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JOB ORDER CONTRACTING (JOC)

BEST PRACTICES GUIDELINES

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Executive Summary

This best practices guideline is intended to provide public owners and contractors information on overall methods and processes in procuring, awarding and managing a typical Job Order Contract (JOC) that have been successful for many Washington State public agencies.

Best Practices Guidelines:

The Job Order Contracting (JOC) Best Practices Guidelines focus on the JOC project delivery as regulated by Chapter 39.10 RCW, which is administered by the Capital Projects Advisory Review Board (CPARB) and applies to all public bodies in Washington State.

The CPARB has created a JOC Evaluation Committee. This committee is made up of key stakeholders within the public and private sector. The goal of the committee is to review data collected, look at best practices and make recommendations on JOC statute.

The guidelines have been developed by the Committee and are intended to fill the gap between Washington State's regulations and practices with the goal of enabling public agencies to effectively utilize JOC.

The guidelines are recommendations, not requirements. They do not propose modifications to the statute. There is a wide range of resources available for JOC delivery method, and some were used to develop this guideline.

The notes are an integral part of the Guidelines and provides additional content and information.

Topics to be Covered

- Definitions
- Introduction to JOC
- Benefits and Limitations of JOC
- State of Washington Specific
- Contract Procurement Process
 - RFP Development
 - Selection Process
 - Pre-Bid Conference
 - Evaluation Process of Proposals
 - Evaluation Process of Interviews
 - Evaluation Process of Coefficients
 - Evaluation Process of the UPB
 - Diverse Business Inclusion
- JOC Contract Execution
 - Work Order Process
 - Agency Notification of Work and Contractor Initial Response
 - Initial Site Visit and Scope Development
 - Proposal Preparation and Proposal Submission
 - Proposal Approval/Work Order Award Process
- Program Management of a JOC Contract
- Reporting
- Best Practices
- Bibliography

Topic Summary:

The topics outlined here logically follow a typical Washington State Public Owner's creation of a JOC Program, Request for Proposal (RFP) and the flow of a typical JOC Contract. The topics will discuss what a public owner needs to consider while developing the RFP to managing a JOC contract. The guideline also includes specific sections tailored to the contractor who has never done JOC work before. This is not meant to be all inclusive, however these guidelines will hit a majority of the frequently asked items, questions and lessons learned by public owners and contractors.

Definitions

- Indefinite Delivery Indefinite Quantity (IDIQ) - is a method of delivery of an indefinite quantity of specific supplies and services during a fixed period.
- Job Order Contract (JOC) - means a contract in which the contractor agrees to a fixed period, indefinite quantity delivery order contract which provides for the use of work orders for public works as defined in RCW 39.04.010.
- Firm Fix Priced - means a price that is not subject to any adjustment on the basis of the contractor's cost experience in performing the contract.

Slide Summary:

- The definitions are from section 39.10.210 of the RCW and represent a majority of the JOC specific terms.
- A majority of these definitions are universal across all users of JOC.

Definitions

- Unit Price Book (UPB) - means a book containing specific prices, based on generally accepted industry standards and information, where available, for various items of work to be performed by the job order contractor.
- City Cost Index (CCI) - is a percentage ratio of specific city's cost to the national average cost of the same item at a stated period of time.
- Coefficient - means the job order contractor's competitively bid numerical factor applied to the public body's prices as published in the unit price book.
- Non-Pre-priced - means a necessary, but incidental, part of a Work Order that is not covered in the pre-priced tasks in the Unit Price Book.

Slide Summary:

- There are several different unit price books (UPB) in the industry and some of those are: Gordian RS Means, Gordian Construction Task Catalog (CTC), Saylor, Sierra West's Cost Data and many other options depending on the public agencies preference. The most common ones being used in Washington State are Gordian RS Means, and Gordian Construction Task Catalog (CTC).
- The term "Coefficient" is also known as a multiplier or an adjustment factor. It is often thought to be a markup factor, but that is not the case. This numerical value is developed by the JOC Contractor and is multiplied by the UPB. This value could be below or above one (1) depending on the UPB the owner has selected.
- Depending on the selected UPB for the solicitation/contract will determine if there is a CCI. Not all UPB's have a CCI.

Definitions

- Work Order - means an order issued for a definite scope of work to be performed pursuant to a job order contract.
- Work Order Number - means a unique number assigned by the Public Agency associated with an individual Work Order.

Slide Summary:

The term "Work Order" may also be referred to as task order, delivery order or job order issued for a defined scope of work for a lump sum price, under the job order contract.

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Introduction to JOC

- Developed by Army Corps of Engineers.
- Indefinite quantity, multi-year “on call” construction services contract.
- Individual small projects are assigned as Work Orders.
- Contractor is **selected on best value** under qualifications-based criteria.
- Collaborative and integrated process of project development.
- 2003 signed into Washington law.

Slide Summary

- Army Corps of Engineers developed the tool in 1980’s. The Corps found that they needed a procurement tool to allow them to complete smaller projects fast.
- Per the RCW the JOC contract is a base of two years and an option of a third year. This minimizes the administration and procurement process on individual projects, because you are only soliciting once every three years for a contract and the process to complete a project (work order) under the contract is a more efficient process.
- Typical criteria used in selecting the contractors include past performance, staffing, approach in handling a JOC Contract, quality and other criteria.
- JOC laws and implementation is not the same throughout the United States.
- With the JOC contract being a multi-year contract, it is a perfect platform for the owner and the contractor to develop a long-term relationship. It is imperative for the contractor to perform, because the owner does not have any responsibility in issuing additional Work Orders to the contractor if the contractor is not performing on the JOC contract.
- JOC is defined in sections 39.10.420 - .460 of the RCW.

Benefits and Limitations of JOC

Benefits

- Combines commitment, expertise and skills of agency and contractor.
- Reduces total time and cost for smaller projects.
- Could increase opportunities for diverse businesses.
- Lower contract administration cost.
- Reduced workload on in-house staff.
- Sharing of resources, scheduling, cost estimating and control.

Potential Limitations

- **Single** trade projects where little or no coordination is needed.
- Projects with little or no line items are in the unit price book.
- Procurement of larger specialty equipment purchases.
- Pass through contracts.
- Term and value of contract and individual Work Orders have limits.

Benefits:

- Incentive based – good performance by the JOC contractor yields more work; while poor work yields less. This requires the public agency and the contractor to be committed to a successful execution of the contract.
- Simplified procurement – able to procure a contractor to perform multiple projects under one contract. Where the individual projects are awarded using a more efficient and lower-level approval process.
- Provides an “on-call” contractor for projects.
- Transparent – a line-item proposal is supplied on every project.
- The contractor can act as an extension of the public agencies staff.
- Greatest benefit to utilizing JOC is the overall faster delivery of projects.
- According to the JOC Performance 2016 Industry Survey by ASU, public agencies attribute 52% cost savings of agency project management time.

