



Job Order Contracting

There are only a few types of Project Delivery Methods but none with as such an impressive performance record as Job Order Contracting (JOC).

JOB ORDER CONTRACTING

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JOB ORDER CONTRACTING

There are only a few types of Project Delivery Methods but none with as such an impressive performance record as Job Order Contracting (JOC) — including percentage of projects on budget or on time, or achieving the highest customer satisfaction levels.

That may be one reason why JOC has been used the U.S. Department of Defense for more than 30 years.

The information in just a few short chapters shows how JOC ensures quality work, helps small businesses grow and controls project costs by using alternative procurement methods.

For example, the Arizona Department of Administration learned how to control its costs using JOC and worked with a local contractor to save taxpayers more than \$600,000 compared to earlier bids. The Sumter County (Georgia) Parks and Recreation Department learned how a strong relationship with a contractor results in quality work. And, Los Angeles County has awarded nearly \$665 million in construction to certified small businesses in the last decade under its JOC program.

In three additional chapters, you will find information on the importance of finding a good ally in your procurement-supplier-end use relationships, the evolution of cooperative purchasing and examples of how local and state governments have benefited from smart contracting, including JOC. ●



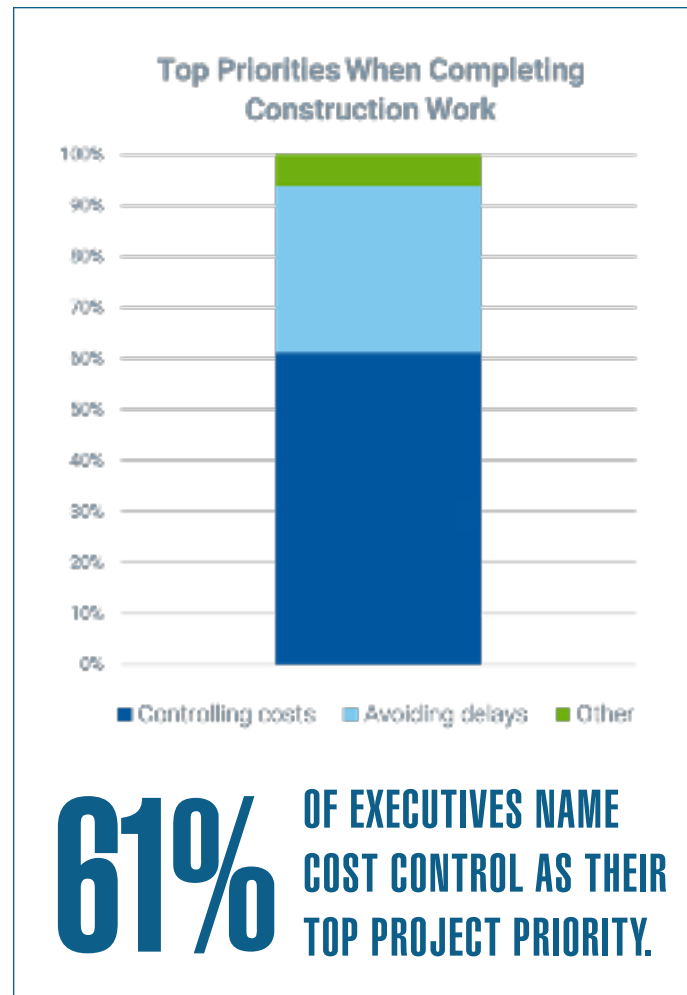
NO SURPRISES:

Using Alternative Procurement to Control Project Costs

If there is one thing facility executives want during a construction project, it's cost control. In fact, in a survey conducted by Gordian, over 60 percent of facility leaders say that cost control is their top priority when completing construction work. Unfortunately, the traditional construction procurement process leaves owners with little cost control. Overruns happen for many different reasons. Sometimes contractors use out-of-date cost data or wage information based on national averages, not local realities. Other times, the Scope of Work is unclear, resulting in change orders the owner is unprepared for. Similarly, there are occasions during a job where new issues are discovered and must be addressed. This causes delays and change orders. These circumstances combine to create cost uncertainty for project owners. But there is something they can do immediately to confront that uncertainty.

LOCAL PRICING, FIXED FROM THE START

Changing procurement methods can result in greater cost control. Take, for example, [Job Order Contracting](#), often referred to as JOC. JOC contracts are competitively awarded and allow schools, city and county governments and other public agencies to complete multiple projects with one contract. Gordian JOC projects are completed using a Construction Task Catalog® (CTC), a collection of more than 275,000 construction work tasks and associated preset unit prices. These prices are not national averages. They are localized labor, material and equipment costs created specifically for the project and owner and verified by a team of Gordian experts.



This is procurement-worthy data, the type of data used for a contract, not the type used for an estimate.

The CTC contains a set of technical specifications for each of the construction tasks and general conditions that contain the contract language concerning its execution. For each unit cost, either contractors apply an adjustment factor or owners adjust the volume of the task or material needed. Pricing—unit costs plus adjustment factor—never changes even if the scope does. Such certainty is a great benefit to project owners.

RELIEF FROM CHANGE ORDER NEGOTIATIONS

Changing project scope can be a big headache for project owners and contractors alike. The structure of a JOC program relieves this pain and eliminates the need for change order cost negotiations. Florence Kabwasa-Green, Project Manager for Monterey County's (CA) Resource Management Agency, put it this way: "If we do come across an unforeseen item in our projects, we're able to use the task catalog to have an estimate of how much it's going to cost. There are no surprises."

This is a winning scenario for the project owner and the contractor alike. The owner is assured an accurate price for each element of a project's Scope of Work and contractors are assured a steady flow of work. Since there is no need for either side to negotiate, there are no delays. No time is wasted, and projects stay on track. The mutual benefits go a long way to creating a collaborative partnership between both parties- and that partnership pays dividends.

An important part of any project delivered using Gordian's JOC solution is the Joint Scope Walk. This is a meeting between the project owner, the contractor and a Gordian representative on the job site to discuss the work to be done. All parties are free to ask questions and share information. Often, the contractor identifies problems that had not occurred to the project owner or suggests cost-saving solutions that help maximize project budget. This initial meeting eliminates misunderstandings, resulting in a more accurate price

ALMOST **57%**
OF EXECUTIVES ANTICIPATE REDUCED OR FLAT
YOY FUNDING FOR CONSTRUCTION

proposal. The Arizona Department of Administration (ADOA) discovered this benefit of JOC first hand when it wanted to replace a historic roof.

