SWC-90818
INDEFINITE QUANTITY CONSTRUCTION (EZIQC®) SERVICES

Statewide Contract Webinar

American Recovery and Reinvestment Act of 2009 (ARRA) Requirements

SPD-CP031b

Georgia State Purchasing Division
http://statepurchasing.doas.georgia.gov
Agenda

• SWC-90818 Background/Purpose
• Weatherproofing Technologies Inc. (WTI) – Brian Mosey
• The Gordian Group (TGG) – Ed Snow
  ▪ NJPA Contract Award
  ▪ SWC Contract Benefits
• Rules of Engagement
• Process Overview/Ordering Instructions
• American Recovery & Reinvestment Act (ARRA)
• Where to Find this Statewide Contract
• POC Information
• Questions
PURPOSE:
Indefinite quantity construction services contract to provide firm fixed priced, indefinite quantity, multi-traded general construction services to accomplish small to medium sized projects for repair, alteration, modernization, rehabilitation and minor new construction to infrastructure, buildings, structures, or other real property.

BACKGROUND:
• DOAS established a new statewide Indefinite Quantity Construction (EZIPC®) Services Contract through a strategic partnership with
  ▪ National Joint Powers Alliance® (NJPA) – National Municipal Contracting Agency
    ➢ Specializing in cost effective purchasing solutions achieved through the bundling and leveraging purchasing power of its national membership.
  ▪ Weatherproofing Technologies, Inc. (WTI) – General Contractor
    ➢ Competitively Awarded 2 Regional Contracts within the State (Northern GA & Southern GA)
  ▪ The Gordian Group (TGG) – Leading Consultant Firm in the IQCC/JOC Industry
    ➢ Provide Independent Scope of Work Development and Price Proposal Review Services to all EZIPC® Authorized Users
    ➢ Assists NJPA in Administering the EZIPC® Contracts

CONTRACT TERMS:
• Contract Awarded - October 15, 2009
• 1 Year Base Period with 4 (1) Year Renewal Options
General Contractor - Weatherproofing Technologies, Inc

Presenter: Brian Mosey

- EZIQC/IQCC Business Development Manager for the State of Georgia
- Joined Tremco/WTI in 2003
- Sales Manager for Blackmore & Buckner Roofing Division of General Roofing Inc.
- Ball State University - Business/Marketing/Economics- 1981

bmossey@tremcoinc.com
(317) 446-3024 (Mobile)
Weatherproofing Technologies Inc. (WTI)

- WTI is a subsidiary of TREMCO
- Parent Company - TREMCO in business since 1928
- WTI
  - Delivering Quality Services and Solutions since 1962
  - Large Presence throughout North America
  - Extensive Experience throughout State of GA for over 25 years
  - Experienced in all Divisions of Constructions
  - Locally based Staff
  - Utilize all Local Subcontractors

- Ready to Scope Work and Provide Price Proposals Immediately

Full Range of Construction Services
IQCC Consultant - The Gordian Group

Ed Snow
- The Gordian Group, Inc. (TGG)- Southeast Region Manager
- 15 years experience with Job Order Contracting
- Prior to that managed design/construction/development contracts with national A/E/C firm.

E.Snow@gordian-group.com
(800) 874-2291
The Gordian Group (TGG)

EZIQC is a Brand of IQCC Contracting established by TGG

- **TGG**
  - Helped establish the IQCC /JOC Concept in the Construction Industry
  - Leading Consulting Firm to Facility/Infrastructure Owners accomplishing work through the IQCC/JOC / EZIQC® Contracts
  - Helped Clients procure over $1.5 Billion in minor repair, maintenance, alterations, and minor new construction projects in North America each year
  - Professional EZIQC® Assistance
    - Assist in developing Detailed-Scope-of-Works
    - Assist in Price Proposal Reviews
NJPA Contract Award Details

• Competitively Bid

• Construction Task Catalog (CTC) is prepared for the Bid
  ▪ Prepared by The Gordian Group, Inc., the foremost authority on construction tasks costs for JOC/IQC contracts.
  ▪ Task prices are set at the time of Bid
    • Local Labor
    • Local Equipment
    • Local Material

• Bid is Adjustment to Catalog Prices
  ▪ For example- 1.10 bid is a ten percent increase to the prices
  ▪ For example-1.12 bid is a twelve percent increase to the prices