Potential Limitations:

- JOC is not another quote for the work; furthermore, the JOC contractor is bound by a Unit Price Book (UPB); therefore, it is difficult to compare the two directly and should not be compared.
- Because the UPB is typically an industry standard it is difficult to procure specialty equipment with options. There are UPB's available that can be customized.
- The use of “best fit” line items is necessary when the public agency and the contractor are not in agreement on those line items.
- The UPB is limited and may not include certain line items.

Best Practice:

- It is important to note that success is based on a programmatic approach to the contract and not on a project.
- What projects work and which ones do not depend on the individuals that are a part of the owner and

contractor team.

- Align program volume with optimal number of contractor awards to maximize JOC efficiency (*what is your estimated utilization?*)
- Consider and define collaborative design process and early contractor involvement (remember the JOC contractor cannot be the engineer of record!)
- Agencies should consider what UPB to use based on anticipated type of work, and to address adding non pre-priced items commonly used to the UPB. This must also be included in the RFP document.
- When creating a JOC program, understand where pinch-points are for contractors and departments.
- Avoid unintended barriers for all parties (JOC administrator/team, contractor, JOC customer). Incorporate enough flexibility to coordinate with any contractor or agency. If agency utilizes proprietary systems, ensure equal access is available to any potential proposer.
- Work best suited for JOC is work that does not require full design, think of “over the counter” permit types of work.

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State of Washington Specific

- *All* Washington state public bodies are authorized to use JOC.
- Initial JOC term is two years, with an agency option of extending the contract for an additional year.
- No more than three JOC contracts in effect at one time.
 - DES exception: Six in effect at one time

Slide Summary:

The Capital Project Advisory Review Board (CPARB) oversees the use of alternative project delivery methods defined in Chapter 39.10 RCW and advises the legislature on policies related to public work delivery methods as defined by Section 39.10.420 – 39.460 of the RCW.

On this and the next slides are some of the more important specifics of the RCW. It is important the public agency and the JOC contractor understand the RCW. Funding sources, such as federal government, may have additional constraints.

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State of Washington Specific

- At least 90% of work contained in a job order contract must be subcontracted to entities other than the job order contractor.
- Maximum Annual Contract amount is \$4,000,000.
 - Exceptions: DES, Counties > 1 million pop., Cities > 400,000 pop. maximum is \$6,000,000.
- Above excludes sales and use taxes.

Slide Summary:

- The public agency must have a method of tracking the 90% requirement to ensure the criteria is met. The job order contractor must distribute contracts as equitably as possible among qualified and available subcontractors including certified minority and woman-owned subcontractors to the extent permitted by law
- Annual means a 12-month period, not January through December
- Additional information on tracking and reporting is included in later slides.
- At this time, the only agencies that meet the maximum contract amount exception is DES, King County and City of Seattle.

State of Washington Specific - continued

- Unused capacity carries over for one year, *and*,
- Maximum annual volume can not exceed limit of two years.
- Prior to issuing 1st Work Order, Owner may approve, in consultation with OMWBE Office or the equivalent local agency, the Contractor's Diverse Business Inclusion Plan.
- Maximum amount per Work Order is \$500,000, excluding sales and use taxes.
- All Work Orders issued for same project treated as single Work Order for purposes of dollar limits.

Slide Summary:

- It is key to develop a tracking system at the work order level to track contract values, estimates due, estimates submitted, award, notice to proceed (NTP), and completion dates by contract year. There are software solutions available for this.
- This tracking system should be reviewed by the JOC Steering Committee, comprised of representatives from both the agency and contractor. This meeting will be discussed in more detail later in this guideline.
- The Diverse Business Inclusion Plan covers the entire JOC contract performance period and is not required at the Work Order level.
- It is important to note that OMWBE has developed an example Outreach and Contracting Plan that can be modified by the contractor for contract specific requirements. For more information and other best practices please go to the OMWBE website (omwbe.wa.gov).

State of Washington Specific - continued

- 80% of the dollar value of each Work Order must consist of items contained in the UPB.
- New stand-alone permanent structure shall not exceed 3,000 gross square feet.
- The JOC contractor shall publish notification of intent to perform public works projects at the beginning of each contract year in a statewide publication and in a legal newspaper.

Slide Summary:

- In most cases non-pre priced has not been used a lot. If used, a best practice is to request that the contractor obtain three quotes to support the development of the non-pre priced line item. Some public agencies also request that the contractor submit a non-pre priced coefficient to be applied to those developed line items.
- As a part of contract compliance, it is a good idea that the Public Agency request a copy of the public notifications that the JOC contractor has published.

Best Practices:

- Published notification should be wide-spread and specific to the contract. This helps with generating interest from the local contractor communities.
- **The JOC Contractor is encouraged to utilize other** forms of media such as websites for business associations, OMWBE, etc. See list of resources on Appendix A.

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State of Washington Specific - continued

The public body shall establish a committee, including a member with knowledge and experience in state and federal laws, rules, and best practices concerning public contracting for minority, women, and veteran-owned businesses and small businesses to evaluate the proposals.

Slide Summary:

The RCW requires that a public agency establish a committee/panel of stakeholders with particular attention to one of the members being

To meet the requirements of the RCW, you must include someone on the selection committee that has knowledge and experience with state and federal laws around best practices concerning OMWBE, Veteran and Small Business inclusion. This could be someone on staff at the agency, from a different agency, an outside party or third-party consultant. This will be further addressed in Appendix A.

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State of Washington Specific - continued

- The public body is encouraged to post the request for proposals for the Job Order Contract and the availability and location of the request for proposal documents in other areas, such as websites for business associations, the office of minority and women's business enterprises, and other locations and mediums that will further publicize the opportunities.

Slide Summary:

The public body is encouraged to utilize other forms of media such as websites for business associations, etc. See list of resources on Appendix A.

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State of Washington Specific - continued

- Architectural/Engineering (A/E) services cannot be procured under the JOC contract for services not associated with specific Work Orders.
- Any Work Order over \$350,000, excluding WSST, and including over 600 single trade hours shall utilize a State registered apprenticeship program for that single trade in accordance with RCW 39.04.320.

Slide Summary:

- JOC contractor may hire an A/E to perform design work specifically related to a Work Order. Other A/E services must be procured by the agency in accordance with RCW 39.80.040.
- The JOC contractor cannot be the Engineer of Record.
- Not all Washington state public agencies are required to meet the apprenticeship requirement. Refer to RCW 39.04.320 to confirm whether your public agency is included, and criteria required if unable to comply.

State of Washington Specific - continued

- Prevailing wage rates must be the rates in effect at the time the individual Work Order is issued.
- If the agency does not issue Work Orders totaling the minimum amount stated in the RFP, the contractor's remedy is payment of the difference between minimum Work Order amount and the actual total of the Work Orders issued multiplied by an appropriate percentage for overhead and profit contained in the contract award coefficient.

Slide Summary:

- Job order contractors shall pay prevailing wages for all work that would otherwise be subject to the requirements of chapter [39.12](#) RCW. Prevailing wages for all work performed pursuant to each work order must be the rates in effect at the time the individual work order is issued.
- The agency must be confident when determining the minimum aggregate value of Work Orders they anticipate to award within the JOC contract when developing the RFP. If, in the initial contract term, the agency, at no fault of the JOC contractor, fails to issue the minimum aggregate value of work orders stated in the RFP, the agency shall pay the contractor an amount equal to the difference between the minimum work order aggregate value and the actual total of the work orders issued multiplied by an appropriate percentage for overhead and profit contained in the contract award coefficient for services as specified in the request for proposals. This is the contractor's sole remedy.