CASE STUDY: ARIZONA DOA SAVES \$600,000 WITH JOB ORDER CONTRACTING

The Carnegie Library in Phoenix was originally built in 1908 and has been a mainstay in the city ever since. When the state wanted to renovate the roof, one of its conditions was to mimic the original design. Paying homage to history was

costly and initial bids came in at \$1.3 million—nearly double the budgeted funding.

The Arizona Department of Administration (ADOA) accessed its JOC program through Gordian and worked with a local contractor to save taxpayers more than \$600,000 compared to earlier bids. The landmark's integrity was maintained and today, the building serves the community as a multi-use facility which includes an exhibit of its

own history. Had ADOA used traditional procurement, they either would have had to compromise on the roof's design or take funding from another project. JOC saved them from either of these unenviable choices.

CONCLUSION: USING PROCUREMENT TO DO MORE WITH LESS

The desire for cost control is being intensified by shrinking financial resources. Facility executives, particularly those in the public sector, are suffering from stagnant or reduced budgets. The Gordian survey found that nearly 57 percent of respondents flat or reduced construction funding compared to last year. The same group who prioritizes cost control has to do more with less money. Given these intersecting realities, decision-makers who desire to keep costs down and leverage contractor relationships into long-term, value-creating partnerships may consider alternative procurement methods like Gordian's Job Order Contracting. ●



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JOB WELL DONE:

How JOC Ensures Quality Work

There's nothing more frustrating than money ill spent. This is particularly true for government agencies who are trusted to, among other things, be good stewards of taxpayer money. Public trust quickly erodes when an entity's use of tax dollars results in a sub-par construction project or, worse yet, the entity must spend more on a project because the original workmanship was shoddy. That's a bad look at any level of government.

However, that situation is entirely avoidable if the contractor and the project owner see themselves as equal partners, teammates depending on one another to be successful. But that's easier said than done. A natural tension exists between project owners and contractors. One is paying another to do a job at specific standards and on a specific timeline while the other is trying to deliver high-quality work on that job and likely several others as well. It's easy for that tension to devolve into acrimony.

The truth is, contractors and project owners are in a relationship and like any relationship, it takes effort on both sides to make it work. Job Order Contracting (JOC) can help build and maintain a healthy partnership between owners and contractors by providing the right incentives.



JOC CONTRACTS: INCENTIVES INCLUDED

The term of a Job Order Contract is set for a specified period of time, typically one year, with included renewal options. The dollar value of the contract is expressed as a range, from a minimum dollar value of work to a maximum or estimated annual dollar value based on the owner's anticipated volume of work. The dollar range might be \$25,000 to \$100,000 or \$0 to \$1 million: It all depends on the need of the owner.

While a JOC contract is assembled with the owner's needs in mind, it benefits contractors, too. Knowing the dollar value range keeps contractors engaged—it is a literal and transparent marker of potential revenue. And an engaged contractor is likely to perform better work. This creates a cycle of mutual benefits.

Contractors understand the full potential of an agency's JOC contract, so they have extra incentive to deliver a high-quality product. Having received excellent work the first time around, the project owner feels comfortable selecting the same contractor for the next project. It's a perfect relationship where each side is equally motivated to reach the same ends.

Francis Hoar, Administrative Director for the Miami-Dade County Public Schools, puts it this way. "JOC helps facilitate these relationships [with contractors]. When they understand our needs, we understand the operational issues involved. Then we add knowledgeable and professional project managers. It makes for a winning combination. Everyone is invested and incentivized to perform at their best."

When everyone performs at their best, long-term relationships naturally blossom. People get on the same page and communication between all parties becomes more efficient. The contractor grows more familiar with the owner's needs and as long as expectations are met, the contractor enjoys a steady flow of work. It is in the best interest of both owners and contractors to make the partnership work well so that both parties want to extend the contract beyond the initial term.

CASE STUDY: CITIZENS REQUEST SAFETY MEASURES, COUNTY RESPONDS

The Sumter County (Georgia) Parks and Recreation Department learned firsthand how a strong relationship with a contractor results in quality work. The department had developed improvement plans for Boone Park they were sure would make the community



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happy. Contractor [FH Paschen](#) was scheduled to install two new basketball courts and a picnic pavilion, repave the running track and make other improvements. The county thought the public would be thrilled, so when over 50 residents attended the public forum to oppose the renovations, officials were taken by surprise.

It's not that local residents weren't appreciative of the improvements to the park, but they had different priorities including new restrooms and security cameras and lighting to make the park safer. The county was disappointed in the community's reaction but wanted to serve its residents, so officials asked FH Paschen to quickly redesign the nearly \$250,000 project. The contractor had a price proposal and a rendering of the project redesign within two weeks. They could not have turned this proposal around so quickly without Gordian's [ezIQC® solution](#).

ezIQC is a JOC contract used by multiple agencies that can be accessed through cooperative purchasing networks or other public entities. The



Sumter County Parks and Recreation Department accessed ezIQC through a statewide contract held by the [Georgia Department of Administrative Services](#). Buying construction services this way allows for public agencies to save money through volume discounts. Often, as in the case of Sumter County, the ezIQC process saves time as well because the JOC program is already up and running. There is less administrative work to do. This speed is advantageous to owners as well. According to a Gordian survey, more than 32 percent of facility leaders say avoiding delays is their second-highest priority during a construction project.

The community embraced the new direction for Boone Park and work began June 9, 2017. By mid-November, residents had the park for which they advocated. FH Paschen

built a new restroom facility with an ADA-compliant ramp to a playground. They cleaned, sealed and striped the walking track and installed new sidewalks. The community made it clear they wanted to improve safety at the park, so new security cameras and lighting were installed. The park still received the originally-planned picnic pavilion, along with a new dumpster enclosure and a new sign. After completing the successful project, despite a changing scope, FH Paschen was asked to do more work for the Department through ezIQC.

CONCLUSION: BETTER RELATIONSHIPS, BETTER WORK

A Job Order Contract has built-in incentives for contractors to do their best work. Knowing the value of a JOC program gives contractors plenty of motivation to perform their best for each project. ●



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HELPING SMALL BUSINESSES GROW, ONE JOB AT A TIME



< Ricky Haynes

To ensure new contractors don't take on jobs they are unprepared for, Gordian offers tiered contracts, each with a dollar-figure cap. The bottom tier has a cap of \$2,500 and the top tier a cap of \$250,000. After each project, Gordian evaluates a contractor's performance and whether that contractor is ready to graduate to bigger jobs. Ricky's first JOC project,

Ricky Haynes is a nice guy. Spirited, sincere, unassuming. His affect is closer to a deacon's than a entrepreneur with a growing business. But his contracting company, Create One on Earth Builders, continues to expand.

