

**Quarterly Meeting of the  
Center for Job Order Contracting Excellence**

Location: Hampton Inn, Houston, Texas

April 6-8, 1999

Tuesday, April 6, 1999

Attendance

Rich	Barrick	Allied Surety
Ken	Jayne	Applied Innovative Management
Robert	Newberry	BENECO Enterprises
Onzie	Jones	Brown & Root
Bill	Sweetser	Centennial Contractors Enterprises, Inc.
Rich	Benton	Centennial Contractors Enterprises, Inc.
Rex	Shaver	DEL-JEN, Inc.
Kurt	Ludwig	DEL-JEN, Inc.
James	Brown	Detroit Housing Commission
Allan B.	Cleveland	Estimating Systems, Inc.
Ziad	Al-Sharmani	PBSRG-ASU
Syed	Raza	PBSRG-ASU
James	Shannon	PI Construction Corporation
John	Davis	PI Construction Corporation
Michael	Moore	RS Means-Consulting Services
Robert	Coffey	The Gordian Group, Inc.

**Work Session:**

1. The meeting was called to order by Bill Sweetser at approximately 8:20am.
2. Mr. Sweetser welcomed James Brown (new CJE member) from Detroit Housing Commission.
3. The January 1999 quarterly meeting minutes were reviewed and approved.
4. It was agreed that Rich Benton will be the point of contact for next quarterly meeting arrangements in Washington DC (July 22-23, 1999). The meeting agenda and hotel information to be provided within the next two months. CJE members are encouraged to bring presenters from DOD, National Institutes of Health, NASA, Washington Sanitary Sewer Service, and DC public schools.
5. The third quarterly meeting (October 26-27, 1999) will be held in Atlanta, GA. Robert Coffey (The Gordian Group) will be the point of contact. The meeting agenda and hotel information to be provided in August 1999.

**Committee Chairpersons' Reports on Action Items**

**Education Committee**

1. Dr. Kashiwagi has completed the JOC article. A copy will be mailed to Cost Engineering Magazine for possible publication in the October or December 1999 issue. Also edited versions will be mailed to *Today's Facility*, BOMA, IFMA, APPA, ASU and CEFPI.
2. Ken Jayne has completed the JOC presentation. A copy has been provided to ASU.
3. Rich Barrick has prepared a rough draft/questionnaire on the bonding education-write up. He contacted a few of the CJE contractors' bonding companies and did not receive sufficient information yet. His research is still on going and he will provide more feedback next quarterly meeting.

4. All CJE members are continuously encouraged to obtain more case studies and photographs to enhance JOC presentation. This is an on going action item.
5. Ken Jayne has completed the point paper for facility owners on how CJE can assist them. A copy has been provided to ASU.

### **Member Benefits Action Items**

1. Suggestions were made to develop a general database that would include facility owner's name, site (location), JOC (municipal, state, federal), and methodology of award (Low-bid or Performance Based). This database will be updated regularly. The objectives of this database is to differentiate between low-bid and performance awards at known JOC sites and to be aware of the date of expiration of each award. This information will assist the CJE members in their marketing benefits. All CJE members will send Ziad Al-Sharmani any information that can be consolidated under this database
2. A "Thank you" letter along with the 1998 survey results were faxed to all JOC point of contacts who have responded to the CJE annual JOC/SABER/DOC survey.
3. Robert Coffey, Jim Shannon, and Clayton Kline are still reviewing the annual facility owner survey questions. The team will provide their review conclusions next quarterly meeting. Consider differentiating responses between multiple award and single award JOC sites.
4. All CJE members must always try to establish relationships with the JOC industry. All member are welcomed to use the CJE resources (1998 JOC book, JOC article, and newsletter) to bring more facility owners to the quarterly meeting.
5. The newsletter has been completed on March 15, 1999. All CJE members will be mailed the current issue for further industry distribution.
6. Syed Raza has been providing a clearinghouse of upcoming JOC bids to all members twice a month. This action item will be on going till further notice.
7. 1998 JOC Performance book has been published (150 copies). 30 copies were brought to this meeting. All members are encouraged to buy the book and use it as a marketing tool.