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Contract Procurement Process - RFP Development

- Understand the RCW's.
- Determine the evaluation criteria.
- Determine the scoring matrix and weighting.
- Determine the Unit Price Book (UPB) to be used.
- What, if any, sections of the UPB will be excluded.
- What is included in the Coefficient.
- Determine the coefficients that need to be priced.
- Estimate the annual volume of JOC work orders anticipated.

Slide Summary:

- It is important that the public agency understands the RCW and will have the volume of work to support a JOC Program.
- The public agency also needs to determine the criteria on which they will be evaluating the contractors. Some of the typical evaluation criteria are; management concept; professional personnel ability; location of firm; current projects of the firm; recent, current and projected workload of the firm; references; reference projects; safety program; diverse business outreach and goals.
- It is critical to understand and put into the solicitation what UPB will be used. There are UPBs that can be customized specifically for a public agency. It is necessary that the public agency understand the UPB that was selected, and to determine what section of the book that will be excluded. Typical sections of the UPB that are excluded are: construction management fees, models; renderings; contingencies; allowances; job conditions; sales and use taxes; personnel; Insurance, office expenses; mark ups; overhead; performance bonds.
- It is also critical to understand and put into the solicitation which elements shall be included in the coefficient as necessary to establish a firm fixed price on work orders. Typical items in the coefficient are; overhead, profit, management administration costs; insurance, direct costs; performance bonds.
- The more sections of the UPB you remove from being used the more your coefficient will be increased to account for those items.
- It is important to mention that depending on how you define these requirements will also limit the contractors who will be bidding. One of the most common comments is: "How can I become a JOC contractor if I can't win a contract because I am not a JOC contractor."
- There are 3rd party firms available to help support public agencies in developing, implementing, and administering JOC program.

- The public agency JOC contract management staff should develop a procedures manual, to include roles and responsibilities, and the process to administer JOC from inception to closeout. This includes training the staff on how to use the contract.
- Very common to state 1 work order of \$350,000 - \$500,000 worth as a minimum amount.
- Owners should think strategically about how often and when they would use a JOC, it is not the best tool for only one small project.

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Contract Procurement Process - RFP Development

- Establish Annual Contract volume
- General scope of work that will be completed on the contract
- Selection Schedule
- Selection Criteria
- Minimum Qualifications
- Milestone Schedule w/Target Dates
- Submittal Requirements
- Bonds and Insurance
- Project Management Software
- Estimating Software
- Diverse Business Inclusion Requirements
- Cost estimating and methodology

Slide Summary:

- Align the total JOC program volume with the optimal number of contractor awards to maximum JOC efficiency (what is your estimated utilization?) *start with 1 contract and re-evaluate after 6 months.*
- Establish clear guidelines for contractor selection or assignment if multiple contractors are awarded.
- See Exhibits to this Guidelines Document for examples of public agency RFP's and JOC contract documents.
- Consider the timeline for the RFP process, including publication, evaluation, selection and award.

Best Practices:

- The RFP should be written to allow any general contractor with experience managing various trades/subcontractors and strong local market knowledge to qualify.
- Public works experience should be preferred, but not required (except mandatory L & I training).
- Estimating and Methodology: Ask the proposers to describe what cost-estimating, tracking systems and techniques their team will employ to deliver the Work Orders on time and within budget.
- Request that the firm describes how they will respond to agency questions regarding Work Order proposal costs.
- Scheduling Work Order Construction Approach: Require that the firm provides their construction scheduling approach. At a minimum, address the following: How will they assure and be responsive to agency scheduling needs; and how will they address risk-laden timelines or unrealistic agency schedule expectations.
- The public agency should consider specifying number and size of pages; double-sided, page size; bound or not bound; presented in order of evaluation criteria listed; number of originals to be submitted; if electronic copies are acceptable.

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Contract Procurement Process - Selection Process

- Request for Proposal issued
- Pre-Bid Conference
- Evaluation based upon qualifications, and other factors (exclusive of price)
- Establish a committee/panel to review proposals and conduct interviews
- Proposals scored and firms ranked
- One or more interviewed
- Interviews scored and firms ranked
- Shortlisted firms submit final proposals, with price
- Final proposals scored
- Firm with highest total score awarded contract

Slide Summary:

- Typically, the JOC procurement is made up of three elements and those elements are: Technical, Interview, and Coefficient. Some public agencies will have each element be a separate phase where they have an opportunity to short list firms through each phase and sometimes the process will be two phases where the interview and coefficient are completed during the same phase.
- The RCW requires that a public agency establish a committee/panel of stakeholders with particular attention to one of the members being

To meet the requirements of the RCW, you must include someone on the selection committee that has knowledge and experience with state and federal laws around best practices concerning OMWBE, Veteran and Small Business inclusion. This could be someone on staff at the agency, from a different agency, an outside party or third-party consultant.

- For those agencies that do not have a DEI staff we recommend the following:
 - Contact OMWBE for recommendations on a representative from the diverse business community to be part of JOC evaluation process.
 - Consider, maintaining relationships with professional organizations or diverse business advocacy groups that can assist in such times such as:
<https://omwbe.wa.gov/resources-small-businesses/more-resources/resource-partners>
- Typically, three qualified firms are selected from the technical phase to go on to the interview and two to

three qualified firms submit coefficients. This is not a written rule – it is up to the individual public agency to determine how many qualified firms move to the next phase.

- The selection process requires the agency to be transparent and objective. It is important to allow adequate time to conduct the process including the review and scoring of the finalist's interview and coefficient(s).
- Final proposals are publicly opened.
- It is important to have as part of the solicitation, the scoring criteria to include weighting. It is typical that a mathematical formula is used to determine the final score. That formula also needs to be included in the solicitation.
- Typical solicitation period for Contractor's to submit qualifications is 3-4 weeks, sometimes longer.

Best Practices:

- It is recommended to have a balanced selection panel of different stakeholders that will be working with and using the contract. Panelists should have the knowledge and experience to evaluate responses to the solicitation.
- Develop a score card for the reviewers to use to score contractors proposals and interviews.
- Develop an Excel spreadsheet to calculate all results from the individual score cards.
- Remember as you proceed through the process that all responses to the RFP, all evaluator's comments, scorecards and final calculated results will be public records and subject to public disclosure upon request. Records that are organized will assist with this process.
- The public agency should consider publishing advanced notice of intent to solicit bids for JOC to give diverse businesses additional time to consider participating in the solicitation.
- Owners could run a couple of scenarios ahead of advertisement to identify and make corrections to the weighting of the criteria to address any unfair scoring scenarios. (e.g. coefficient and pricing scored in a way that allows the contract to go to the lowest bidder.)