So how is Ricky Haynes, unlikely entrepreneur, achieving all this success? Hard work, mostly. But some of his success is due to the Chicago Housing Authority's (CHA) innovative use of Job Order Contracting (JOC).

In 2017, the city agency issued more than \$80 million of construction work to improve living conditions for its 62,000 low-income residents. CHA operates a unique program under Section 3 of the Department of Housing and Urban Development (HUD). In exchange for funding, HUD wants CHA to help poor residents secure paths to self-sufficiency. CHA Chief Operating Officer, [Jose Alvarez](#), explains it like this, "Section 3 has been on the books for 50 years. HUD wants you to put low-income people to work. They want you to prioritize on public housing residents and our folks that receive the housing-choice voucher subsidy. So, creating opportunities like the Section 3 JOC program, it's crucial."

OPPORTUNITIES AND MENTORSHIP ABOUND

With over 22,000 residential units to maintain, CHA has no shortage of jobs. However, according to Alvarez, it's not enough to provide opportunities to small businesses like Ricky Haynes's. That's why mentorship is a key component of the CHA's Section 3 program. "Small businesses don't know and don't have the capacity to go out there and bid work on their own. Because of our partnership with Gordian, it's a lot easier for us to identify vendors, put the support they need around them and put them to work immediately without having to go through a long procurement process."

[Ricky Haynes agrees](#). "They [Gordian] helped me. They were patient with me. They helped me build my proposals to be able to bid projects properly. I was under-bidding a lot of jobs. Now I have a real understanding of what I'm doing that I didn't have before JOC."

back when he was a tier one contractor, was to build a fence for around \$1,500. He is now a tier four contractor, completing projects that include full unit renovations. At each step, Ricky has made it a point to pay his opportunity forward.

"I started out with maybe two guys," Haynes said. "Getting to tier two I hired another guy and then another at tier three. By the way, these other guys are Section 3 residents. You see, it raises their self-esteem. They're learning skills that they can take with them for a lifetime."

INCREASING INCLUSION FROM COAST TO COAST

This success is not unique to CHA. Successful JOC programs promote economic growth and development in our communities while maximizing productivity and value-driven outcomes. The Housing Authority of Baltimore City has accomplished more than \$286 million in construction and achieved more than 49 percent MWBE participation since 2000 by using its JOC program. Los Angeles County has awarded nearly \$665 million in construction to certified small businesses in the last decade under its JOC program. [Gordian's JOC solutions](#) provide a streamlined construction procurement process for maintenance, repair and renovation projects while fostering diversity in contracting and subcontracting opportunities. The JOC process promotes local contractor involvement and by completing multiple projects under a single contract, small businesses can maximize their resources and obtain the necessary experience to grow.

CONCLUSION: IT'S ABOUT PEOPLE

Perhaps Ricky Haynes, unassuming business owner, sums it up best. "It's a huge impact on my business and it's a huge impact on my status in the community to be able to say that I have employees that come from my community working for me. Because of this program, I'm actually providing jobs for people to take care of their families. That's huge to me." ●

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FINDING AN ALLY:

These are the Relationships that Procurement Professionals Should Prioritize

BY JEAN CLARK



As public procurement professionals, you may think that it is important to increase your visibility and credibility with C-level leaders – the CIO, CTO, city manager, or mayor/governor. They are driving very high-profile and innovative government modernization initiatives that demand specific procurement capabilities. Without their cooperation and support, it can be challenging to define the requirements needed to successfully issue solicitations and make contract awards that will deliver their desired outcome.

At the same time, you may put effort into strengthening your bond with your finance and budget peers. These are the people that will ultimately approve and release the

funds for your purchases, which means they can either be very helpful in meeting customers' procurement deadlines or they can become a roadblock. However, there are really two other groups of people that influence your procurement performance capabilities much more than a C-level leader or finance/budget gatekeeper: Your suppliers and your end-user customers.

FOUR REASONS WHY YOU MUST STRENGTHEN THE PROCUREMENT-SUPPLIER-END USER RELATIONSHIP

The NIGP Business Council recently convened for an honest conversation about the state of "The Procurement-Supplier-End User Relationship" and made it our mission to bolster the bond between these three parties. Not because we want everyone to get along, but because we need everyone to get along. Collaboration and cohesiveness are mandatory if we want to meet rising government procurement demands, especially now that the ever-changing (i.e. increasingly lean) acquisition workforce is putting a strain on resource capacity while the growing use of technology is pushing the envelope on procurement capabilities.

Without trust, communication and a shared toolset with both suppliers and customers, it will be all but impossible for procurement to sustain the purchasing tempo of "everyday" buys much less advance anyone's modernization agenda. A strong supplier-procurement-customer relationship is necessary to navigate the inherent and new-age complexities of traditional, advanced, and services procurement processes. We must learn to rely on both customers and suppliers to educate us on the availability of new marketplace products and ultimately gain access to those products. We must also work in concert

to develop and implement new strategies in the delivery of services. In doing so, you will gain four key benefits:

- A broader knowledge and experience base from which to inform your actions
- Extra help to accomplish work
- Access to experts who are well-informed on current marketplace and supplier capabilities
- Independent, unbiased perspectives on procurement strategies and industry standards

These are not the only reasons why you should embrace a private sector-public sector teaming mindset, though.