### **Administrative Action Items**

1. All CJE members are highly encouraged to bring more members (facility owners/contractors/consultants). This is an on going action item.
2. Earlier this year suggestions were made to create a confidential database with contact information by using OUTLOOK 98. Each member will provide their point of contacts by 5/15/99. Each member's contact information will not be disclosed to any other member without his/her permission. A database format was approved by Robert Coffey in March 1999. CJE is currently awaiting members to mail or fax their point of contacts. Members will be contacting ASU and inform the coordinators which contacts to receive the newsletter, JOC Performance Book, quarterly meeting minutes and all other CJE handouts.
3. It has been agreed that the 1999 JOC Performance book will disclose the identity of CJE contractors' performance lines.
4. Ken Jayne has provided the contact for audio teleconference meetings, which may interest many facility owners to participate if there are no travel funds available.
5. Ziad Al-Sharmani indicated that the 1999 CJE budget will be presented next quarterly meeting in Washington DC.
6. The current CJE newsletter will be mailed out as soon as the CJE members provide a complete physical address for each of their contacts.
7. Ziad will address how to refine the CJE website so it facilitates easier and quicker access to popular items.

8. A committee was established to definitize the criteria to be a “Certified Performance Based JOC Contractor.” Bob Newberry will be chairman with assistance from Ken Jayne and Rex Shaver. Initial feedback will be provided next meeting.

### **Additional Old Business**

1. David Pinkerd has left Brown & Roots Services. Information regarding his new job and position will be provided next meeting.
2. Ziad Al-Sharmani announced that new point of contacts from ASU will be Jamie Conner, Syed Raza, and Ziad.
3. Ziad Al-Sharmani was elected to join the Members Benefit Committee.
4. Bill Sweetser asked for volunteers to go to various conferences, seminars and give CJE/JOC presentations. This would help in increasing the number of members. For this purpose he asked ASU to prepare a list of dates regarding these conferences and seminars and e-mail this list to CJE members or post it on the CJE web site.

### **New Business**

1. Rich Benton asked members to consider attending the following meeting (Point of contact is Angela Nail):
  - ACQUISITION REFORM ROADSHOW- REENGINEERING FACILITIES ACQUISITION, MAY 24-25, 1999 NORFOLK VA (*Date might be delayed to November 1999!*)
2. Members discussed the following:
  - SBA proposed regulation on contract bundling.
  - ABA recommendations on past performance FAR guidance
  - Rich Benton asked members to provide additional JOC articles to CJE and disseminate latest developments affecting the JOC market among members through CJE.
  - Members decided to broaden the definition of JOC. It was agreed that next survey would include SOC/TOC questions and obtain the facility owners/managers feedback.
3. A suggestion was made to start using the term “performance based JOC” in contrast to “price book JOC” in writings to clearly define the CJE focus.
4. The morning session adjourned at approximately 12:00pm.

### **Afternoon Session**

1. ***Panel Discussion on Department of Defense Procurement Policy on Indefinite Delivery - Indefinite Quantity Contracting for Construction***
  - Ms. Bunnatine Greenhouse, U.S. Army Corps of Engineers, Principal Assistant Responsible for Contracting. She spoke in detail about USACE focus, challenges, construction contract strategies, partnering/alliances, initiatives and policies. (Please review attached presentation handout for further details). Mr. Mike Howard, Naval Facilities Engineering Command Director of Strategic Planning & Community Management. He spoke about managing the acquisition process to meet the Navy’s goals. (Please review attached presentation handout for further details)
2. ***What is the Center for Job Order Contracting Excellence and Why Should I Belong?***
  - Ken Jayne, P.E., Applied Innovative Management. (Please review attached presentation handout for further details)

3. ***Panel Discussion on What the Installation Commander Wants From a Job Order, Task Order, Delivery Order, or SABER Contractor (Please review attached presentation handouts for further details)***

- COL Richard Craig, DPW Fort Hood
- COL Jim Hougnon, Deputy Commander Great Lakes & Ohio River Division, USACE and former DPW Fort Bragg
- LT Frank Mulcahy, Assistant Public Works Officer, Naval Air Station Whidbey Island
- Earnetta Brady, Command Project Engineer, Randolph Air Force Base

Attachments

1. Agenda
2. Listing of Attendees
3. CJE Action Item List

**Agenda**  
**Center for Job Order Contracting Excellence**  
April 5-9, 1999  
In Conjunction with ☉S.A.M.E. National Training Conference  
Houston, TX