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Contract Procurement Process - Pre-Bid Conference

Agency Specific

- Review key terms of the JOC Contract.
- Discuss the steps to develop a Work Order.
- Explain expectations for preparing a price proposal.
- Explain Coefficient, what is and is not included.
- A sample price proposal exercise.
- Sufficient time for questions and answers.

Contractor Specific

- Volume through the contract.
- Types of work.
- Typical users of the contract.
- Understanding the expectations of the public agency.
- Have a diverse business inclusion approach.

Slide Summary:

- It is important to have a Pre-bid Conference. This conference is the best time for the public agency to explain the contract and JOC process in detail.
- Some public agencies will make the Pre-bid Conference mandatory.

Agency:

- Pre-bid participants should include agency's project management team including the project manager, contracting expert, safety representative, staff responsible for diverse business inclusion and Inclusion Plan and administration of same, and contract sponsor or executive. Also include the contracted 3rd party JOC program administrator, if applicable.
- Share the steps the agency will take to develop work that might go through the JOC and expectations on how the agency will engage the JOC and approve work orders. (e.g. reviews, design, work order proposal contents, etc.) Anything that will help the JOC understand the level of effort and team members they will want assigned to support.
- Present the known work anticipated to be awarded and typical to your agency; type of work and locations.
- Share all specific safety requirements and restrictions per location; such as background checks, badging, or federal regulations for access.
- Discuss the Unit Price Book to be used, excluded items and language pertaining to specific added items if applicable.
- Discuss diverse business inclusion, past performance expectations, etc.
- Develop a process for contractors to submit questions during the bid window.
- Discuss the interview process and any agency specific items that the Contractor should know when interacting with your agency.

Contractor:

- It is important to fully read and understand the solicitation documents prior to the pre-bid conference. This allows for adequate time to ask questions and request answers prior to the deadline for submitting questions.
- It is important to understand the volume that is anticipated for the contract. This will help when assessing staffing and other general conditions items that are a part of the coefficient being applied to the UPB.
- Understanding the types of work will help the contractor understand the types of projects to illustrate past performance. It is also important to understand that from a coefficient standpoint. Not all sections of the individual UPB's costs associated with certain types of work will vary.
- Like all solicitations it is always important to know who might be your competition.

Best Practices:

- If the pre-bid conference is mandatory, include emphasis on this in the RFP. It is recommended that you schedule at least 2 pre-bid conferences to accommodate contractor's schedules. Also include in the RFP what action the agency will take if a proposal is received by a firm that did not attend the pre-bid conference, such as disqualification.

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Contract Procurement Process - Evaluation Process for the Proposal

Agency Specific

- Evaluate and score the Proposals based on criteria in RFP.
- Shortlist, if appropriate.
- Conduct Interviews.
- Request Final Proposals, Including Cost.
- Score Final Proposals.
- Firm with Highest Score is Awarded the Contract.

Contractor Specific

- Proposal align identically to the RFP.
- Completely understand the solicitation.
- Describe each criterion.

Slide Summary:

- The evaluation and scoring of proposals process is extremely important. Create a fair and equitable method of scoring the proposals at each phase.
- The scoring of criteria must align identically to the items listed in the RFP.

Agency:

- To minimize subjective scoring, consider using qualitative scoring for each criteria. Example: 90% - 100% (Exceptional), 70% - 89% (Good), 40% - 60% (Acceptable), 20% - 39% (Marginal), 0% - 19% (Poor).
- Don't rush it! Provide enough time for the evaluators to thoroughly review the proposals and provide scores.
- Its key to follow your bidding documents. If you don't know the exact steps "reserve your rights" in the documents.

Contractor:

- It is important that the contractor's proposal aligns identically to the solicitation. This not only helps the contractor in verifying they have responded adequately to the solicitation, but it helps the public agency score the solicitation.
- Be succinct in your response. Use tables and graphics to help support your proposal.
- Pictures can be worth a 1,000 words.
- If you are asked to provide sample projects or contracts, describe why you chose each and how they are relevant. It is not always obvious what similar in scope and size means.

Best Practices:

- Identify interview process and questions early (weighted vs non weighted questions).
- Qualifying questions can be asked about specific proposals, however, ensure this is identified as an agency option early in the process so that all proposers are aware this may occur.
- The interview process should also be detailed and may require its own milestone schedule.

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Contract Procurement Process - Evaluation Process for the Proposal

Example of Scoring

- Qualifications of Proposer - 150 Points
 - Qualifications of Proposer's Key Personnel - 150 Points
 - Proposer's Approach to Executing a Project - 150 Points
 - Outreach Efforts and Commitment to include Diverse Businesses- 50 Points
- Total - 500 Points

Slide Summary:

This is one example of evaluation criteria weights for evaluating the qualifications of the bidder prior to requesting final cost proposals.

Agency:

- The public agency shall determine the number of points for each criterion and total amount best suited to them.
- One approach is to use a qualitative assessment scoring method: (90-100% Exceptional, 70-89% Good, etc.)
- Another methodology to scoring - would be ranked scoring/determine weights of question (what questions are more important? - worth more)
- In evaluating the ability of the proposer to perform the job order contract, the public agency may consider: The ability of the professional personnel who will work on the job order contract; past performance on similar contracts; ability to meet time and budget requirements; past performance on approved subcontractor inclusion plans; ability to provide a performance and payment bond for the job order contract; recent, current, and projected workloads of the proposer; location; and the concept of the proposal.

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Contract Procurement Process - Evaluation Process for the Interview

Agency Specific

- Develop a list of questions.
- Inform the interviewers what your expectations are and the topics to be covered.
- Interview scoring criteria.
- Have a panel for the interview

Contractor Specific

- Select the team to be at the interview.
- Determine what is needed to present.
- What can be added to support the interview.
- Practice.

Slide Summary:

- Typically, at this stage the top three firms have been selected to present. This selection is based on the scoring of the technical proposals.
- Include an allotted amount of time in your interview invitation for each of the parts mentioned above.
- Interviews are typically broken up into three parts. The parts are as follows: panelist introduction; contractor presentation; question and answers. Some public agencies will add an example project for the JOC team to “propose” on and present. It is thought that Work Order pricing is the most difficult for owner teams to fully appreciate so it may be helpful to see how JOC teams assess work, use the UPB and put cost together. This should align with their approach to the Work.

Agency:

- Prepare questions for each contractor to clarify their proposal and fill in the “gaps” identified by the evaluation team.
- Include an allotted amount of time in your interview invitation for each of the parts mentioned above.
- Questions could also include general questions that all contractors would be asked.
- It is recommended that the public agency does not publish the interview questions in the RFP. This would make it difficult to change and add to.
- Request that the contractor team consist of their Project Manager, on-site Superintendent, contract administration, safety, and other experts related to the work, such as environmental compliance.
- Pose questions of the JOC Contractor that can be responded to regardless of previous JOC experience.

Contractor:

- This is the time to illustrate your teams understanding of the solicitation and that you have a cohesive team.

