



# REGIONAL ROOFING JOB ORDER CONTRACT

CALIFORNIA STATE UNIVERSITY, OFFICE OF THE CHANCELLOR

**Pre-Bid Presentation** 

Contracts: RJOCN-RF007, RJOCS-RF007, RJOCH-RF001
April 17, 2024







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<sup>®</sup> (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



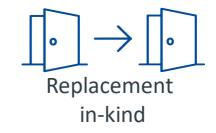


## **Types of Construction Projects**

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

















#### **Umbrella Contract**

# Part 1 Bidding the Umbrella Job Order Contract



# Part 2 Procuring Individual Projects From Owner









- Owner Project C
- Subcontracting Opportunities



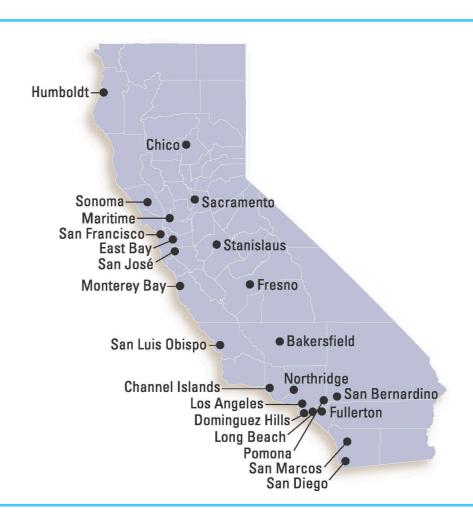




### **CSU Projects since 1999**

#### More than \$500MM completed in work:

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





#### **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
- Sample Agreement Forms





#### **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®**



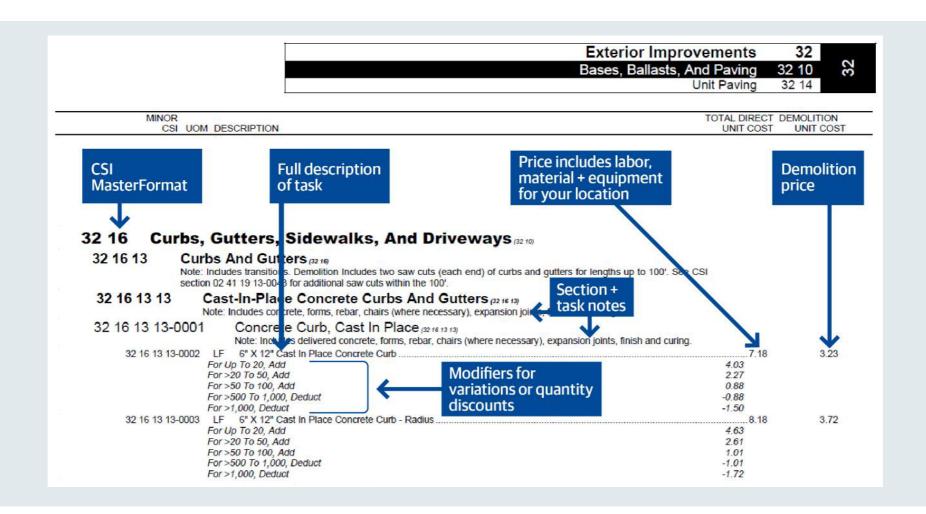
- Catalog of Pre-Priced Construction Tasks
- Organized by Construction Specifications Institute (CSI)
- Based on Local Labor, Material & Equipment Costs (within a 25-mile radius of campus)
- The tasks represent the "Scope of Work" for the contract
- Most current Prevailing Wage rate applied
- Priced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





#### **Construction Task Catalog®**







#### **Technical Specifications**



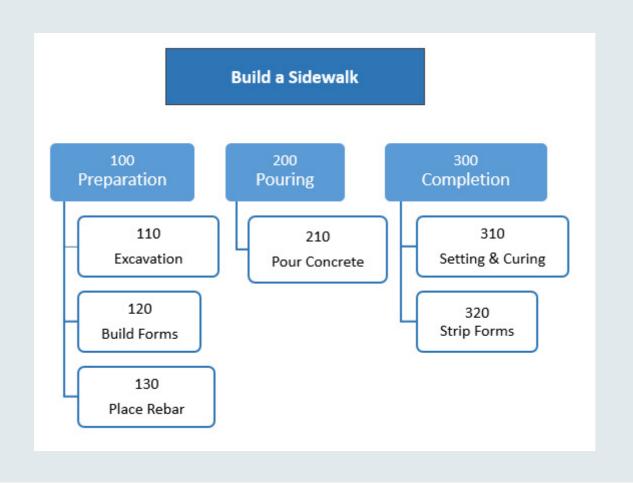
- JOC General & Specialty Technical Specifications
- Specifies Quality of Materials and Workmanship
- Corresponds with Tasks in the Construction Task Catalog®
- Order or Precedence
  - Campus Specifications
  - AE Specifications
  - JOC Specifications













- 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 current labor, material and equipment costs, and 

  Mobilization is included for all equipment except 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







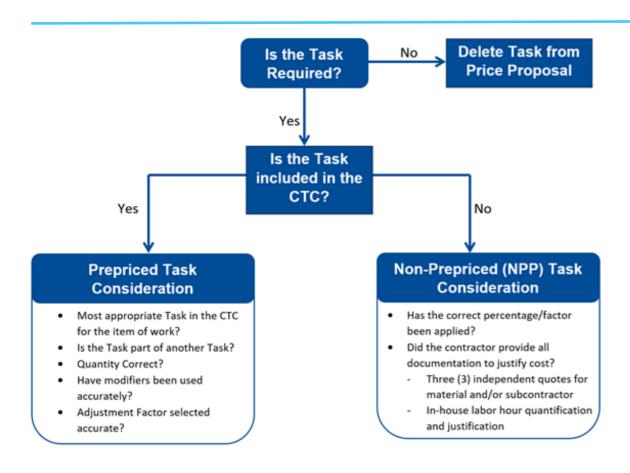
#### Contractors **Do Not** Get Paid Separately For:

- 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.