**Monday, April 5, 1999**

7:00- Dinner for CJE Members and Guests  
Restaurant (Willie G's)

**Tuesday, April 6, 1999**

8:00 - 11:45 Business Meeting

- Review and Acceptance of Previous Meeting's Minutes
- Next Meeting Details
  - ⑧ Washington, DC: July 20-21
  - ⑧ Atlanta, GA; October, 1999
- Report of Committee Chairperson's on Action Items
  - ⑧ Education Committee
  - ⑧ Member Benefits Committee
  - ⑧ Administrative Committee
- Additional Old Business
  - ⑧ How to Develop More Non-Federal JOC's
- New Business Items
  - ⑧ Acquisition Roadshow, May 24-25
  - ⑧ SBA and Contracting Bundling
  - ⑧ ABA Recommendations on Past Performance FAR Guidance

11:45 - 1:00 Catered Lunch from Berryman's

1:00 - 2:15 Panel Discussion on *Department of Defense Procurement Policy on Indefinite Delivery - Indefinite Quantity Contracting for Construction*

- Ms. Bunnatine Greenhouse, U.S. Army Corps of Engineers, Principal Assistant Responsible for Contracting
- Mr. Mike Howard, HQ, Naval Facilities Engineering Command, Director of Strategic Planning & Community Management

2:15 - 2:45 Break

2:45 - 3:15 What is the Center for Job Order Contracting Excellence?

- Ken Jayne

3:15 - 4:45 Panel Discussion on *What the Installation Commander Wants From a Job Order, Task Order, Delivery Order, or SABER Contractor*

- COL Richard Craig, DPW Fort Hood
- COL Jim Hougnon, Deputy Commander Great Lakes & Ohio River Division, USACE and former DPW Fort Bragg
- LT Frank Mulcahy, Assistant Public Works Officer, Naval Air Station Whidbey Island

- MS. Earnetta Brady, Command Project Engineer, Randolph Air Force Base

⊙7:00 - 9:00 S.A.M.E Icebreaker & Stage Show (Wortham Theater Center)

**Wednesday, April 7, 1999**

⊙S.A.M.E. National Training Conference

7:30 - 6:00	Exhibit Hall Open (Convention Center Exhibit Hall)
9:00 -	Grand Opening Ceremony, Keynote Speaker
10:30 - 11:45 & 1:30 - 4:45	Technical Sessions
5:00 - 7:00	Reception

**Thursday, April 8, 1999**

⊙S.A.M.E. National Training Conference

7:30 - 5:30	Exhibit Hall Open (Convention Center Exhibit Hall)
11:00 - 11:45 & 2:30 - 4:45	Technical Sessions

9:00 - 10:00 What is Job Order Contracting

- Ken Jayne

10:00 - 10:20 Break

10:20 - 12:20 Performance-Based Contracting

- Dean Kashiwagi, Ph.D., P.E.

⊙2:45 - 3:15 S.A.M.E. Technical Session on *Artificial Intelligence & Job Order Contracting*

- Dean Kashiwagi, Ph.D., P.E.

⊙6:15 - 9:00 S.A.M.E. Honors Reception & Banquet

**Friday, April 9, 1999**

⊙S.A.M.E. National Training Conference

7:15 - 1:15	Exhibit Hall Open (Convention Center Exhibit Hall)
8:45 - 10:00	City Public Works Directors Briefings
10:30 - 11:45	Service Chiefs Briefings
6:30 - 11:00	Society Reception & Ball

⊙ S.A.M.E. Events require separate registration fee paid directly to S.A.M.E. to attend.