- It will be important to determine your strategy on presenting. Is a formal slide presentation needed or is there a better way to present the material.
- Understand your audience. This will be key in determining your presenting strategies.
- Make sure that you have responded to the public agency's questions.
- It is always a good idea for the interview team to practice presenting the presentation before interview.
- Be sure to understand from the Agency ahead of time what type of presentation materials are allowed during the interview.

Best Practice:

- It is also recommended that the JOC team talks through their Inclusion Plan and discusses how they intend to meet their inclusion goals proposed.

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Contract Procurement Process - Evaluation Process for the Interview

Example of Scoring

Presentation - 50 Points

Synergy of the team - 50 Points

Response to questions - 100 Points

Total - 200 Points

Slide Summary:

- The example of items and points are related to the interview process only. The results of the interview scoring would be added to the RFP qualification scores.
- The public agency may determine the number of points for each criterion and total amount best suited to them.

Contract Procurement Process - Evaluation Process of the Coefficient

Agency Specific

- Explain the rating criteria.
- Determine how many coefficients will be priced.
- State if the book will change annually or if the book will remain the same.
- If applicable, state if CCI will be updated annually or when issued by the UPB vendor.
- Understand Divisions 00 and 01 line items.
- Clearly identify what items are to be included or allowed in the coefficient.

Contractor Specific

- Understand what will and won't be included in the coefficient.
- Understand what sections of the UPB will be excluded.
- Understand what UPB has been selected for the contract.
- Understand subcontractor market conditions in the area.
- Understand the types of work that will be completed on this contract.

Slide Summary:

- Typically, the firms that have been selected to present are also asked to supply coefficient(s). Usually, the coefficient(s) are submitted at the same time as the interview or at a date and time as determined by the agency. Occasionally a public agency will score the presentation and then request the highest ranked firms from the interview phase to supply coefficients at a date and time as determined by the agency.
- Depending on the agency the typical requested coefficients are: standard hours; non-standard hours; non-pre-priced. Some agencies may include coefficients for working in high secured facilities, remote locations, or other agency specific requirements.
- It is important to reiterate here that the coefficient is not a "mark up" of costs. The coefficient is an adjustment that is applied to the UPB.

Agency:

- Ensure that staff is well trained in the use of the Unit Price Book and Coefficients. There are companies available to provide the training.

Contractor:

- It is important for the contractor to understand all the items that are required to be a part of the coefficient to ensure nothing is missed.
- For those contractors who have little to no experience in developing a coefficient a best practice is to take projects that have been completed and develop a line-item estimate using the UPB. Once the line-item estimate is completed compare the cost of the completed vs the price from the UPB. It is also important to analyze major divisions of work as well, because some sections of the different UPBs pay differently in some divisions than others.

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Contract Procurement Process - Evaluation Process of the Coefficient

Example of Scoring

Composite Coefficient = Coefficient₁ x Weighted Multiplier₁ + Coefficient₂ x Weighted Multiplier₂...

Percent above lowest composite coefficient = [(Proposed composite coefficient - Lowest composite coefficient)/Lowest composite coefficient] x 100

Lowest Composite 100 points

Composite coefficient within 10% of low conforming value 80 points

Composite coefficient within 20% of low conforming value 60 points

Composite coefficient within 40% of low conforming value 40 points

Composite coefficient within 60% of low conforming value 20 points

Other 0 points

Total 100 Points

Slide Summary:

This is one example of calculating the coefficient. Additional examples can be found in the documents listed in the Bibliography.

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Contract Procurement Process - Evaluation Process of the UPB

- Types of UPB
- How the UPB Works
- What is included in a line item
- Win some lose some

Types of UPB:

There are several different unit price books (UPB) in the industry and some of those are: Gordian RS Means, Gordian Construction Task Catalog (CTC), Saylor, Sierra West's Cost Data and other options depending on the public agencies preference. The most common ones being used in the State are Gordian RS Means, and Gordian Construction Task Catalog (CTC).

How the UPB Works:

- Standardized format and descriptions.
- Line items are broken down by Construction Specifications Institute (CSI) division.
- Depending on the selected UPB, demolition activities may be included specifically with each line item, captured generally at the beginning of each CSI division or missing altogether.

What is included in a line item:

- Line items are typically a summation of materials, labor and equipment costs associated with the description of the line item.
- Line items are unit/quantity based.
- The labor cost associated with the line items reflect productivity based on actual working conditions.
- The equipment cost associated with the line items reflect not only rental but also operating costs for the equipment under normal conditions.

Win some lose some:

- There are line items in any UPB that represent a unit price in some cases more or less than actual cost of the work.
- Typically, the lower the quantity, the cost to deliver the task is higher.
- Depending on the UPB used, not all line items include everything it takes to install a piece of equipment.

Best Practice:

- Contact local public agencies utilizing JOC for examples of work order price proposals developed using the

UPB to better understand how the UPB is used. There are also third-party companies that can provide training.

Contract Procurement Process Diverse Business Participation

Agency Specific

- Be clear in the goals for the contract.
- Include the contractor's Inclusion Plan in the evaluation criteria.
- Specify the reporting and the format required.
- Prioritize efforts to solicit proposals from certified minority or certified woman-owned contractors.

Contractor Specific

- Understand the goals of the contract.
- Understand how the percentage of participation is calculated.
- Plan extensive outreach.
- Tracking system to track outreach and subcontractor qualifications.

Slide Summary:

- A JOC program may increase the opportunity to utilize minority, women and disadvantaged businesses. RCW 39.10.430 amended in 2021 to include prioritizing outreach efforts to include minority and woman-owned contractors.
- For purposes of this discussion "inclusion" refers to the strategies used by both the agency and the JOC contractor to facilitate the use of diverse businesses.
- Inclusion starts, as discussed, with the selection and contracting process. Past performance on projects of similar scope and size should give an indication of success on a new contract.
- Goals don't have to be dollars or percentages. Goals and inclusion strategies could be things like new businesses, technical assistance and capacity building, the number of diverse businesses (e.g., not just the same diverse finish carpenter on every work order but several in different categories).
- Also note subcontracting processes in general. How are teams selecting or engaging subcontractors during scoping and proposal development. Perhaps there are goals or expectations around inclusive business practices. Pieces like "quick pay" practices.

Agency:

- OMWBE website has a specific section with regards to best practices to increase participation by small and diverse businesses in public agency procurement.
- Partner with the contractor to attend regional outreach events: such as the Greater Pierce County Purchasing Forum, WSDOT Outreach, and Alliance Northwest.
- Advertise the JOC bid solicitation on <https://omwbe.wa.gov>.
- Other resources for outreach: Business Impact NW, King County Small Contractors and Suppliers, WSDOT Small Business Services Program, USDOT Small Business Program, The Procurement Technical Assistance Center. In addition, the Capital Project Advisory Review Board (CPARB) Business Equity/Diverse Business Inclusion Committee can assist with outreach efforts for both the agency and

contractor. Other resources are on the following slides.

