

JOC PROGRAM ROADMAP

* PROCESS TIMELINE

The generic steps to starting a job order contracting program are listed below. This is a general framework. Center for JOC Excellence can connect you to resources. Contact the non-profit education and resource center at JOCexcellence.org for complete detailed information.



NEEDS ASSESSMENT & PLANNING

- Identify your organization's needs and determine if JOC is a suitable project delivery method. Assess the types of projects that could be included in the program.
- Review your facilities condition assessment.
- Develop a clear understanding of the scope, budget, and objectives of the JOC program.
- Designate a program champion & establish an internal team responsible for managing and overseeing the program implementation.

LEGAL CONSIDERATIONS

- Consult legal experts to ensure that the JOC program aligns with local regulations, your institution, and format is approved by legal – which departments will utilize the master JOC contract, etc.
- Develop or edit standardized contract templates and documents for use in the program, including the Master Job Order Contract and individual job/task orders.

UTILIZE BEST VALUE PROCUREMENT

- Why? You are procuring services not commodities.
- Ensures the values and needs of your Agency are stated.
- Quality & performance based selection methodology yields successful programs.
- JOC is a program not a project and its not a low-bid solution.
- Select CJPs: Just as DBIA is preferred for Design Build, PE for engineers, a CJP is preferred on the JOC team to provide qualified leadership.
- Perform contractor outreach plan & procurement processes.
- Award the appropriate number of contractors for the anticipated annual volume.

COMMUNICATION & TRANSPARENCY

- Foster clear communication between your organization, the JOC contractor, and stakeholders. Effective communication prevents misunderstandings and delays.
- Implement a system for regular progress reporting and updates on task orders and project status.
- CJE recommends monthly team updates.
- Ensure proper contract administration, including proper documentation, change management, and dispute resolution procedures.

1

2

3

4

5

6

7

8

DETERMINE STRUCTURE

Options include:

- Self-administer JOC program or
- Outsource management to third party or
- Hire a PM consultant to help structure or run a program or
- Utilize a cooperative for low volume or non-program work as a contract vehicle or
- A variation or combination of the above - ask CJE for resources and references for "like entities" and the Owners' Advisory Council.

SELECTING THE UNIT PRICE BOOK & SOFTWARE

- Select & specify an existing comprehensive Unit Price Book(s) that include detailed cost breakdowns for various construction tasks using CSI MasterFormat or
- Create your own price list from project data or
- Hire a consultant to create a customized UPB or
- Publish a RFP/Q for a UPB & data formatted for use in a JOC program.
- Ask your PMs which management software and cost data they prefer as part of your research.

Note: Ask CJE for the current list of providers so you can research and analyze options.

PROCEDURES AND WORKFLOWS

- Develop standardized procedures and workflows for initiating, reviewing, approving, and executing job orders.
- Train your project management and procurement teams on the JOC process, including contract administration, job/task order issuance, and contractor management.
- Document procedure for value engineering - it's a benefit of JOC programs.
- Ensure that all stakeholders understand their roles and responsibilities within the JOC program.

CONTINUOUS IMPROVEMENT

- Establish & publish key performance indicators (KPIs) to assess the contractor's performance, quality of work, timeliness, and adherence to budgets.
- Periodically assess the effectiveness of the JOC program and identify opportunities for optimization and refinement.
- Solicit feedback from all stakeholders, including internal teams and the JOC contractor, to drive continuous improvement.

***This roadmap is intended as a framework to help guide start-up efforts and not specific to any one entity or any legal specifications. Please integrate your processes to customize and complete the map.**