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**IN THE NAME OF SERVICE: HOW RELATIONSHIPS
IMPACT SERVICES PROCUREMENT**

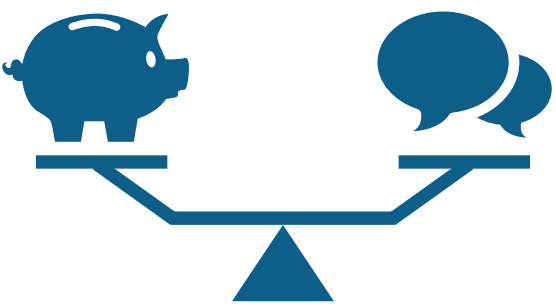
State and local services procurement equates to \$70 billion annually, making it the second largest spend category. It is arguably one of the categories whose spend value is most impacted by the quality of the supplier-procurement-end-user relationship. That is because the evaluation of service capabilities is often tricky, and the delivery of quality state and local government services is reliant on a well-coordinated execution model. Plus, the performance of services suppliers can be very subjective, with evaluations heavily reliant on feedback from both the customer and the supplier about what is working and what is not – and why. Just consider the involvement and responsibility of each party in the four stages of a typical services procurement lifecycle:

Scope Development: Procurement typically identifies and enlists the support of stakeholders across multiple public sector agencies (or across multiple departments for a single-agency solicitation) to define intended outcomes. Once everyone is in agreement about what they want the service to accomplish, then the procurement will (or should) start to solicit input from both suppliers and customers to define specifications and requirements based on need and actual marketplace capabilities. If the scope is developed in a silo, without both supplier and customer input, then you risk making incorrect assumptions

about the performance criteria, price schedule or other evaluation factors that should be included in the solicitation – or you risk omitting details that will help suppliers submit accurate proposals.

Procurement Strategy Development: Procurement teams should frequently solicit input from both internal stakeholders and industry experts when determining which procurement strategy is best suited for the requested service. Once you understand how a service should be performed, how many potential sources exist, the industry's fair and reasonable pricing thresholds, and other factors that influence selection and award criteria, it will be easier to match the contract type to the service's characteristics.

Evaluation: Procurement should also consider supplier and customer feedback when determining the importance, or weight, of each evaluation defined factor. For example,



**WHILE PROCUREMENT IS
TECHNICALLY LEADING THE
CHARGE FOR SERVICES
PROCUREMENTS, IT IS
IMPORTANT TO RECOGNIZE
PROCUREMENT'S LESS-CREDITED,
BUT HIGHLY MEANINGFUL
ROLE AS A COMMUNICATIONS
FACILITATOR AND – IN THE
CASE OF SERVICE PERFORMANCE
ISSUES – A MEDIATOR.**

should “best value” criteria always be used for professional services or solution-oriented services – as is typically the case? And should the “lowest cost” proposal receive a higher ranking for ancillary or easily-defined services. Third-party input can also help you determine if and when cooperative purchasing vehicles should be used for a service and how to properly select from that supplier pool.

Ongoing Contract Management: Without a clear understanding of minimum service capabilities, industry quality standards, and customer expectations, it will be very difficult to set the key performance indicators (KPIs) that will be used to measure the selected contractor's performance delivery. It is not enough to rely on customer requirements, as they may not be fair in terms of actual service capacity. That is why you must tap into those relationships you've built on both sides of the supplier-customer spectrum to gain an unbiased perspective of realistic performance expectations. In the course of your conversations with subject matter experts, you should also be able to derive the information needed to properly link KPIs to the requirements and payment schedule. It may be recommended that you conduct regular meetings to discuss KPIs and contractor performance. You may also learn from either suppliers or customers how to employ certain technology tools to better manage performance.

In other words, teamwork is essential to strategic procurement.

And open, honest communications regarding expectations and outcomes are non-negotiable in the services procurement lifecycle. So, while procurement is technically leading the charge for services procurements, it is important to recognize procurement's less-credited, but highly meaningful role as a communications facilitator and – in the case of service performance issues – a mediator. Inviting others to contribute to the strategic procurement and performance review process fosters the transparency and collaboration required to build strong, trusting supplier-procurement-customer relationships. And, it is those relationships that will enable you to extract the greatest value from every solicitation – whether it is a traditional, advanced or service procurement. ●

Jean Clark, FNIGP, CPPO, C.P.M., CPM is President of NIGP Code and Consulting Services at Periscope Holdings. She is an NIGP Past President and former State of Arizona Procurement Administrator.

COOPERATIVE PROCUREMENT'S EVOLUTION

BY TAMMY RIMES

Seeking greater value for each taxpayer dollar is always a goal for public procurement teams. However, the old days of “low bid” are slowly fading. While price will always be a driving consideration, it’s not the only one to be evaluated. Other factors might include viability of the chosen supplier, responsiveness and customer service, standardization across the agency, attaining social goals, or unique customer expectations for client departments, like public safety, IT or fleets.

The type of due diligence required in a public procurement process – with its requirements of transparency and competition – takes considerable time and resources. Saving staff time and obtaining products and services quickly are gaining higher importance in the procurement process. This perspective was echoed in a recent survey of state, local and education agency buyers conducted by the SLED Market Analysis team at Deltek reported that “nearly 40 percent of agency buyers and procurement staff are overworked and their number one top specific challenge was pre-bid research and planning, followed by lack of staff and resources.”

Meeting these daunting challenges has resulted in exponential growth in the use and choices of cooperative procurement. The idea is simple. A public agency establishes a contract through a competitive procurement process for other agencies to “piggyback”

on or adopt as their own contract. The saving advantages include: 1) price savings due to the increased leverage of combined spend from multiple agencies and 2) the savings in time and resources realized by the piggybacking agency in having the contract already solicited and awarded.

Departmental customers enjoy the benefits of getting the products and services that they want, when they need them, in less time. Piggybacking also allows agencies greater flexibility to select from the very newest technologies – which may not be available if they were limited to a single vendor on a long-term contract. Procurement teams, recognizing these benefits, have been a key driver in growth and utilization of cooperative purchasing.

With limited resources, quickly changing technologies, and higher customer expectations, public procurement’s role within their organizations is evolving and becoming more strategic in nature. Thus, the next evolution of cooperative procurement is approaching, with government teams leveraging this tool in new ways.



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CONCENTRATING CONTRACTS INTO ONE COMPREHENSIVE OPTION

Denver International Airport, the fifth-busiest airport in the United States — with more than 53 million passengers each year — needed to streamline their internal processes and reduce the number of contracts it manages. Each contract requires its own solicitation process, management, insurance renewals and monitoring. These administrative tasks, including managing individual vendor relationships, can become extremely resource intensive over multiple contracts.

The airport recognized their need for a more streamlined purchasing strategy and began researching other options. They decided to consolidate their data communications contracts into one contract – a WESCO Distribution cooperative contract. The result saved countless personnel hours issuing their own solicitation and executing the contract management processes. In addition, to leverage greater pricing, Denver International participated and combined spend with 65 surrounding city and county entities. By moving from a line-item contract with limited products to expanded product lines with more robust options available through the cooperative contract, each procurement department can meet their needs for electrical, lighting, voice and data communication, and maintenance, repair and operating supplies.