• The lowest responsive and responsible bidder was awarded the Contract
Construction Task Catalog (CTC)

- Unit Prices include locally Priced Labor, Material and Equipment

- Energy Conservation Measures (ECM) Type Tasks Included

- Web Links to the Contract Documents as well as the CTC can be found on the SWC Website:
  [http://ssl.doas.state.ga.us/PRSapp/PR_StateWide_Contract_Menu.jsp](http://ssl.doas.state.ga.us/PRSapp/PR_StateWide_Contract_Menu.jsp)
NJPA Contract Coverage & Pricing

- WTI holds an EZIQC contract in both regions

<table>
<thead>
<tr>
<th>NJPA Contract #/Region</th>
<th>Number of Active IQCC Contracts</th>
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<tr>
<td>GA01-111908 N GA</td>
<td>1</td>
</tr>
<tr>
<td>GA02-111908 S GA</td>
<td>1</td>
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</table>

<table>
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<th>Adjustment Factors</th>
<th>Normal Working Hours (7:00 AM-4:00 PM) Mon.- Fri.</th>
<th>Other Than Normal Working Hours (4:00 AM-7:00 AM) Sat., Sun. &amp; Holidays</th>
<th>Non Pre-priced Items</th>
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<tbody>
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<td>1.0603</td>
<td>1.1133</td>
<td>1.2000</td>
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<tr>
<td>GA02-111908 S GA</td>
<td>1.0765</td>
<td>1.1303</td>
<td>1.2000</td>
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</table>
NJPA Contract Service Details

• **Typical Project Size**
  - Typically between $2k-$750k
  - Average IQC project nationwide is $75k

• **Appropriate for all Types of Construction Projects**
  - Site Work/Utilities
  - Concrete
  - Masonry
  - Metals
  - Wood Plastics and Composites
  - Thermal and Moisture Protection
  - Door and Window Openings
  - Finishes
  - Specialties
  - Equipment
  - Furnishings
  - Conveying Equipment
  - Mechanical
  - Electrical
  - Communication
SWC Benefits

- On Call Construction Contractor
- Saves Significant Amount of Time
- Saves Money
- Reduces Change Orders and Related Costs
- Local Subcontractors
- Transparency
- Greater Schedule Flexibility
Benefit – Time Savings

Based on independent studies, JOC can save up to 90% in procurement time from project identification to completion.
Benefit – Cost Savings

- **Typical Cost Savings 8-15%**
  - **Construction Cost**
    - Overhead and profit spread over entire value of contract
    - Greater Maximum Value = Lower Adjustment Factor = Greater Savings
  - **Lower Procurement and Administrative Costs**
    - EZIQC Eliminates the need to use full procurement cycle for each and every project
  - **Fewer Change Orders and Claims**
    - Joint Scope process eliminates misunderstandings about scope
    - Contractor paid same price for changes in the scope of work (no negotiating change orders)
  - **Reduction of Architectural and Engineering Fees**
    - Currently many projects are “designed” primarily for procurement purposes
- **Cooperative Purchasing = Volume Discounts**
Benefit – Cost Savings

- Prevent Non-Competitive/Negotiated Change Orders
Benefit – Local Subcontractors

- Work to Marketplace Rapidly

- Increase Opportunities for:
  - Local businesses
  - Small businesses
  - Minority business enterprises
  - Women owned business enterprises
  - Disadvantaged business enterprises

- Responsiveness = Local Subcontractors

- “Open” Request for Qualified Contractors posted to GPR
  - Provides instructions for local contractors to register for subcontract opportunities

- Construction Contractors can register at [www.egordian.com](http://www.egordian.com) and receive emails concerning opportunities

- Customer “review and approval “of Subs prior to Purchase Order
Benefit – Transparency

