University of California

JOC Schedule of Values Review Training

October 13, 2017
Schedule of Values Review

Proposal Review Summary - CSI

Date: August 14, 2014
Work Order #: UC81-023-0
Title: Mono B power and data install
Contractor: July 2014 - VC - Monobank Services
Proposal Value: $4,633.87
Proposal Review: Mono B Products and Data Upgrade
Proposal Submitted: 9/11/2014

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Factor</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>WR 620V 3/4&quot;</td>
<td>$0.98</td>
<td>12.00</td>
<td>1.0000</td>
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</tr>
<tr>
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Schedule for 51 - General Requirements

Subtotal for 51 - General Requirements: $87.52

Schedule for 50 - Metals

Subtotal for 50 - Metals: $169.39

Schedule for 57 - Thermal & Moisture Protection

Subtotal for 57 - Thermal & Moisture Protection: $58.43

Proposal Review Detail - CSI

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Proposal Review Summary - CSI

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Gordian®
### Schedule of Values Review - CTC

<table>
<thead>
<tr>
<th>CSI MasterFormat</th>
<th>Full description of task</th>
<th>Price inclueds labor, material + equipment for your location</th>
<th>Demolition price</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>32 16</strong> Curbs, Gutters, Sidewalks, And Driveways (32 10)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>32 16 13</strong> Curbs And Gutters</td>
<td>Note: Includes transition. Demolition includes saw cuts (each end) of curbs and gutters for lengths up to 100'. See CSI section 02 41 19 13-0043 for additional saw cuts within the 100'.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>32 16 13 13</strong> Cast-In-Place Concrete Curbs And Gutters (32 16)</td>
<td>Note: Includes concrete, forms, rebar, chairs (where necessary), expansion joint.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>32 16 13 13-0001</strong> Concrete Curb, Cast In Place</td>
<td>Note: Includes delivered concrete, forms, rebar, chairs (where necessary), expansion joints, finish and curbing.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>32 16 13 13-0002</strong> LF 6&quot; X 12&quot; Cast In Place Concrete Curb</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For Up To 20, Add</td>
<td>4.03</td>
<td></td>
<td></td>
</tr>
<tr>
<td>For &gt;20 To 50, Add</td>
<td>2.27</td>
<td></td>
<td></td>
</tr>
<tr>
<td>For &gt;50 To 100, Add</td>
<td>0.88</td>
<td></td>
<td></td>
</tr>
<tr>
<td>For &gt;100, Deduct</td>
<td>-1.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>32 16 13 13-0003</strong> LF 6&quot; X 12&quot; Cast In Place Concrete Curb - Radius</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For Up To 20, Add</td>
<td>4.63</td>
<td></td>
<td></td>
</tr>
<tr>
<td>For &gt;20 To 50, Add</td>
<td>2.61</td>
<td></td>
<td></td>
</tr>
<tr>
<td>For &gt;50 To 100, Add</td>
<td>1.01</td>
<td></td>
<td></td>
</tr>
<tr>
<td>For &gt;100, Deduct</td>
<td>-1.72</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Unit prices in the CTC include:

- **Labor** –
  - Straight time prevailing wages through a working foreperson and includes fringe benefits.
  - Unloading and transporting up or down 2 1/2 stories and 125' to reach the project site; layout; measuring and cutting to fit; performing the task; disposal of excess material; and time for lunch and breaks.

- **Equipment** –
  - Include all equipment required to accomplish the task.
  - Mobilization is included for all equipment except large equipment
  - Include all operating expenses such as fuel, electricity, lubricants, etc.

- **Material** –
  - Include the cost of the material delivery, and all incidentals and accessories integral to the installation.
  - Include an allowance for waste (drywall, carpet, ceiling tile, etc)
  - Imported materials (e.g. aggregate, sand, soil, etc.) include delivery up to 15 miles from the closest approved source.
Using the Construction Task Catalog

- The Contractor’s Adjustment Factors include:
  - **Business Costs** -
    - Office overhead
    - Insurance and bonding
    - Profit
    - Job Order development services
    - Subcontractor's overhead and profit
    - Cost of financing the work
  - Business risks such as:
    - Risk of a lower than expected volume of work
    - Smaller than anticipated Job Orders
    - Poor Subcontractor performance
    - Inflation or material cost fluctuations
Using the Construction Task Catalog