Having one contract that is used by multiple agencies is also helpful from the supplier side. “Our ability to support the broad array of products we distribute through one

contract with a lead public agency creates a great offer that has been competitively bid. Making this available to all eligible agencies looking to streamline their vendor base creates leverage for both sides in the supply chain,” says Rob Bezjak, WESCO director and general manager for the commercial, institutional and government market.

COMBINING COMMODITIES WITH SUPPORTING SERVICE

Uniforms are required for most government organizations – police, fire, utility and government personnel to clearly identify their roles to the public. And in some cases, labor union agreements require regular replacements and laundry options. One way to meet this need is the bundling of services with goods. Long Beach, Calif.’s uniform needs are extensive. With an annual budget of \$446,000 uniforms are needed for departments across the entire organization, including airport, fleet services, gas and oil, harbor, library, police, parks and recreation, public works and water department, with service components such as rental, laundry; delivery and pick up. With a complex number of service requirements, it would be extremely difficult for the city to go out to bid to address every expectation, as well as cover all possible unknowns.

In this case, the city chose a cooperative solution with Prudential Overall Supply through a rental program covering uniforms for 900 employees, roughly accounting for 19,800 garments. Karla Lopez, buyer for the city’s procurement services division, says, “There are benefits of time savings in having the solicitation already done, and that helps us take a strategic look at what may be needed for the future. An additional benefit is that the contract is already in place and being used and vetted by other agencies nationwide. Knowing that it is a proven contract, with the ability to conduct reference checks, provides additional comfort in the ability of the awarded firm to handle our needs.”

USING COOPERATIVES FOR CONSTRUCTION

Construction is a major category of spend for most governments and it is often a lengthy contracting process. Lubbock, Texas, is comprised of a population of more than 252,500 people, three universities and 380 facilities. Dallas, the largest nearby city is a five-hour drive and most surrounding communities reside within a three-hour vicinity. Because of this relative isolation, Lubbock suffers from limited competition amongst its construction contractors. This is problematic since many of the structures around the city were built nearly half a decade ago. Lubbock began seeking out new alternatives to get its construction projects completed.

The city looked to cooperative procurement options for a possible solution and

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discovered job order contracting to expedite repairs and renovations of its facilities and infrastructure. Specifically, Lubbock has benefited from Gordian's [ezIQC solution](#) – an alternative construction procurement method available through various national and regional cooperative purchasing networks. Since its introduction over a decade ago, project timelines have been reduced significantly and the number and use of local contractors has increased.

Wes Everett, director of facilities for Lubbock, states "It's tough if you only have one bidder, and then after award, things go bad. Having multiple contractors participate raises the quality of the responses, and competition helps maintain higher standards. We expect the highest value for the taxpayer dollar." The auditability of the process has been crucial in ensuring taxpayer dollars are going to best use. To date, Lubbock has spent \$14 million on 725 ezIQC projects.

CHANGES ON THE HORIZON FOR THE COOPERATIVE INDUSTRY

With the recognition of cooperative procurement as a best practice, coupled with the increase of cooperative choices, there has been evolution within the cooperative industry itself. On June 6, 2018, the National Joint Powers Alliance (NJPA), based in Staples, Minn., officially launched a re-branding effort. According to Executive Director and CEO, Chad Coquette, "We've been working to reshape our brand, as we recognize that much can happen in the life of an organization over the course of 40 years. The change of our name (NJPA) to Sourcewell is part of a complete branding evolution that demonstrates how we are purpose driven, attentive, and relationship oriented with our members. We are rallying around these concepts and several other organizational projects focused on providing an exceptional experience for members." With this re-branding effort, Coquette says, "We have started a new chapter in our history that will renew and refresh our journey and commitment to service. Our new name and logo help us better communicate what we hope to be for our members."

Acquisitions and merging talents and companies is another change on the horizon. In May 2018, OMNIA Partners finalized the purchase of Communities Program Management, (CPM), the organization that staffs and manages the operations of the U.S. Communities Government Purchasing Alliance (U.S. Communities). OMNIA Partners is a national group purchasing organization composed of four subsidiaries: National IPA, Prime Advantage,

"NO LONGER IS THE IDEA OF COOPERATIVE PROCUREMENT A 'FRINGE' IDEA FOR GOVERNMENT. IT IS NOW REGULARLY EXERCISED AS A MAINSTREAM PROCUREMENT OPTION AND WILL CONTINUE TO EVOLVE AS A TIME AND MONEY SAVING TOOL ESSENTIAL FOR GOVERNMENT PROCUREMENT TEAMS TO MEET THEIR INCREASINGLY COMPLEX DEMANDS."

Corporate United and now, U.S. Communities. "As the procurement industry evolves, it is important to provide incremental value to all stakeholders," says M. Todd Abner, President & CEO of OMNIA Partners. "In the public procurement sector, we have found these two companies to be highly complementary, which will become even more clear as we take a methodical approach to operate the organizations."

While some cooperatives strive to provide contracts across all sectors, some have chosen a different route. Focusing primarily on one sector – education – is the central theme for E&I Cooperative Services, based in Jericho, N.Y. E&I believes that concentrating on one sector ensures the contracts offered to higher education and K-12 institutions meet their unique needs, both in terms of products and services, as well as contract terms and conditions. Taking that focus one step further, E&I's approach is to select a category such as sciences and develop a full suite of contracts to meet its members' needs across that entire category. For

example, a university research and development lab may cover all their laboratory and scientific equipment purchases within a focused set of contracts. According to Sabra Schell, E&I's executive director of marketing, "In this way, end user departments can leverage E&I contracts across the entire spectrum of their procurement needs, creating efficiencies and making contract consolidation easier."

The cooperative industry has also formed a new Association – the National Cooperative Procurement Partners (NCP) – to serve as the educational arm and legislative advocate for cooperative procurement. Formed just two years ago, its growing membership established a mission to "support all stakeholders in leveraging and utilizing a cooperative procurement strategy to best serve the public good."

With educational materials such as the "Road Map to a Cooperative Procurement Strategy" and an active speaker's bureau, NCP strives to keep abreast of all activities related to cooperative procurement and to serve as a free resource in this ever-developing marketplace. Crosby Grindle, NPPGov president and NCP board member states "no longer is the idea of cooperative procurement a "fringe" idea for government. It is now regularly exercised as a mainstream procurement option and will continue to evolve as a time and money saving tool essential for government procurement teams to meet their increasingly complex demands." ●

Tammy Rimes is executive director of the National Cooperative Procurement Partners.