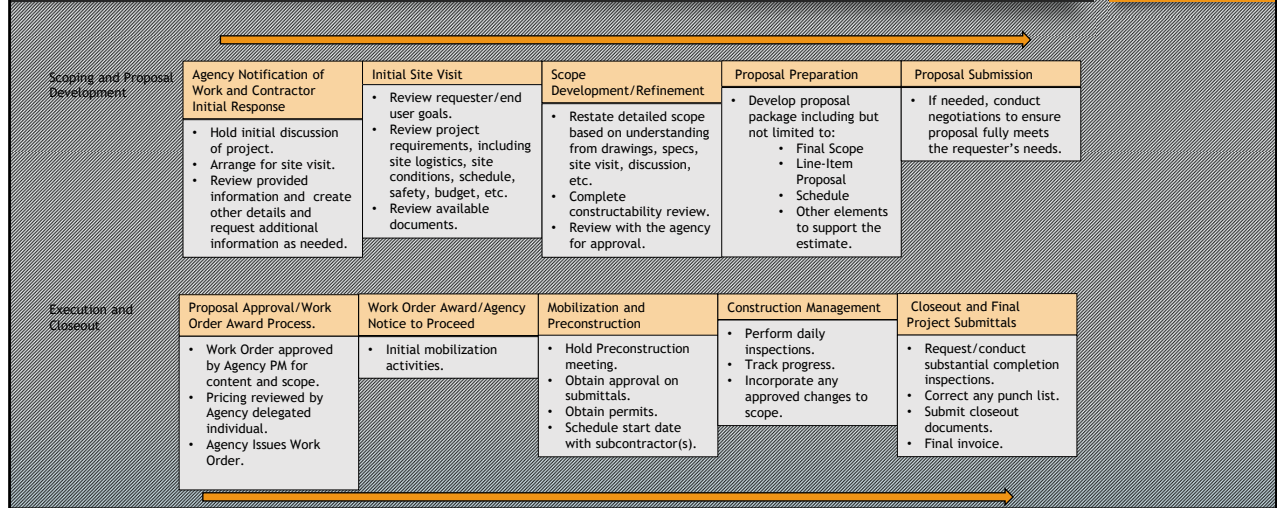
- Monitor the contractor's subcontracted inclusion results regularly to review participation percentage and partner to increase if necessary.
- If the agency has goals stated, ensure that the contractor has authentic and real inclusion strategies. Don't force the conversation but agree to a thoughtful and intentional plan.

Contractor:

- A large list of qualified and dependable firms are important to the success of the JOC contractor.
- Outreach events are an important part in finding new firms.
- It is important to work with the public agency Diversity, Equity and Inclusion representative, or similar position.
- It is also important to document the efforts in outreach and contacting diverse business firms to bid the different projects under the JOC contract.
- The JOC contractor shall publish notification of intent to perform public works projects at the beginning of each contract year in a statewide publication and in a legal newspaper of general circulation in every county in which the public works projects are anticipated. Additional publications are encouraged to ensure a wide outreach to potential subcontractors, including diverse businesses. Refer to Appendix A for additional resources.
- Attempt to remove barriers for diverse businesses such as limiting subcontractor bonding and insurance requirements as much as possible.

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JOC Work Order Process



Slide Summary:

- The best JOC contract will have a streamlined Work Order process that everyone has agreed to.
- This is the typical process of a work order from start to finish. You will see that the biggest difference in this contracting method versus another is the scope development and pricing phases.
- The most important part of the process is a detailed scope of work that everyone agrees to. This scope not only demonstrates the team's understanding of the project but is also the basis of the line-item estimate. The more detail the easier it is to validate the line-item estimate.
- Unit prices from the UPB can not be negotiated. Negotiations can include refining the scope of work, and the line items and quantities to complete the scope of work.

Best Practices:

- Agency develops a group that will determine what projects will be issued to the contractor.
- Hold a pre-construction meeting to kick off the contract.
- Set up a JOC steering committee to meet at a minimum of quarterly to discuss process, workload, diverse business participation, issues and any other notable topics.
- Both the agency and contractor should have a JOC champion for the contract and these two will be joint chairs of the steering committee meeting.
- Encourage the contractor to conduct value engineering and recommend changes to the scope of work that gains efficiency and provides potential cost savings.

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Agency Notification of Work and Contractor Initial Response

- Hold Initial Discussions regarding the Work Order
- Arrange Site Visit
- Review and develop items for the JOC Contractor
 - Overall statement of work
 - Objectives
 - Desired start date
 - Substantial completion date
 - Constraints
 - Specific design requirements (dimensions, quantities, materials, etc.)

Slide Summary:

Work order request to execution process best practices.

Best Practices:

- Have a “flow” and process decided ahead of time.
- Know how and what the agency will prepare to request the JOC contractor to look at a project and price.
- Know who the stakeholders and end users are and how they will be involved in the process.
- Have a Rough Order of Magnitude (ROM) as to what you think a project costs before getting the JOC involved.
- Performance criteria, level of design needed for permit, coordination on the owner side (e.g., will the work require you to shut down areas, etc.).

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Agency Notification of Work and Contractor Initial Response

- Review and develop items for the JOC Contractor
 - Tax implications - subject to Rule 170 or 171?
 - Safety concerns, requirements
 - Security logistics - background checks or badges required
 - Parking and laydown areas
 - Impacts - noise, air, etc.
 - Permits obtained and/or required, who pays?
 - Submittal items required
 - Materials purchased by agency

Slide Summary:

Agency's considerations before requesting pricing from the JOC contractor.

Best Practices:

- Agency's need to have a clear internal process on how they "develop" projects before requesting the JOC contractor to price.
- It is potentially challenging when you use the JOC for funding request development, project managers, designers, etc.

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JOC Work Order - Initial Site Visit and Scope Development

Initial Site Visit

- Review requester/end user goals.
- Review project requirements, including site logistics, site conditions, schedule, safety, budget, etc.
- Review available documents.
- Discuss deadlines for scope refinement, review and proposal submission.

Scope Development

- Restate detailed scope based on understanding from drawings, specs, site visit, discussion, etc.
- Complete constructability review.
- Review with the agency for approval.
- Key is to agree on scope prior to starting the line-item proposal.

Slide Summary:

- This slide details out some of the specific activities that may and should be covered at an initial site visit.
- It is important at the initial site visit to walk through the different elements of the work and be prepared that this may take more than one walk; especially if you are dealing with a project that is not defined at this stage.
- It is imperative that the JOC contractor collaborates in the development of the detailed scope of work for the project. This may take time depending on the detail of the project and the numbers of questions that are developed and need to be answered by the public agency.

Agency:

- Bring any documents, specifications and as-builts that will help the team to understand the existing conditions; for example, electrical panels to be used to connect to, location of water, sewer and other utilities to be tied into.
- If a designer is a part of the project, it would be a good idea to have the designer at the site visit with the contractor.
- Invite the key stakeholders to the site visit. This will help with scope development and or refinement.
- Make the contractor aware of any particular makes and models of equipment that the end user wants to be used on the project. This is a good time to make the contractor aware if there is any schedule and budget constraints for the project.

