless of reason**