PURCHASING POWERFULLY

Cooperative procurement drives innovation and efficiencies.

BY TAMMY RIMES



Ask any government office, “what do you think of your purchasing processes?” and the answers can vary from “slow and cumbersome” to “hard to navigate and understand.” It might be surprising to many, that procurement professionals will often agree with that assessment. Public procurement rules and regulations, the need for competitive and transparent processes and ever-changing landscape of

government needs can push any team to its limits. So, it’s not necessarily purchasing’s fault. Many teams were significantly reduced during the past recession, with resource levels never fully re-staffed upon the economic recovery, and the so-called ‘silver tsunami’ of increasing boomer retirements, with a lack of knowledgeable replacements, is also adding to the problem.

In a recent government survey by Gov+Win from Deltek, procurement teams across the nation were asked about their top challenges.

“The percentage of government purchasing staff that report being over-worked has steadily climbed in our survey from 35 percent in 2016 to 42 percent in 2018, and to some extent, is starting to look more like a tech start-up than a government bureaucracy in expectations for hours and workloads,” Paul Irby, principal research analyst at GovWin IQ SLED says.

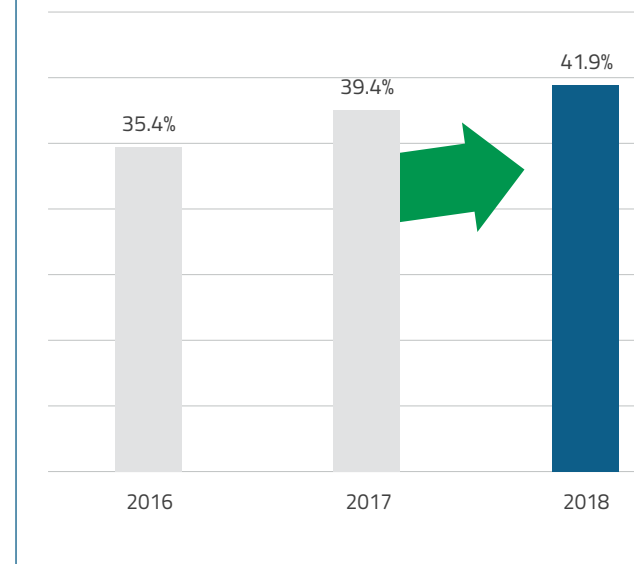
The other top challenges cited in the survey include budget and resource constraints, lack of time to conduct in-depth research, ever-increasing workloads and most recently, lack of quality suppliers bidding on available contracts.

As a result, procurement teams are responding in recent years with innovative techniques and new ways to meet the growing and diverse needs of their organizations. Cooperative procurement is one of those available tools to increase productivity while maintaining high standards and best practices.

WHAT IS COOPERATIVE PROCUREMENT?

The concept of cooperative procurement isn’t only of interest to the procurement department. By becoming better informed on the process, leaders across the organization can experience efficiencies and a wide range of benefits to meet operational challenges through cooperative purchasing.

“WE’RE STRETCHED WORKING EXTRA HOURS”



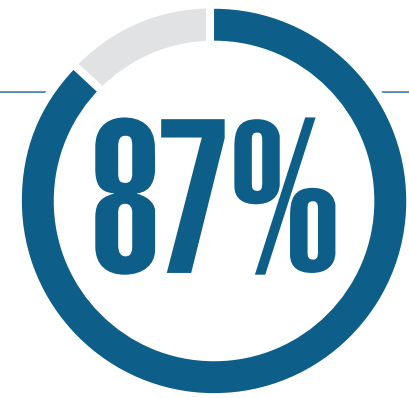
The idea is simple. A lead agency, or cooperative organization, typically conducts the solicitation, allowing other agencies to “piggyback” on the resulting contract to obtain those same goods and services. One of the primary benefits is that it combines multiple agency requirements on a single contract to aggregate spend volumes, thus raising the purchasing power of each participating entity. The result? A small school district in Montana can garner the same purchasing power of a large city like San Diego.

“Entities also benefit from the technical specifications development used in the solicitations for equipment and services not routinely purchased,” Ronnie Barnes, from HGACBuy Cooperative Purchasing, says. “Furthermore, cooperatives are the repository and defender of all related solicitation and contract documents. All credible cooperative organizations provide these documents, with supporting materials, to assist entities in providing transparency to the process.”

Cooperative purchasing for commodities reached “mainstream” status among local governments several years ago, judging from the Deltek survey of procurement staff. Nearly 87 percent of governments are currently using cooperatives with increasing growth. The growing level of participation is due primarily to a greater degree of adoption and utilization, as cooperative choices continue to expand into new offerings for technology, services and construction. Wayne Casper, former chief procurement officer for the State of Arizona and Director of Procurement for Tucson, Ariz., and currently Group vice president with National IPA, a national cooperative purchasing organization, has seen the expansion of cooperative purchasing over his decades of public procurement experience. He says, “cooperative purchasing has evolved to become a procurement best practice in local government. The utilization of cooperatives allows the purchasing teams to better focus on best value and become strategic contributors to the success of their organizations.”

STATE OF HAWAII DRIVES SAVINGS IN CAR RENTAL CONTRACT

Building on the idea of cooperative contracting, Hawaii created such a state-wide contract for intra-state car rentals. Nineteen state agencies, various local municipalities and 170 boards and commissions coordinate government activities across eight main islands. For government employees working on the mainland, the option to jump into a government-issued car and drive across the assigned jurisdiction is generally taken for granted. In the Aloha State, going from one island to another takes a lot more



**NEARLY 87 PERCENT
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coordination. Flights must be arranged, and upon arrival, a rental car must be used to travel across the island, since bus service isn’t always available or convenient. There is the additional challenge of the competing tourist market, and having a rental car readily available, at a reasonable cost.

The solution? A state-maintained cooperative contract for rental car services. Used by multiple agencies, “Hawaii State Cars” provides a dedicated easy-to-use reservation system with guaranteed compact car upon arrival when conducting government business. According to Bonnie Kahakui, eProcurement Supervisor for the State Procurement Office, “drivers have benefitted from the expedited check-in process with pre-negotiated features like guaranteed availability and gas-fill up. In addition, the contract has made it easier for travel coordinators to quickly make reservations, even on last-minute trips.” The rental car companies – Alamo, Enterprise and National – can afford to offer deeply discounted rates due to the steady revenue from a government

contract vs. the ever-fluctuating tourist market. Most importantly, savings have resulted. Contracted in September 2017, the contract has been used for a combined 19,000 rental days with an overall savings of \$300,000, when compared to open market rates.