Contractor:

- It is important that the contractor develops a scope of work and add any other details necessary regardless of what is received from the agency. This shows the contractors understanding of the project and, also allows the contractor to get buy in from the key stakeholders before pricing.
- It is important to think through the project in detail. This helps with minimizing change orders. In JOC contracting, change orders are not always in the interest of the JOC contractor. This is typically due to the

UPB and the subcontractor prices.

- It is always a good idea to get input from subcontractors on the scope of work.
- This is the contractor's opportunity, based on the scope of work, to utilize diverse business subcontractors and vendors.

Best Practices:

- The key to a well ran project is a detailed scope of work; where all key stakeholders have reviewed and approved the scope.

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JOC Work Order - Proposal Preparation

- Contractor prepares Work Order Proposal which includes:
 - Technical Scope of Work
 - Priced Item List based on the UPB number, quantity, unit price, and coefficient
 - Non-Priced Item List with item name, type of material, type of work, quantity, unit price for labor hours, as applicable
 - Permits and other fees listed separately
 - Estimated start date and duration to complete work
 - Long lead items for materials
 - Assumptions
 - Exclusions
- Owner prepares independent Cost Estimate based on UPB and Coefficient

Slide Summary:

- In all intent and purpose the ownership of these steps are on the JOC contractor.
- This is where the JOC contractor takes the scope of work and begins to develop his line-item proposal, schedule and other supporting documents together.
- The more detail and specificity the contractor has in the scope of work, the easier it is to develop and review the line items proposal.

Agency:

- Remember your established work order flow and roles and responsibilities of your team members.

Contractor:

- The estimating phase is the most time consuming and underestimated process. This is largely due to developing a detailed price proposal and adding the specific items to the proposal to allow for a thorough review.
- When developing your line-item price proposal you will find that there are assumptions that need to be made regardless of how good it is believed the scope is. Make sure you are documenting those assumptions, so you can come back to them. This is commonly where there is a difference between the contractor's proposal and the public agency's independent estimate.
- Your price proposal needs be able to stand alone and give the public agency what they need to understand your line-item proposal and your understanding of the project. The better you do this the quicker the agency can review the proposal.

Best Practices:

- The scope of work is aligned with the proposal and the proposal is filtered in the same break down as the scope of work.
- Add detail notes to include how you got to the quantities on your line-item proposal.
- When budgets are tight it is always a good idea to develop option items.

- Use software designed for JOC Contracting and integration of the UPB data.

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JOC Work Order - Proposal Submission

- Public agency reviews proposal for completeness.
- Review is based on reviewing and agreeing with the line items and quantities.
- Parties compare price proposals, make any adjustments and reach agreement.
- Work Order is prepared and signed by Contractor and Agency.

Slide Summary:

During this phase, the public agency reviews the contractor's proposal for completeness. Verify budget availability, to ensure that there is adequate uncommitted funds within the current contract year, and that the work order total is below maximum allowed.

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JOC Work Order- Proposal Approval/Work Order Award Process

- Work Order approved by agency authorized representative for content and scope.
- Pricing reviewed by agency delegated individual.
- Agency issues Work Order.
- Agency issues Notice to Proceed

Slide Summary:

- The public agency has the ownership of this step.
- It is important that a well thought out process is developed to streamline the process. This is the agency's opportunity to shorten the time in awarding a work order over other procurement methods.

Agency:

- The Work Order approval process should be designed by the agency to fit the specific authorization levels and management structure and included in the procedure manual.

Best Practices:

- To streamline the award and approval process a Work Order Form has been developed by the DES to act as the pricing and award document for each Work Order. This minimizes that amount of additional paperwork. This is just one example and there are other tools available to support this process.
- Another best practice is to determine the lowest level of signature authority as possible on approving and signing work orders.
- A preconstruction meeting will provide an opportunity for stakeholders to finalize schedule and discuss JOC contractor's diverse business inclusion plan for this Work Order.
- Include applicable prevailing wage rates in your Notice of Award or Notice to Proceed for each work order.

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Program Management of a JOC Contract

The JOC Contract is a Program and requires
Program Level Management

Slide Summary:

- It is important to remember that the JOC contract is a program, therefore it requires program level meetings and management and not just work order specific meetings. The program level meeting allows for streamlining the JOC Process, conflict resolution, priority management and subcontracting, diverse business inclusion, and roles and responsibilities discussions.

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Program Management of a JOC Contract

Agency Perspective

- Contractor should be part of agency's team and brought in early during the design and concept phase
- Let the JOC contractor help your agency team with value engineering, better solutions, design and concepts where appropriate.
- Agency PM/CM assigned at each Work Order
- Agency Representative should understand the UPB
- Provide on-site supervision
- Understand the Contract and enforce provisions
- Provide recommendations for subcontractors when requested by contractor
- Conduct weekly meetings to review status of one, or all, open Work Orders
- Monitor contractor's diverse business utilization and outreach efforts

Contractor Perspective

- Schedule and hold quarterly steering committee meeting with key stakeholders of the JOC Program.
- Develop a tracking sheet or an agenda with the key stakeholders for the steering committee meeting.
- Understand the agency's process and procedures
- Proactively and openly discuss concerns and processes
- Schedule project specific meetings to discuss projects specifics.
- Continuity with staffing on projects are key.

Slide Summary:

- It is a best practice for effective and well run JOC contracts when the agency and contractor can collaborate and work through problems in a positive manor. The key is when both sides "trust" each other.
- It makes sense to have a set agenda developed for a steering committee meeting and one for a work order meeting. This ensures that everyone stays on task and what to expect.

Agency:

- Again, understand your expectations and make intentional program management decisions. Perhaps your contracting teams can support the overall program and multi-year contract management, while your project delivery personnel are focused on the individual work orders.

Contractor:

- The JOC contractor works with the agency to develop an agenda for the steering committee and work order meeting. Most times the agenda for a work order meeting is the same one used for other projects.
- Develop a spreadsheet to track the individual work order by contract year, contract amount and diverse business utilization at the minimum. Work with the agency to determine other items that need to be added.
- To be able to maximize the contract it takes being proactive, being open to discuss concerns and providing a quality project on time.

Best Practices:

- Develop a steering committee with a senior management team of the agency and the contractor. This meeting is typically conducted quarterly, however some agency's hold them more frequently or less depending on the need.
- When there is conflict on how the JOC process is working or not, it has been found to be valuable to bring the project management staff together from both organizations to determine ways to make the process

more efficient. This meeting should be run by senior management from the public agency and the contractor.

- There are software solutions such as B2G Now and LPC Tracker that the public agency could utilize to validate contractor's diverse business inclusion tracking.

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Closeout of the Work Order and JOC Contract

- Timely closeout of each Work Order is important.
- Complete documentation of the final cost, schedule and scope of work
- Subcontractor utilization, including subcontractor name, diverse business classification, amount paid.
- Intents and Affidavits for JOC contractor and all subcontractors.
- Aggregate all individual Work Order data for full JOC contract closeout file.

