

**DRAFT
FOR COMMITTEE DISCUSSION**

 Lake County Policy	3.8 Job Order Contract (JOC) Policy
	Approved by the County Board on:

1. Purpose and Intent

- 1.1 The purpose and intent of this policy is to provide clear guidance on the execution and reporting requirements for the Job Order Contract (JOC) program.

2. Background

- 2.1 The JOC is a competitively bid, multiple source, firm fixed price / indefinite quantity construction contract procured in compliance with the Lake County Purchasing Ordinance.
- 2.2 The JOC program is intended for small to medium, simple, repetitive, and easily defined maintenance, repair, and minor renovation projects, of which the scope aligns transparently with the pre-priced catalog.
- 2.3 The JOC program shall not be used for large, complex or new construction projects that require extensive design.
- 2.4 The current JOC was approved on July 9, 2019 and is a 12-month contract with four additional one-year terms.
- 2.4.1 The value per contractor per year is \$50,000 guaranteed minimum with \$2,000,000 potential maximum. Total potential maximum of the JOC program with the three JOC contractors is \$6,000,000.
- 2.4.2 Contractors and sub-contractors must meet criteria established in the contract.
- 2.5 Lake County established an internal policy in June 2019 for JOC Project Guideline and Project Development Protocol that the Finance and Administrative Committee should be advised of projects anticipated to exceed the threshold of \$350,000.

3. Scope

- 3.1 This policy applies to the execution and management of the Lake County Government JOC.

4. Authority

- 4.1 The Authority as stated in *3.1 Finance policy, Section 4* applies.

5. Policy

- 5.1 All JOC project task orders exceeding a threshold of \$350,000 require notification of the Finance and Administrative Committee prior to project task order execution.

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- 5.2 All JOC project task orders exceeding \$1,000,000 require approval of the Finance and Administrative Committee (formal committee action) prior to project task order execution.
- 5.3 The County Administrator through the Director of Facilities and Construction Services shall provide the following:
- 5.3.1 An annual report to the Finance and Administrative Committee in the first quarter of the fiscal year on the execution and administration of the JOC in the prior fiscal year.
 - 5.3.2 An annual presentation prior to the fiscal year start to the Finance and Administration Committee of the Job Order Contract procurement strategy for all planned projects exceeding \$350,000 to include project data, estimated costs, and projected award dates.
 - 5.3.3 A quarterly status report to the Finance and Administration Committee of the Job Order Contract to include number of job orders executed, value of job orders, and value of job orders subcontracted to local, small and minority owned businesses. Until such time that a formal certification program is mandated, reporting of small and minority owned businesses will be self-reported, not confirmed by County staff, and provided as informational only.
- 5.4 This policy shall be reviewed annually with any recommended amendments brought to the Finance and Administrative Committee.
- 5.5 Progress reports shall be provided to the Finance and Administrative Committee as the County Administrator deems appropriate.
- 5.6 This policy shall be reviewed by County Administration and the Finance and Administrative Committee prior to the approval of any new or amended JOC.

6. Severability

- 6.1 If any section or provision of this document should be held invalid by operation of law, none of the remainder shall be affected.

7. Non-Discrimination

- 7.1 Lake County prohibits the discriminatory application, implementation, or enforcement of any provision of this policy on the basis of race, color, sex, age, religion, disability, national origin, ancestry, sexual orientation, marital status, parental status, military discharge status, source of income, gender identity housing status, or any other protected category established by law, statute, or ordinance.

Policy History			
Version	Date Adopted	Legistar Item #	Notes
Original			--