CITY OF BOISE FLEET OPERATIONS STREAMLINED

For any large municipal fleet operation, maintaining a large auto parts inventory has traditionally been part of the operational strategy. However, this often places a burden on the budget – with thousands of dollars in inventory sitting on the shelves, or sometimes becoming obsolete, as fleet vehicles and equipment are upgraded. It also requires staffing resources, who may be divided across several operational duties. In today’s age of online ordering and same-day delivery, maintaining large on-site inventories is becoming a practice of the past.

Boise, Idaho, envisioned a better way of doing business by consolidating fleet resources and embarking on an out-sourced inventory management system. With a wide array of fleet vehicles, ranging from pool cars to heavy equipment, their approach was that any outsourced effort must simplify the process, and have one point of contact for parts to service all fleet assets. The selected company is expected to conduct the due diligence for tracking down the right parts from multiple suppliers, coordinating deliveries, providing comprehensive reports and issuing one invoice. In addition to minimizing the fleet parts inventory, the accounting and payment portion has also been streamlined



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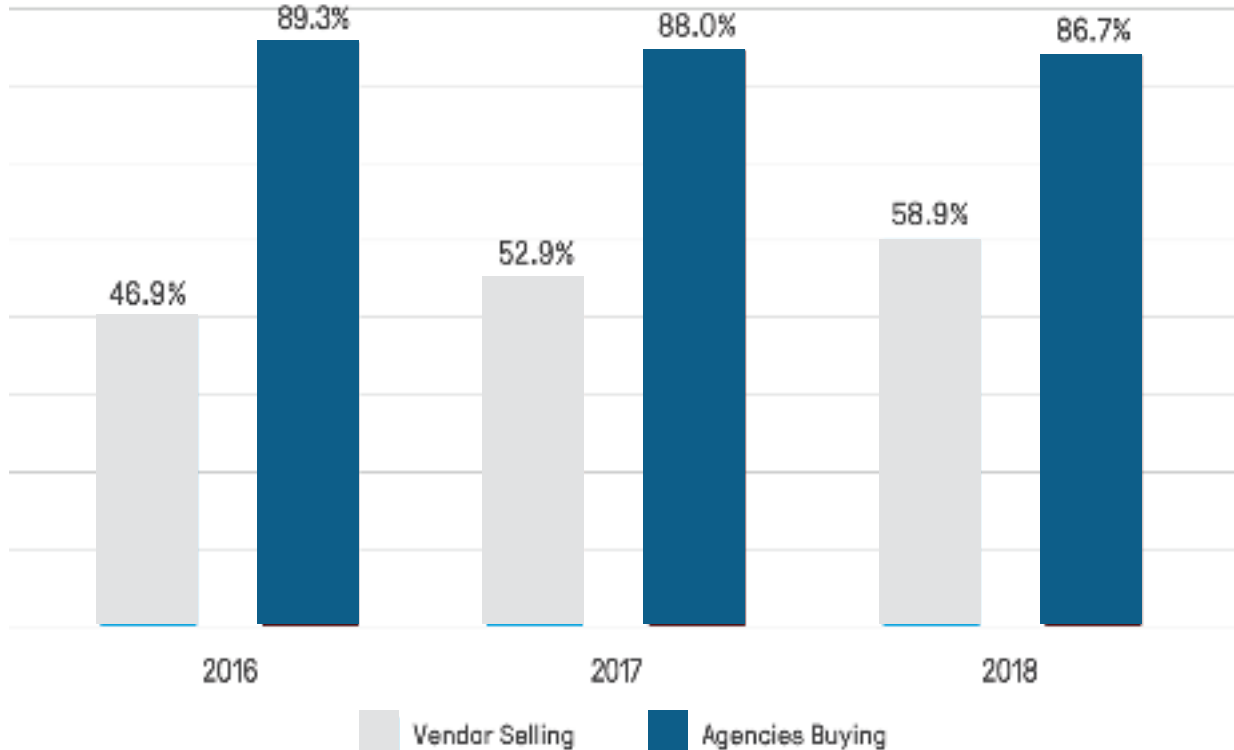
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from hundreds of invoices from multiple companies to one master invoice from one company each month. Even setting up this type of operation has been simplified, with the bid and award process for the integrated business solution for parts and service readily available through a cooperative contract.

“By outsourcing our parts management to NAPA Integrated Business Solutions, we negotiated a one-time sale of our inventory assets for an immediate \$64,700 in cash flow and reduction in overhead cost,” Craig Croner, Boise’s administrative services manager and recipient of the Government Fleet GFX 2015 Leading Fleet of the Year, says. “Furthermore, we were able to gain efficiencies in wrench turning hours by reducing our technician involvement in parts processing from 14 percent down to 3 percent of actual time. Our technicians are now more involved on the actual shop floor, adding value and increased production time. Efficiencies have been realized in reduced city-wide administrative functions by consolidating payment statements, yearly inventory functions, and warranty processing handled by the supplier.”

ADOPTION OF COOPERATIVE PURCHASING



CONSTRUCTION REPAIRS IN SHORTER TIME FRAMES

Tinley Park, Ill., is unique in its location within two counties – Cook and Will. The Village is approximately 16 square miles and is home to almost 60,000 residents. When asked about the changing role for government facilities teams, Terry Lusby, the village’s facilities and fleet superintendent states “It’s very fast paced, and you have to stay up-to-date on all current facility issues, particularly when it affects operational needs.”

In prioritizing the workload for most facility teams, the top priority is life safety issues. A recent example was the Village’s police station, where the rooftop air handler units were virtually on their last leg, resulting in heating and cooling issues within the building. With the extreme cold or hot weather in this midwest location, it was considered a life safety issue. In addition to protecting employees and visitors to the site, another pressing issue was this location also housed prisoners, who have state and federal requirements related to their safety.

“This was a big issue we had to get taken care of this quickly as possible,” Lusby says. “So, we used a cooperative contract, called Gordian’s ezIQC® solution to switch out the two rooftop units in a very time efficient manner.”

Also known as job order contracting (JOC), established by local, competitively-awarded contracts through cooperative purchasing networks, this construction solution is used by states and many municipalities for renovation and alteration work, responding quickly to emergencies, addressing a backlog of deferred repairs and straightforward new construction.

