

Bidding a JOC or SABER?

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CHECKLIST FOR BIDDING A JOC OR SABER OPPORTUNITY:

- ❑ Locate and track the opportunity at FBO.gov.
- ❑ List your firm as an interested vendor.
- ❑ Determine the requirements of the opportunity. Read the solicitation well, as it is important to have a good understanding of this or any opportunity. Remember when you win, you will have to live by your decision and what is in your proposal for up to five years. Here are some questions to consider:
 - What are your NAICS codes?
 - How long is the contract (3-5 years)?
 - Where will the work be performed?
 - What makes up the pricing?
 - How many coefficients are required to bid?
 - How many contracts will they award (1-5)?
 - What is the history for the past contracts and contractors?
 - Will they have funding?
 - Historically have they had funding?
 - What are your required mobilization and manning costs to win this contract?
- ❑ Put together your "A" team for the opportunity: operations, sales/business development, and marketing. You may consider partnering: Subcontractors, Joint Ventures, Mentor Protégé, or a Teaming Agreement.
- ❑ Ensure your business or your teaming arrangement meets solicitation requirements, business location, and restrictions (HUBZone, 8(a), woman-owned, small business subcontractors).
- ❑ Make sure you have the right software tools in place. Project management and estimating software are extremely important, but most solicitations require many more software titles.
- ❑ Assure you have the correct and most current RSMMeans cost data. There are several titles to choose from and some contracts require more than one title.
- ❑ Properly build out and create auditable line item estimates for the sample project. Estimates include line items, line item modifiers, notes, and takeoffs. Be sure to apply the appropriate local city cost index as per contract. A full and detailed understanding of the scope of work and specifications are essential for a successful proposal.
- ❑ Evaluate costs for mobilization, demobilization, and execution. The word execution is huge; what is the contract requirement for the size of your local team to execute the contract?
- ❑ Build your coefficients carefully. Take into account the weighting factors and predicted balance for each coefficient. Be aware of line items or sections excluded from Unit Price Books (UPBs). The items that are excluded from the price book may not be used in estimates. Therefore, these line items may need to be included in your coefficient. This is often the case for portions of Division 01 when using RSMMeans for the UPBs.
- ❑ Assemble your best past performance.



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- Consider your office staffing requirements.
- Consider any state tax obligation. This tax may be difficult to find, but it is required.
- Take advantage of asking and reviewing the questions and answers (Q&As). Be sure to read the FBO site often and check for addendums. All old and new contract information must be considered, including Q&As. Remember some RFPs have a drop dead date to ask questions. You want all your questions answered before you turn in your final proposal.
- Attend the Pre-Proposal Conference and Site Visit (for the Sample Project) if there is one; you can gain valuable information.
- Have others on your team review your proposal for content, grammar, and format.
- Review available files and bid packages (attachments, solicitations, amendments, etc.).
- Ensure you understand and meet every requirement of all sections, especially Section L, Proposal Preparation, and Section M, Evaluation Factors. This may maximize your score by covering every evaluation item.



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IMPORTANT ITEMS IN A GOOD BIDDING STRATEGY:

Pre-Proposal Conference or Site Visit: Do not miss the opportunity to attend the Pre-Proposal Conference or Site Visit. When you attend, ask questions, listen to others, and take notes. Site conditions and special access requirements commonly affect costs associated with federal construction. Going through the actual process of accessing the site can help clarify some of these requirements.

Request for Proposal (RFP): Carefully review all documents including the attachments, amendments, and modifications.

Specifications: Technical specifications are associated with the contract and actual task orders. The Owner may have a specific contract specifications book and/or rely on an "open" specifications book. It is important to review the specifications associated with the contract to mitigate any future issues and to assure cost estimates are as accurate as possible. Be careful to identify cost requirements that can be included with line items on individual delivery orders and those that need to be included in your coefficient.

Scope of Work: While it may be tempting to simply review the scope of work associated with an opportunity, winning bidders carefully review all documentation, walk the job, and get to know everything about the requirements.

General Conditions: Careful attention should be given to the General Conditions Sections. There may be costs associated with conforming to the conditions listed.

Instructions to Bidders: Important detailed information is included in these instructions, including but not limited to: format, page count, and associated timing requirements.

Davis Bacon Wage Rate: Review the Davis Bacon wage rates and how they align to the UPB, local rates, or "Street" wages.

Unit Pricing: Unit price line items, with associated material, equipment, and labor costs, are required and are used to enable transparency relative to the submitted estimate. They also enable the Owner and Contractor to better monitor any additions or deletions to specific projects or task orders. The process of applying these unit prices may vary from contract to contract, but details about how the unit prices are used should be available in the contract documents. Unit price estimates also enable the General Contractor to compare accuracy between Subcontractor quotes.

Special Conditions: Take note of any special conditions (security, remoteness, etc.) that may affect your working hours or productivity.

Questions: Any questions typically must be submitted in writing or at the Pre-Proposal Conference. Be aware of the calendar dates and ask questions before any associated deadlines.

Sample Estimate: Leverage all available experience, technology, and cost data to organize a detailed cost estimate in a professional format. An exclusive use of spreadsheets has been known to be a source of errors and presents collaboration and productivity issues and may not be allowed. Assure your estimate is broken down according to any categories or divisions as noted in the solicitation documents.

Final Review: Have team members review your proposal to assure that it is in compliance with bidding documents, forms, bid bonds, formats, etc.



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GLOSSARY:

Coefficient: Coefficients are factors multiplied against the standard unit prices in the Unit Price Guide to calculate task order prices. Contractors propose coefficients for costs such as overhead, profit, minimum design costs, G&A expenses, bond premiums, and gross receipt taxes.

Construction Specifications: Construction specifications, or construction specs for short, are documents that instruct Contractors what needs to be done at a construction site.

The Federal Acquisition Regulation (FAR): The FAR System governs the "acquisition process" by which the government purchases (acquires) goods and services.

FedBizOpps (FBO.gov): This site is designed as a single point of entry for federal buyers to publish contracts. Vendors can find posted federal business opportunities across departments and agencies.

Indefinite Delivery Indefinite Quantity (IDIQ): This is a type of contract that provides for an indefinite quantity of supplies or services during a fixed period of time.

JOB Order Contracting (JOC): A way for organizations to get numerous, commonly encountered construction projects done quickly and easily through multi-year contracts.

Nonpriced Item: Items that are not found in the UPG. Contractors are often required to submit three quotes for each nonpriced item.

Priced Cost Item: Items found in the UPG are called priced line items.

Request for Proposal (RFP): A solicitation made, often through a bidding process, by an agency or company interested in procurement of a commodity, service, or valuable asset, to potential suppliers to submit business proposals.

Simplified Acquisition of Base Engineer Requirements (SABER): Contracts include detailed task specifications that encompass most types of real property maintenance, repair, and construction work.

Unit Price Guide/Book (UPG/UPB): These are commercial pricing tools such as computer cost databases and libraries of hard copy books. Although rare, they might also include government-developed unit price books. UPGs list tasks by unit of measure and unit price. Because the prices are general, the team must tailor the UPG to a specific location. This step, called "localization," is critical to the success of a SABER Program.



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