- See and Review Pricing Details
- EZIQC provides all the details

<table>
<thead>
<tr>
<th>Category</th>
<th>Paint Interior Plaster/Drywall, 1 Coat Primer, Brush/Roller Work</th>
<th>$2,097.13</th>
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<td>SF 09920 0052</td>
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<td></td>
<td>Installation Quantity 5,733.00 x $0.31 x 1.1800 =</td>
<td>$2,097.13</td>
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<table>
<thead>
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<th>For Quantities &gt; 5000 To 10000 (&gt; 464.5 m2 To 929.0 m2), Deduct</th>
<th>$-202.95</th>
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<tbody>
<tr>
<td>30</td>
<td>09MOD 0062 0350</td>
</tr>
<tr>
<td></td>
<td>Installation Quantity 5,733.00 x $-0.03 x 1.1800 =</td>
</tr>
</tbody>
</table>

| SF 09920 0064                                                 | $4,261.91 |
| Paint Interior Plaster/Drywall, 2 Coats Paint, Brush/Roller Work |          |
| Installation Quantity 5,733.00 x $0.63 x 1.1800 =             | $4,261.91 |
Benefit – Greater Schedule Flexibility

- Agency approves schedule before Purchase Order
- No shelf life for prices or Work Orders
- Time Delays are not Monetary Decisions
SWC Rules of Engagement

- MUST BE AN AUTHORIZED USER
  - BOR has unique Pre-Approval Process & Website

- Ordering Limitations
  - Contractor may decline Jobs under $2K
  - DOAS Approval required for
    - Individual jobs over $750K
    - A series of POs from same User within a 30 day period that combined together total more than $2M.
  - Maximum Order Limitations **DO NOT SUPERCEDE** any ordering limitations established by a User Agency/Entity

- Bonds and Insurance Certificate issued on Work Order by Work Order basis
- Bonding Requirements may be waived for Work Orders < $100K
PO Rules of Engagement

• PO should reference the following:
  ▪ SWC-90818
  ▪ Detailed Scope of Work
  ▪ Additional Terms & Conditions (if required)
    ❖ Special Insurance
    ❖ Federal Regulations (not included)

• Special Insurance Coverage addressed on Work Order by Work Order Basis
  ▪ Pollution Liability
  ▪ Hot Work CGL Limits
  ▪ Railroad Protective Liability

• Users may negotiate the inclusion of any unique contract terms and conditions specific to the Work Order with the Contractor

• PO should be issued only after:
  ▪ All required Bonds and Insurance Certificates have been received from the Contractor

• Submittals & Inspections follow the Standard Construction Process
  ▪ Certified Payroll Records will be submitted with the application for payment (as applicable)

• Construction Management is performed by the Authorized User or a Representative
  ▪ Construction Management and Inspection Services may be ordered through EZIQC
Process Overview/Ordering Instructions

- Go to [http://www.EZIQC.com](http://www.EZIQC.com),

- If you are part of the University System of GA and governed by the BOR, then go to [http://www.EZIQCR.com](http://www.EZIQCR.com)

- Authorized User should Enter Name, Contact Information and Project Description

- EZIQC Representative will contact User to schedule a Joint Scope Meeting.

- EZIQC Representative will help User prepare a Detailed Scope of Work.

- Once the Detailed Scope of Work is complete and approved, the EZIQC Rep will forward it to the Contractor.

- The Contractor will prepare a Price Proposal Package using the CTC for the appropriate region.

- The CTC prices will then be multiplied by the appropriate Adjustment Factor to determine the total price of the order.

- The completed Price Proposal Package will be reviewed by the EZIQC Rep.

- Once the Price Proposal Package has been satisfactorily validated by the EZIQC Rep, the package will be submitted to the Authorized User for final approval.

- If satisfied with the price and schedule, the Authorized User will issue a Purchase Order to the Contractor to complete the work.
American Recovery & Reinvestment Act of 2009 (ARRA)

- **ARRA** – Public Law 111-5, enacted February 17, 2009
  - Purpose is to Stimulate the Economy and Create and Retain Jobs

- **State Energy Program (SEP)** – Approved 135 ARRA Projects/Completion Date of 03/31/2012
  - 71 of 135 Projects (USG)
    - Georgia Environmental Facilities Authority (GEFA) received all ARRA Funding for State of Georgia
    - USG Facilities Office will Administer USG funded ARRA Projects (71)
    - All Projects funded by GEFA/ARRA for State facilities (Agencies or Units of University System)
      - Recipients must receive PRIOR APPROVAL to use the EZIQC Contract (Project Management Team)
      - Project Management Teams consists of both GSFIC and USG

- **DOE** - Direct Allocations of ARRA funding (EECBG) to Georgia Cities, Counties & GEFA
  - 18 Cities - > 35,000 population
  - 10 Counties - > 200,000 population
  - Report directly to DOE