• The Contractor’s Adjustment Factors include:
  
  • **Project Related Costs** -
    • Project trailer, equipment and supplies, and portable toilets for Contractor’s use
    • Project management and project supervision
    • Services required to complete project filings and obtain permits
    • Preparation and modification of sketches, drawings, submittals, etc
    • Incidental engineering and architectural services
    • Gang boxes and storage containers for Contractor's use
    • Basic safety and warning signage, minor barricades and personnel safety equipment
    • Meeting Owner’s security requirements
Using the Construction Task Catalog

• The Contractor’s Adjustment Factors include:

  • **Project Related Costs** -
    • All taxes for which a waiver is not available
    • Sealing windows doors, and other openings with plastic to contain construction dust and debris within the work area.
    • Working in extreme temperatures
    • Daily clean-up & Final professional clean-up

  • **Price Variations** –

  • **Summary of Adjustment Factor Items** –
    • The only compensation to be paid to the Contractor
      
      Unit Price  x  Quantity  x  Adjustment Factor
    • All costs in excess of the unit price is included in the Adjustment Factor
Using the Construction Task Catalog®

• General Rules in the Construction Task Catalog®
  • Unit prices are for complete and in-place Construction
  • If the Contractor uses a crane or other lifting equipment the contractor will be paid for such crane or lifting equipment as a separate task
  • Unit prices include all fasteners required. Fasteners listed separately in the CTC are for use with Owner furnished material and equipment or relocating or reinstalling existing material and equipment
  • Unit prices exclude more substantial mounting material such as threaded rod or angle iron unless the task description states otherwise
  • Unit prices include sealant and caulking
  • Unit prices include testing, calibrating, balancing, start-up services and the like required to ensure proper installation
  • For the purpose of calculating the quantity of a task quantities are calculated on a per project basis.
  • Whenever there are alternative tasks that may be selected to complete work, the Contractor shall select the most practical and economical tasks available
Using the Construction Task Catalog®

• General Rules in the Construction Task Catalog®
  • Demolition -
    • Unit prices for demolition include all labor, equipment and material required for the complete removal of the items; clean-up of the area; and transporting the demolished items into a truck, dumpster, etc.
    • Unit prices for demolition exclude costs for hauling, dump fees, dumpsters, trash chutes.
    • If the item being demolished is attached to another item being removed and can be removed as one item, then that item shall not be priced as a separate demolition task, unless the component alone must be demolished to accomplish the task.
  • Working Height –
    • Typical working height for work other than masonry (4’) is up to 14' above the finished floor or stationary working surface. The Contractor will not be paid for scaffolding, lifts, or similar equipment for work below 14'.
Using the Construction Task Catalog®

- General Rules in the Construction Task Catalog®
  - **Assemblies** -
    - Assembly tasks take precedence over individual component Tasks
  - **Restricted and Confined Space** –
    - Restricted Working Space is defined as any area with less than 3' vertical or horizontal clearance and includes areas such as crawl spaces, ceiling plenums where the grid is not removed, narrow piping tunnels, and equipment rooms where the space to install the new work is congested as a result of equipment and piping placement that meet these dimensional restrictions.
  - **Or Equals** –
    - Whenever material, products, or equipment is identified in the CTC, or in the Technical Specifications, by reference to a manufacturer’s name, make or model number, the identification is intended to establish a standard.
Schedule of Values Review

Schedule of Values consist of 4 main components:

- Construction Task – Prepriced and Non-Prepriced (no more than 10% total)
- Quantity – tied to a unit of measure
- Unit Price (labor, equipment and material complete-in-place)
- Adjustment Factor

- Unit Prices and Adjustment Factors are set at time of bid
- Review should focus on Construction Tasks and Quantities
Schedule of Values Review

• Prepriced Task Considerations:
  • Required to complete scope of work?
  • Most appropriate task in the CTC for the item of work?
  • Part of another task?
  • Quantity correct?
  • Have Modifiers been used accurately?
  • Adjustment Factor selected is accurate?

• Non-Prepriced Task Considerations:
  • Required to complete scope of work?
  • Included in the CTC already as a prepriced task?
  • Has the correct percentage/factor been applied to the NPP task?
  • Did contractor provide all documentation to justify cost
    • Three independent quotes for material and/or subcontractor
    • In-house labor hour quantification and justification
Questions, Comments, Discussion?