**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>

```
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
```





### **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**

| <ul> <li>Replace Boiler</li> </ul> | \$ 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 Based on Your Trade

| Neplace Dollel 3 34,300.0 |  | Replace Boiler | \$ 34,500.00 |
|---------------------------|--|----------------|--------------|
|---------------------------|--|----------------|--------------|

• 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.

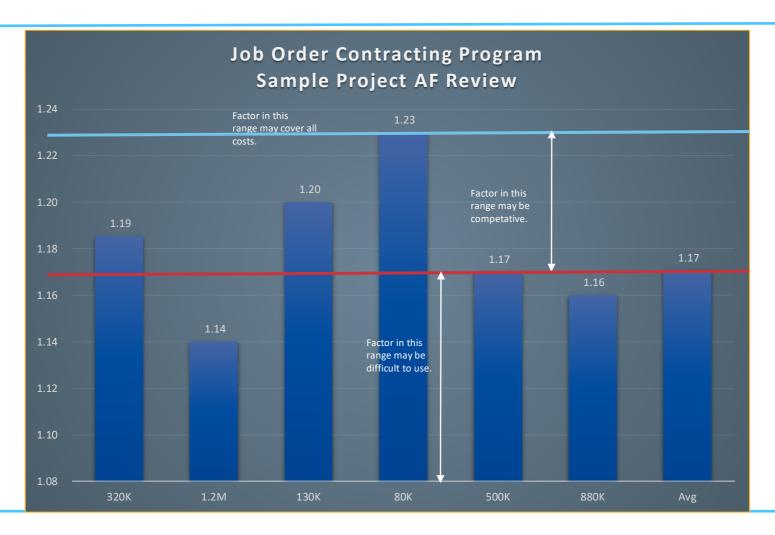
Added in Labor, and exaggerated quantities in line tasks will NOT BE ACCEPTED!





### 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





### **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







## **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.



## 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





#### **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** 

\*Cal Poly Humboldt



### Solicitation Details-Prequalification





- All Prospective Bidders must be financially prequalified with the Trustees
  - For the Systemwide Financial Prequalification go to: <a href="http://www.calstate.edu/contractor-prequalification">http://www.calstate.edu/contractor-prequalification</a>
  - In addition to the Financial Prequalification, contractors must submit and satisfy a Supplementary Prequalification (past performance) application via PlanetBids.
  - The Supplemental Prequalification will require:
    - 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 <a href="mailto:cocm.prequal@calstate.edu">cocm.prequal@calstate.edu</a>
- Both the on-line Financial Prequalification application and Supplemental Prequalification form are to be submitted no later than 05/22/2024.
- 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<sup>®</sup>
  - Supplemental Job Order
  - No Negotiated Change Orders
- Filings and Permits
  - Fees paid for all Permits reimbursed 100% No Markup
- Liquidated Damages
  - On a Job Order by Job Order basis
  - Sliding Scale Based on Job Order Value
- 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%

<sup>\*</sup> 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%        |

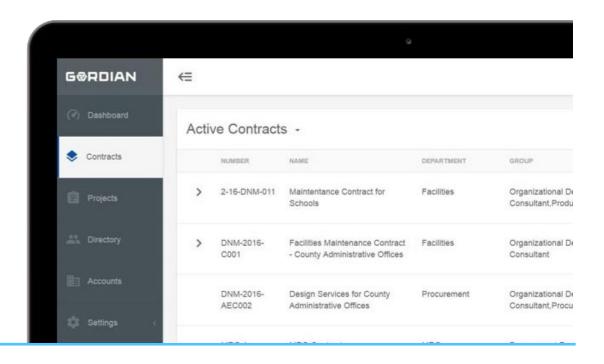


#### **Solicitation Details**



## 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 Available                                     | May 7, 2024    |
|---|---|----------------|
| • | Advertised to Planet Bids                                   | May 7, 2024    |
| • | Prequalification applications (general & supplementary) due | May 22, 2024   |
| • | Affidavit of Joint Venture Form due                         | May 29, 2024   |
| • | Last day to ask RFI Questions                               | May 14, 2024   |
| • | Issue Addenda (if any)                                      | May 31, 2024   |
| • | Bids Due before 2:00 pm                                     | June 5, 2024   |
| • | Original Bid proposal Signature page / Bid Security due     | June 6, 2024   |
| • | Posting of Bid Abstract on PlanetBids                       | June 7, 2024   |
| • | Notice of Intent to Award                                   | June 14, 2024  |
| • | Contract Commencement*                                      | June 28, 2024* |

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.

<sup>\*</sup> 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 \$1,103,000
- 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 <a href="https://www.calstate.edu/attend/campuses">https://www.calstate.edu/attend/campuses</a>
- 2 contracts awarded for **Regional Roofing** South
- 2 contracts awarded for Regional Roofing North
- 2 contracts awarded for Regional Roofing Cal Poly Humboldt



## **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 Roofing Contract Bids**



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

- Wednesday June 5, 2024 before 2:00 pm
- 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 June 6, 2024
- Most responsive and responsible Bidders in all regions will be determined



#### **Questions & Confirmation**



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

Regional Roofing Contracts – Friday, May 24, 2024

**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)