- **GEFA Currently Working on Procedures/Application for Smaller Cities and Counties to receive ARRA Funding**
  - Cities < 35,000 population
  - Counties < 200,000 population
ARRA Projects and SWC 90818 - EZIQC

- **ARRA Implementation Guidance states:**
  Updated Implementing Guidance for the American Recovery and Reinvestment Act of 2009, issued by the Executive Office of the President; Office of Management and Budgets - Dated April 3, 2009

  - **Section 6, Paragraph 6.1 Competition**
    - Existing Fixed-price contracts that were competitively awarded may be used to obligate funds expeditiously

  - **Section 6, Paragraph 6.1 Existing Contracts**
    - If Agencies obligate funds provided under the Recovery Act on an existing order or contract, including but not limited to a GWAC, multi-agency contract, GSA Federal Supply Schedule contract, or agency indefinite-delivery/indefinite quantity (IDIQ) contract, they must be reported as “Recovery” actions per Section 6.2.

  - **Section 6, Paragraph 6.2 Posting of Notice/Summary**
    - Notice provided for Information purposes only

- **Appropriate ARRA Projects for SWC 90818 - EZIQC**
  - Lighting Upgrades and Sensors
  - Reroofing
  - Windows & Door Replacement
  - Chiller & Boiler Replacement
  - HVAC Replacement

- **Non Appropriate ARRA Projects**
  - Project types involving Design, Professional Services and Unique Construction
  - Bldg Commissioning and Decommissioning
  - Solar and Wind Projects
  - Unique Controls and Building Automation

- **EZIQC Currently Working on 2 ARRA Projects**
  - Approved by GEFA & GSFIC
  - Project Types – Roofing & Lighting
  - State Agencies will be required to Post Notice on GPR for **ALL** EZIQC ARRA Projects
    - Directions provided in Ordering Instructions
SWC 90818 – EZIQC Modified to Incorporate ARRA Requirements

- Buy American Provisions (Exceptions)
- Dun & Bradstreet
- Central Contractor Registration
- Copeland “Anti-Kickback” Act
- Copeland “Anti-Kickback Act (Wage Reporting)
- Davis-Bacon Wage Act
- Subcontracting Requirements
- Neutrality – Open Competition
- IG/DOE Audits
- Field Audits
- Reporting Requirements
  - Measurement & Verification (M&V)
Reporting Requirements - M&V Methods

- M&V Required on Each Project in accordance with M&V Plan

- Exact Method of M&V for each Project shall be determined by the State using guidelines of International Performance Measurement and Verification Protocol (IPMVP)
  - Option A - Retrofit Isolation with Key Parameter Measurement
  - Option B - Retrofit Isolation with all Parameter Measurement
  - Option C - Whole Bldg Utility Data Analysis
  - Option D – Calibrated Computer Simulation

- ECMs with Projected Annual Savings < $10,000 per year can use Engineering Calculations instead of an official IPMVP method.

- Lighting Projects -Typically Option A or B

- Medium and Large Controls (excl. metering) & Mechanical Projects (within a single building or central plant) - Option B (where practicable)

- Metering, Commissioning, Building Envelope, and Multi-building Controls Projects - Option C (10% rule)

- Required M&V Data and Technical Information may be manufacturer-provided specifications, data, engineering calculations, measurement via metering or other methods /sources
Impact of Energy Efficiency Measures

- Baseline Power
- Post Retrofit Power

Current Total Energy Consumption

Operating Hours

Post Retrofit Hours

Baseline Hours

POWER REDUCTION

HOURS REDUCTION
Reporting Requirements - M&V Plan

- All M&V Plans must be approved by GEFA
- All M&V Plans must include:
  - Description of the ECM & Intended Results
  - M&V Option (A, B or C) to be Used
  - How Baseline Data will be Determined
    - Parameters to be measured (also, when and for how long),
    - Parameters to be stipulated (agreed to, held constant)
    - How & why the baseline may be adjusted (weather, occupancy, etc.)
  - Measurement Methods & Equipment to be Used
  - Schedule for All M&V Activities (Baseline, Construction, Post-retrofit, Report)
  - Who will Conduct the M&V Activities (self-perform – all or some?)
  - Energy Savings Report - Methods, Assumptions, Calculations & Results of M&V
  - Costs of M&V Operations and Equipment
SWC 90818 – EZIQC and ARRA Reporting Requirements