## Listing of Attendees - April 6, 1999

No.	Name	Company	Phone Number	Fax Number
1	James Shannon	PI Construction Corporation	800-431-1161	512-918-1165
2	Rich Benton	Centennial Contractors Enterprises, Inc.	703-287-3044	703-287-0009
3	Ken Jayne	Applied Innovative Management	713-964-6720	713-622-5513
4	Rex Shaver	DEL-JEN, Inc.	931-552-0515	931-552-3588
5	Robert Coffey	The Gordian Group, Inc.	800-874-2291	864-233-9100
6	Bill Sweetser	Centennial Contractors Enterprises, Inc.	703-287-3040	703-287-0012
7	Allam B. Cleveland	Estimating Systems, Inc.	800-967-8572	508-428-3573
8	Robert Newberry	BENECO Enterprises	801-565-1122	801-565-1761
9	John Davis	PI Construction Corporation	800-431-1161	512-918-1165
10	Rich Barrick	Allied Surety	972-490-3393	972-490-7475
11	Michael Moore	RS Means-Consulting Services	800-448-8182	781-585-7466
12	Kurt Ludwig	DEL-JEN, Inc.	931-552-0515	931-552-3588
13	James Brown	Detroit Housing	313-877-8000/8822	313-877-8067
14	Onzie Jones	Brown & Root	713-260-3207	713-260-3291
15	Ziad Sharmani	PBSRG-ASU	602-965-4273	602-965-4371
16	Syed Raza	PBSRG-ASU	602-965-4273	602-965-4371
17	Alexandra Zimmerman	Brown & Root	713-260-3757	713-260-8400
18	Craig Richard	US ARMY	N/A	N/A
19	Gary Hoovestal	Greenway Enterprises Inc.	406-458-9411	406-458-6516
20	Earnetta Brady	US AIRFORCE	210-652-2732	210-652-3597
21	Francis P. Mulcahy	Public Works Department Naval Air Station	360-679-6946	360-257-5175
22	Bunnatine Greenhouse	HQ US ARMY CORPS OF ENGINEER	202-761-8642	202-761-4752
23	Mike Howard	HQ NAVFAC	N/A	N/A
24	James Hougou	HQ US ARMY CORPS OF ENGINEER	312-353-6310	N/A
25	Douglas Parrish	City of Houston	281-230-2010	281-230-3043
26	William Humby	City of Houston	713-640-3000	N/A
27	Rachel Suarez	City of Houston	713-247-2481	N/A

## Listing of Attendees - April 8, 1999

No.	Name	Company	Phone Number	Fax Number
1	Douglas Parrish	City of Houston	281-230-2010	281-230-3043
2	William Humby	City of Houston	713-640-3000	N/A
3	Jim Hepburn	PI Construction Corporation	800-431-1161	512-918-1165
4	Donald Brenneman	Tetra Tech	713-647-8324X203	713-647-8262
5	Rachel Suarez	City of Houston	713-247-2481	N/A
6	James Brown	Detroit Housing	313-877-8000/8822	313-877-8067
7	Ken Jayne	Applied Innovative Management	713-964-6720	713-622-5513
8	Kurt Ludwig	DEL-JEN, Inc.	931-552-0515	931-552-3588
9	Rich Benton	Centennial Contractors Enterprises, Inc.	703-287-3044	703-287-0009
10	Walter Torres	Texas Dept. of Transportation	713-802-5487	713-802-5480
11	Onzie Jones	Brown & Root	713-260-3207	713-260-3291
12	Clay Kline	AssetWorks	210-301-1701	210-301-0299
13	Valen Morris	Neogard	281-351-0070	281-351-0080
14	Jeri Burgess	Neogard	214-353-1689	214-357-7532
15	A.J. Restum	Scatterfied & Pontikes Construction.Inc.	713-690-0808	713-690-2299
16	Rich Barrick	Allied Surety	972-490-3393	972-490-7475
17	Bill Hladick	PW Stephens	N/A	N/A
18	Bob Barber	PW Stephens	N/A	N/A
19	Stan Decker	LS Decker, Inc.	713--880-4343	713--880-1990
20	Joe Castillo	C2M, Inc.	210-826-3855	210-826-5222
21	Dean Kashiwagi	PBSRG-ASU	602-965-4273	602-965-4371

## CJE ACTION ITEMS LIST

### Education Committee

Chair: Ken Jayne: 713/964-6720  
 Applied Innovative Management, Inc.  
 Members: Rich Barrick - Allied Surety  
 Robert Coffey - The Gordian Group  
 Lynn Thompson - The Gordian Group

### Member Benefits Committee

Chair: Dave Pinkerd:  
 Members: Rich Benton - Centennial Contractors  
 Ziad Al Sharmani- ASU

### Administrative Committee

Chair: Bill Sweetser: 703/287-3040  
 Centennial Contractors  
 Members: Rich Benton

