CAPITAL PROJECTS ADVISORY REVIEW BOARD
JOC Evaluation Committee

Pursuant to RCW 39.10.470, Public Bodies issuing Job Order Contracts

1. **Executive Summary**

   This SOP is to aid all parties involved in the data collection needed to meet the requirements within RCW 39.10.460.

2. **Definitions**

   a. Contract Number – The unique number assigned by the Public Agency associated with the JOC Contract.

   b. Award Date of JOC Contract – The date when the JOC contract was awarded to the contractor.

   c. Work Order Number - The unique number assigned by the Public Agency associated with a work order.

   d. Project Name - The name of the project associated to a work order.

   e. Notice to Proceed Date - the date issued by the Public Agency to the contractor to proceed with the work under the Work Order.

   f. Substantial Complete Date – means the Substantial Complete Date as described the individual JOC Contract and/or Work Orders between the Contractor and the Public Body. ***For the purposes of meeting the statutory requirement outlined in RCW 39.10.460 (1), a Work Order should be reported as "issued" when the Substantial Complete Date is within the fiscal year being reported.***

   g. OMWBE Certified - A business that is certified with the Washington State Office of Minority and Women's Business Enterprises.

   h. Agency Accepted Diverse - A business which the reporting public body has determined and accepted as diverse but is not OMWBE certified.

   i. Subcontractor/Vendor - Any person, other than JOC Contractor, who agrees to furnish or furnishes any supplies, materials, equipment, or services of any kind in connection with the Work Order.

   j. JOC Contractor Self Perform —Any Work performed directly by the JOC Contractor that does not include onsite supervision, overhead and profit.

   k. Total Contract Cost - means the fixed amount for the detailed specified general conditions work, the negotiated maximum allowable construction cost, and the percent fee on the negotiated maximum allowable construction cost.

   l. Subcontractor/Vendor Contract Value - the total costs of the work completed by all Subcontractors and/or Vendors.

   m. OMWBE Certified Utilization - means the ratio of the Subcontract/Vendor Contract Value performed by OWMBE Certified Subcontractors/Vendors divided by the Subcontractor/Vendor Contract Value expressed as a percentage.

   n. Agency Accepted Diverse Utilization - means the ratio of the Subcontract/Vendor Contract Value performed by Agency Accepted Diverse Subcontractors divided by the Subcontractor/Vendor Contract Value expressed as a percentage.

      o. <u>Percentage of JOC Contractor Self-perform</u> – means the ratio of the work which was self-performed by the JOC contractor divided by the total Subcontractor/Vendor Contract Value. Self-performed work cannot exceed 10% of the work contained in the job contract per RCW 39.10.440.

3. **Roles and Responsibilities**
   a. JOC Evaluation Committee
      i. Evaluate data received from DES
      ii. Support DES in acquiring JOC data from public agencies
      iii. Present the data to CPARB
   b. Department of Enterprise Services (DES)
      i. Develop and maintain reporting tool for data collection according to JOC Evaluation Committee criteria
      ii. Receive data from reporting public agencies
      iii. Provide raw data to JOC Subcommittee for analysis
      iv. Publish reporting due dates and data collection tools on DES website
      v. Request advertisement of due dates and location of data collection tool on behalf of CPARB JOC Subcommittee in legal publication
   c. Public Agencies using JOC contracts
      i. Provide data to DES. One form to be completed for each JOC Contract. Multiple forms will be required if the public agency has multiple contracts underway during the reporting period.
      ii. Coordinate with the JOC Contractor in supporting the data collect effort
   d. JOC Contractor
      i. Support the public agency collecting data
4. **Process**

During the *July* JOC Evaluation Committee Meeting,			
JOC Evaluation Committee	1.	Reviews	reviews the reporting document and SOP for any necessary updates.
During the **August** JOC Evaluation Committee Meeting,			
JOC Evaluation Committee	2.	Approves	Approves any changes.
	3.	Provides	list of changes to DES
DES JOC-CPARB Support	4.	Receives	list and retains for tracking purposes.
During the *September* JOC Evaluation Committee Meeting,			
JOC Evaluation Committee	5.	Complies	list known Public Agencies using JOC Contracts.
	6.	Provides	list to DES.
DES JOC-CPARB Support	7.	Receives	list and retains for tracking purposes.
Prior to *last Monday of September*,			
DES JOC-CPARB Support	8.	Requests	Publication of reporting deadline of November 30 in appropriate legal newspaper.
	9.	Publishes	Data collection tool and due date of report on DES website for previous fiscal year.

Public Agencies in collaboration with their JOC Contractors	10.	Complete	Report using data collection tool provided on DES website.
	11.	Review	Review and write a 50 word or less narrative explaining the reasoning on why the work orders that went over the total allowed contract amount, went over the total allowed amount of self-performance, and any other items that fall outside of the RCW.
	12.	Submits	Report to DES.
At *least one week prior to November* JOC Evaluation Committee Meeting,			
DES JOC-CPARB Support	13.	Provides	Committee chair responding Public Agencies raw data.
JOC Evaluation Committee Chair	14.	Receives	Data and distributes to committee for evaluation.
JOC Evaluation Committee	15.	Contacts	Public Agencies who have not completed reporting to request data.
December 31 is final deadline for Public Bodies to respond.			
At *least one week prior to January* JOC Evaluation Committee Meeting,			
DES JOC-CPARB Support	16.	Provides	Any additional data collected to JOC Evaluation Committee Chair.
JOC Evaluation Committee Chair	17.	Receives	Additional data and distributes to Committee for review.
	18.	Publishes	Compiles the raw data into a final report to present to CPARB.
During ***February*** CPRAB meeting,			
JOC Evaluation Committee	19.	Presents	Report and raw data to CPARB.
	20.	Provides	final report and all raw data to CPARB-PRC Administrative Support for publication and records retention.
CPARB-PRC Administrative Support	21.	Receives	Final report and raw data.
	22.	Publishes	Final report
	23.	Retains	Raw data according to public records retention schedule.

5. **Update Revision to the SOP**
   The SOP and reporting document will be reviewed annually. At this time the JOC Evaluation Committee will address any changes that have been requested from the CPARB Committee and any other changes the committee would like to have made.

6. **Additional procedure will be developed to complete reporting form.**