State Agencies

• Contractor will assist with gathering, producing or creating data and technical information for reporting to GEFA and the Federal Government
  ▪ OMB -1512 Reporting
  ▪ DOE – Attachment 2 Reporting
  ▪ GEFA Reporting

• Contractor Specific Reporting Responsibilities will be outlined in the Detailed Scope of Work applicable to each Work Order
  ▪ Reporting/M&V responsibilities will be unique for each Work Order
  ▪ State Entities must submit M&V Plan for their ARRA Projects to GEFA prior to issuing a Purchase Order
  ▪ Detailed Scope of Works will be modified to incorporate any revisions to the M&V Plan by GEFA with respect to Contractor responsibilities and cost
  ▪ Price Proposals will be modified accordingly
Cities /Counties

- Contractor will assist with gathering, producing or creating data and technical information for reporting to Federal Government
  - DOAS is currently working with DOE for Contractor Specific Reporting Responsibilities
    - OMB 1512
    - Page Report
    - 904 Standard Form
- DOE Point of Contacts – Kay Brown/Amanda Newport
  - Purchasing Office
  - Oak Ridge, TN
  - James Damm
  - Purchasing Office
  - Denver, Colorado
Where to Find this Statewide Contract

The contract is available for use through the State Purchasing Statewide Contract Index Listing under **Indefinite Quantity Construction (EZIQC®) Services**

Here is the link to the Contract Index Link:
http://ssl.doas.state.ga.us/PRSapp/PR_StateWide_contract_menu.jsp
1. Visit the DOAS website at www.doas.ga.gov
Where to Find this SWC

2. Hover over the “State and Local” section
3. Click on “State Purchasing”
Where to Find this SWC

4. In the “Direct Links” section, click on “Statewide Contracts”
Where to Find this SWC

Statewide Contract Index

200 Piedmont Avenue, SE, Suite 1308 West Tower
Atlanta, Georgia 30334-9010
Phone: 404-657-6000
Fax: 404-657-8444

STATEWIDE CONTRACTS

State Purchasing establishes competitive statewide contracts for a wide variety of products, services, and equipment. These contracts cover commonly used commodities such as office furniture, motor vehicles, natural gas, liquid petroleum, paint, ammunition, asphalt, and much more. In order to find the contract that best fits your needs, use the following menu of search options.

If you have questions pertaining to a specific contract, please contact the State Purchasing Buyer identified in the contract information, or contact the State Purchasing office at 404-657-6000.

MENU

Choose one of the methods below to access Statewide Contracts

- list of Statewide Contracts (Alpha order)
- list of 5 Digit NIGP codes assigned to Statewide Contracts
- Search for Statewide Contracts by keyword
- Search for Statewide Contracts by Major NIGP Category

RETURN

Select a method to view the List of Contracts.
For More Information

If you have questions about this Statewide Contract:

Submit Questions to:

Wanda George
wanda.george@doas.ga.gov
404-651-9291

Vendor Contact Information:

Charles (Gene) Moss, Jr. - WTI
800-852-9689 Ext.3233
Mobile: (678) 395-1111
Email: cmoss@tremcoinc.com

Brian Mosey-WTI Customer Rep
317-446-3024 cell
bmossey@tremcoinc.com

Billy Brooks-WTI Customer Rep
704-502-1044 cell
bbrooks@tremcoinc.com

Ed Snow -The Gordion Group
Eziqc Customer Rep
esnow@gordian-group.com
1-800-874-2291

This webinar:

A copy of this webinar will be posted on the SPD website on the Statewide Contracts page
State of GA ARRA Contact Information

GEFA Reporting
   • Andrew Ladd: aladd@gefa.ga.gov

GEFA Measurement & Verification
   • P.J. Newcomb: pjnewcomb@gefa.ga.gov

GSFIC Project Management
   • Danny Elijah: daniel.elijah@gsfic.ga.gov
   • Nathan Jones: nathan.jones@gsfic.ga.gov

GSFIC Procurement
   • Rey Palma: rey.palma@gsfic.ga.gov
   • Jim Hyde: jim.hyde@gsfic.ga.gov

USG Project Management
   • Greg Adams: greg.adams@usg.edu
   • Wayne Schweitzer: wayne.schweitzer@usg.edu
Questions?