Action Item	Responsibility	Promised Completion Date	Comments
<b><u>Education Action Items</u></b>			
1. Prepare and publish article comparing pros and cons of JOC/TOC/SOC.	Dean Kashiwagi	Dependent on publisher	Dr. Kashiwagi has completed the JOC article. Will be forwarded to Cost Engineering for publication. Also edited versions will be mailed to Today's Facility, BOMA, IFMA, APPA, ASU and CEFPI.
2. Prepare an education write-up on bonding to be posted on the Internet after the consent of the members.	Rich Barrick	On-going	Rich Barrick has prepared a rough draft/questionnaire on the bonding education-write up. His research is still on going and he will provide more feedback next quarterly meeting.
3. Obtain more case studies and photographs to enhance JOC presentation.	All	On-going	
<b><u>Member Benefits Action Items</u></b>			
1. To develop and update a general database which includes the facility owner's name, site (location), type of JOC and methodology of award.	Ziad Al Sharmani		The objectives of this database is to differentiate between low-bid and performance awards at known JOC sites and to be aware of the date of expiration of each award. This information will assist the CJE members in their marketing benefits. All CJE members will send Ziad Al-Sharmani any information that can be consolidated under this database

Action Item	Responsibility	Promised Completion Date	Comments
2. Send letters to responding JOC survey sites with survey results and CJE brochure.	Ziad Al Sharmani	Completed	
3. Review annual facility owner survey questions.	Robert Coffey, Jim Shannon and Clayton Kline	Proposals at July meeting.	Robert Coffey, Jim Shannon, and Clayton Kline are still reviewing the annual facility owner survey questions. Consider asking about change orders. Focus should be on clarifying and adding questions so trend analysis can continue.
4. Work to establish relationships with industry.	All	On-going	Distribute CJE Book, Brochure, Newsletter, Point Papers and make presentations to bring more facility owners to the quarterly meeting.
5. Write and distribute newsletter regularly.	Ziad Al Sharmani	Next issue distributed by July meeting.	All CJE members will be mailed the current issue for further industry distribution.
6. Operate a clearinghouse of upcoming JOC bids and provide to members biweekly.	Syed Raza	On-going	
7. Publish and distribute 1998 JOC Performance Book.	Ziad Al Sharmani	Completed	All members are encouraged to buy the book and use it as a marketing tool.
8. Consider integrating a write-up explaining performance-based Job Order Contracting in the R.S. Means estimating books that provide a reference to CJE.	Michael Moore	Next Meeting	Report on R.S. Means acceptability and viability.

Action Item	Responsibility	Promised Completion Date	Comments
<b><u>Administrative Action Items</u></b>			
1. Increase membership.	All	On-going	
2. Standardize future business meeting format and seminars; coordinate dates.	Bill Sweetser	On-going	Next meeting in the Washington, DC area July 22-23,1999. Following meeting near Atlanta, Georgia October 26-27, 1999.
3. Create confidential database with contact information.	Ziad Al Sharmani	On-going	Each member will provide their point of contacts by 5/15/99. Each member's contact information will not be disclosed to any other member without his/her permission CJE is currently awaiting members to mail or fax their point of contacts. Members will be contacting ASU and inform the coordinators which contacts to receive the newsletter, JOC Performance Book, quarterly meeting minutes and all other CJE handouts.
4. Have business meeting available as an audio teleconference to members who cannot attend.	Ziad Al Sharmani	Next meeting	CJE will coordinate based on information provided by Ken Jayne on process used by CSA.
5. To present the 1999 CJE budget.	Ziad Al Sharmani	Next meeting	Clarify whether CJE is resource constrained.
6. To mail the current CJE newsletter.	Ziad Al Sharmani		The current CJE newsletter will be mailed out as soon as the CJE members provide a complete physical address for each of their contacts.
7. Refine website to improve access.	Ziad Al Sharmani	July 1999	Desire to improve ease and speed of access to popular items.
8. Definitize the "Certified Performance Based Contractor" criteria.	Bob Newberry	Next Meeting	Initial feedback next meeting. Assisted by Ken Jayne and Rex Shaver.
9. Identify and prepare list of conferences and seminars where CJE might give presentations.	Ziad Al Sharmani		Volunteers will be solicited to attend and use the Ken Jayne prepared presentation to potentially expand the market.