Slide Summary:

- It is very important to manage and record all documentation related to each individual Work Order as each one is finalized.
- Documentation should include the final work order proposal, scope of work and schedule; the diverse business outreach and utilization, JOC contractor and all subcontractor Intent to Pay Prevailing Wages and Affidavit of Wages Paid.
- Warranties and Operation and Maintenance Manuals
- Record the final amount of the Work Order and amounts paid to each subcontractor.
- The percentages subcontracted and self-performed. Remember – 90% of each Work Order must be performed by subcontractors.
- Consolidate all individual Work Order data into reports for JOC contract closeout.

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Reporting Per RCW 39.10.460

Each public body shall maintain and make available the following information for each job order contract:

- A list of work orders issued
- The cost of each work order
- A list of subcontractors hired under each work order, including whether those subcontractors were certified small, minority, women, or veteran-owned businesses; and
- A copy of Intent and Affidavits for each work order

Slide Summary:

- Data collection is an important function to show transparency of the JOC Contract..

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Best Practices Highlights

- Have a JOC Champion on the agency side and the contractor side.
- The State of Washington requires that 90% of the work on a work order to be completed by subcontractors, so this is a great way to increase opportunities for diverse businesses.
- Have a balanced selection panel of different stakeholders that will be working with and using the contract.

Slide Summary:

The next four slides summarize the best practices that have been found uniformly across the stakeholders who were a part of the development of these guidelines. It is important to note that the committee, and current agencies are available to ask questions of.

A JOC Champion is an internal subject matter expert and typically a senior member of your staff that advocates for the JOC program and identifies any needed adjustments to the JOC Procedures Manual to ensure success.

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Best Practices Highlights

- Develop a score card for the reviewers to use to score contractors proposal and interviews.
- Develop an Excel document to calculate all results from the individual score cards.
- Agency develops a group that will determine what Work Orders will be issued to the contractor.
- Hold a pre-construction meeting to kick off the contract, and each Work Order.
- Setup a JOC steering committee to meet at a minimum of quarterly to discuss process, workload, diverse business participation, issues and any other notable topics.

Best Practices Highlights

- Both the agency and contractor should have a JOC Champion for the contract and these two will be joint chairs of the steering committee meeting.
- The key to a well ran project is a detailed scope of work; where all key stakeholders have reviewed and approved the scope.
- The scope of work is aligned with the proposal and the proposal is filtered in the same break down as the scope of work.
- Add detail notes to include how you get to the quantities on your line-item proposal.
- Agency annual review of contract and incorporate any needed updates identified.

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Best Practices Highlights

- When budgets are tight it is always a good idea to develop option items.
- Use software designed for JOC Contracting and integration of the UPB data.
- Streamline the award and approval process.
- Determine as low a level of signature authority as possible on approving and signing work orders.

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JOC Committee

Linda Shilley (Chair) - Pierce Transit
Quinn Dolan (Vice Chair) - Centennial
Randy Horn - Gordian
Aleanna Kondelis - Akonda
Anna Daeuble - University of Washington
Amanda Lanier - Sound Transit
Maja Huff - Washington State University
Brent LeVander - Centennial
Eric Lindstrom - FORMA Construction
Gina Owens - City of Seattle
Brian Thomas - Department of Enterprise Services.

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JOC Performance 2016 Industry Survey by ASU

Slide Summary:

- Above are references that were used in the development of this guideline.
- As a part of the guidelines you will find sample JOC Solicitations, Contracts, and other documents around JOC.

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Department of Enterprise Services, 2019, “Job Order Contract Manual”, RFP

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Slide Summary:

- Above are references that were used in the development of this guideline.
- As a part of the guidelines you will find sample JOC Solicitations, Contracts, and other documents around JOC.

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APPENDIX A

Diverse Business Outreach Distribution List

Slide Summary:

Diverse Business Outreach List for Public Agency and Contractor

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APPENDIX A Diverse Business Outreach Distribution List

Organization	Contact Name	email	website
• NW Mountain Minority Supplier Development Council	Fernando Martinez	fmartinez@nwmtmsdc.org	https://nwmtmsdc.org
• Minority Business Development Agency (MBDA) – Tacoma Business Center	Linda Womack	lwomack@cityoftacoma.org	www.nibda.gov/businesscenters/tacoma
• National Association of Minority Contractors (NAMC -WA)		info@namcnational.org	https://namcnational.org
• Procurement Technical Assistant Center (PTAC)		info@washingtonptac.org	https://washingtonptac.org

Slide Summary:

Diverse Business Outreach List for Public Agency and Contractor

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APPENDIX A Diverse Business Outreach Distribution List

Organization	Contact Name	email	website
<ul style="list-style-type: none">• USDOT Northwest Small Business Transportation Resource Centers (SBTRCs)	Lily Keefe	<ul style="list-style-type: none">• info@economicalliancesc.org• Gayvi@economicalliancesc.org• LilyK@economicalliancesc.org• aliciam@economicalliancesc.org	www.transportation.gov/osdbu/nw-sbtrc
<ul style="list-style-type: none">• Urban League Metropolitan (Annual Breakfast)	Michelle Merriweather	<ul style="list-style-type: none">• mmmerriweather@urbanleague.org	https://urbanleague.org
<ul style="list-style-type: none">• Ethnic Chambers of Commerce Coalition (ECCC)	<ul style="list-style-type: none">• Skip Rowland	<ul style="list-style-type: none">• info@ethnicbusinesscoalition.org• info@waethnicchambers.org	<ul style="list-style-type: none">• www.waethnicchambers.org• http://ethnicbusinesscoalition.org/
<ul style="list-style-type: none">• Tabor 100		<ul style="list-style-type: none">• staff@tabor100.org	https://www.tabor100.org/

Slide Summary:

Diverse Business Outreach List for Public Agency and Contractor

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APPENDIX A Diverse Business Outreach Distribution List

Organization	Contact Name	email	website
• Casa Latina	Chris Megargee	chris@casa-latina.org	https://casa-latina.org
• Dominican Association of Washington State	John Rodriguez	john@dominicanwashingtonstate.org	www.dominicanwashingtonstate.org
• El Centro de la Raza	Estela Ortega, Mario Sanchez, Gloria Gutierrez	eortega@elcentrodelaraza.org , events@elcentrodelaraza.org	www.elcentrodelaraza.org
• Filipino Chamber of Commerce	Anthony Ogilvie	president@fccpnw.com , filipinochamber@gmail.com	www.fccpnw.com
• Office of Minority and Women Business Enterprise			https://omwbe.wa.gov
• WEBS			https://pr.webs-vendor.das.wa.gov/home.html

Slide Summary:

Diverse Business Outreach List for Public Agency and Contractor

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APPENDIX A Diverse Business Outreach Distribution List

Organization	Contact Name	email	website
• GSBA (Greater Seattle Business Association)	Louse Chernin	louise@thegsba.org	www.thegsba.org
• LELO (Legacy of Equity, leadership and Organizing)	Ricardo Ortega	ricardo@lelo.org	https://lelo.org
• Ventures	Amy Hollander	ahollander@venturesnonprofit.org	www.venturesnonprofit.org
• Ethiopian Community in Seattle - ECS		info@ecseattle.org	www.ecseattle.org
• TransitTalent			www.transittalent.com

Slide Summary:

Diverse Business Outreach List for Public Agency and Contractor