

## Job Order Contracting (JOC) Delivery Method Process:

### Phase 1 – Deciding whether or not JOC is the appropriate delivery method.

- Project leader(PL) discusses utilization of JOC as a delivery method with Contract Administration(CA).
- If utilization of the JOC delivery method is decided, the JOC project request form can be found at the following link - <https://wikispaces.psu.edu/download/attachments/357076612/MASTER-%20PSU%20-%20Project%20Request%20Form-JOC-%20PDF.pdf?version=1&modificationDate=1501698098000&api=v2>
- Completed request forms need to be emailed to Jesse Wells @ [jgw124@psu.edu](mailto:jgw124@psu.edu)
- As noted in the project request form, if there are anticipated sole-source items, formal sole-source approval will be needed. JOC Sole Source Justification Form can be found at the following link - <https://wikispaces.psu.edu/download/attachments/357076612/JOC%20Single-Sole%20Source%20Justification.pdf?version=1&modificationDate=1501698145000&api=v2>

### Phase 2 – Joint Scope/Pre-bid & Pricing Process

After JOC project request form is submitted, please follow the below instructions for the Joint Scope/Pre-Bid Meeting/pricing process.

- Once the PL has a priceable set of documents or scope, the next step in the JOC process is to hold a Joint Scope/Kickoff Meeting which is essentially a pre-bid meeting and roughly an hour in length. Please coordinate with your staff assistant to set this up. At this meeting, the PL can answer any questions regarding the project and go over administrative type topics (due dates for pricing, schedule, working hours, permits, utilities etc.). Also during the meeting, the price proposal review process is reviewed. The PL and professional(s) do a quantity check on all line items to make sure they are in-line with what was estimated. CA will review the means and methods component as well as the general condition related line items.
- If it hasn't already been done, it is recommended the second half of the meeting be designated for a project site visit with the contractor, design team, and any others who have input on the project to ensure contractor responsibilities are clear.
- Typically those in attendance at the Joint Scope Meeting are CA(Jesse Wells), PL, JOC Contractor, Vern Davis, Todd Webber, John Risley, Designer, End Users/Customers (if you want them to attend), and any others you feel are relevant to the project.
- **If the project involves design assist and the contractor has been heavily involved with the scope/schedule and have already started the pricing process, perhaps a meeting with just the PL, CA, John Risley, and the contractor is sufficient. This is the PL's call.**

The following link contains Joint Scope/Pre-Bid Meeting topics:

<https://wikispaces.psu.edu/download/attachments/357076612/Joint%20Scope%20Meeting%20Topics.pdf?version=2&modificationDate=1501698238000&api=v2>

### **Phase 3 – Proposal Review Process**

- After Joint Scope/Pre-Bid meeting is held, JOC contractor prices project utilizing the JOC Construction Task Catalog (CTC). Once pricing is complete, JOC contractor emails price proposal and associated documentation to both the PL and CA. JOC proposal package review instructions can be found at the following link:

<https://wikispaces.psu.edu/download/attachments/357076612/JOC%20Proposal%20Review%20Instructions.pdf?version=1&modificationDate=1501698206000&api=v2>

**It is extremely to follow all steps located in the proposal review instructions document!**

### **Phase 4 – Proposal Approval and Commitment Request in Tririga**

- Once proposal package completes the review process and any revisions have been made to proposal, PL must formally approve the entire proposal package and send to CA for contract execution. The steps/checklist in the following link outline this process:

<https://wikispaces.psu.edu/download/attachments/357076612/JOC%20Commitment%20Request%20Checklist.pdf?version=1&modificationDate=1501698266000&api=v2>

**Should you have any questions about anything related to the JOC program/processes, please see one of us in CA for help.**