With only eight team members, competing priorities within Tinley Park can often create a backlog in repairs.

“I think a lot of facilities managers find themselves in a predicament – when there’s an emergency or something is pressing – the decision is made in haste before the plan is well thought out or the contractor is selected without being fully vetted,” Lusby says. “Later, when the work doesn’t get done correctly, you find yourself going back and spending additional monies and resources on something that could have been done better, but the process was rushed.”

Through a cooperative JOC contract, the village now quickly onboards local contractors who are already vetted, with the necessary skill sets to complete projects needed across the jurisdiction.

ACHIEVING SUSTAINABILITY GOALS WHILE REDUCING COSTS

Tucson, Ariz., was looking for an environmentally responsible, cost-effective way to provide janitorial and sanitation supplies to meet the City’s goals for conservation

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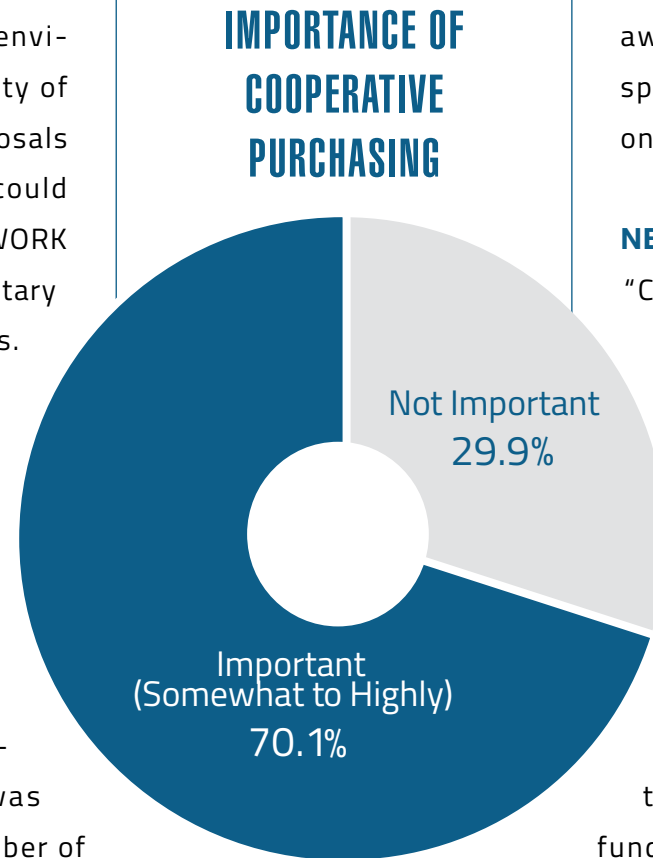
and sustainable development. The scope expanded beyond the environmental responsibility, as it also impacted the health and safety of employees and the community. The city issued a request for proposals which resulted in a national cooperative contract solution that could also be utilized by other municipalities. The ultimate award to NETWORK Services Company, serviced through its local distributor, WAXIE Sanitary Supplies helped support their sustainable procurement practices. There were added value propositions of product and process, best practice training, robust reporting, and consultations with industry experts to manage responsible use and minimize waste.

“Awarding a janitorial and sanitation supply contract to be used by all departments of the City helped reach our sustainability goals,” Marcheta Gillespie, the city’s former director of procurement who oversaw this contracting effort, says.

With an increase of 20 percent more spend toward green purchasing, the cost reduction in the first year of the contract was \$73,000. By consolidating the spend under one contract, the number of orders was also reduced by 19 percent, thus reducing ancillary environmental impacts such as fuel use, noise and traffic. With a shift toward efficient towel and tissue products, and right-sized can liners, waste and maintenance costs have also been significantly reduced.

ON THE OTHER SIDE – SUPPLIER PERSPECTIVE

The Deltek survey showed that 59 percent of those surveyed companies participate in cooperative contracts, with a full 70 percent admitting they consider cooperative contracts “important” to their ability to grow their state and local government revenues in the coming year. Why would a company want to enter into a contract that might minimize profit margins, with potential value-added requirements? Because responding to individual city, county and other local agency bids and RFP’s can be very cumbersome, time-consuming and expensive. By responding to one RFP for a national or regional cooperative contract, a supplier has the ability to leverage the awarded contract to gain government business without having to respond to hundreds of individual efforts. In addition, with the easier avenue of contracting with private industry vs. the public market, some suppliers are opting out of the more cumbersome government route. A recent phenomenon is occurring in some jurisdictions across the country is the difficulty of finding qualified vendors to respond to their solicitations. Choosing an already



awarded cooperative contract may be an option to eliminate the time spent on creating a comprehensive bid document, then putting it out on the street and experiencing the risk of having no suppliers respond.

NEWLY RELEASED HARVARD WHITE PAPER TOUTS THE BENEFITS

“Cooperative Procurement: Today’s Contracting Tool / Tomorrow’s Contracting Strategy,” a white paper recently published by Harvard’s Kennedy School of Government, concludes that “Cooperative (coop) purchasing clearly can add value.

The challenge for chief procurement officers and elected officials is to achieve the right balance where they receive value from coop purchasing while retaining the ability to control overarching policy and specialized local conditions. The primary advantage for acquisition officers will be the opportunity to push routine work off to nationally-accepted practitioners and/or to secure from those coops specialized expertise and, in turn, free up their time and funds for more complex and unique issues.

“Cooperative procurement can truly be a liberating and effective tool in the strategic sourcing toolbox for public procurement professionals,” Jeremy Schwarz, director of operations and procurement for Sourcewell says.

According to the research, “procurement professionals across the country want to develop relationships with vendors, and cooperatives provide a platform for a mutually beneficial relationship. Some cooperatives have established vendor advisory boards, which work with vendors to establish best practices and address “pain points” they face in the typical procurement process.”

“Our white paper reinforced my former experience... in the belief that creative approaches to procurement can incorporate expertise and facilitate innovation,” Stephen Goldsmith, former mayor of Indianapolis and former deputy mayor of New York City says. “As the cooperative movement matures, it brings in new tools and approaches that can offer hope for beleaguered procurement shops aspiring to both get beyond the commodity work and to better understand new technologies.”

Released in October 2018, the white paper was commissioned by the National Cooperative Procurement Partners Association which is taking the lead in providing educational content, advocacy and leadership in this ever-expanding industry. ●

Tammy Rimes, MPA, is the executive director for National Cooperative Procurement Partners and former purchasing agent for San Diego, Calif.

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