

Memorandum

To: DEPUTY DIRECTORS
DISTRICT DIRECTORS
DIVISION CHIEFS

Date: July 11, 2024

From: DONNA BERRY
Deputy Director
Project Delivery  07/15/2024

Subject: IMPLEMENTATION OF INTEGRATED CONSTRUCTION CONTRACT STANDARDS PUBLICATION

This memorandum is an update to the new publication process for Construction Contract Standards (Standards). The Standards include Standard Specifications, Standard Plans, Standard Special Provisions, and Standard Bid Items. This memorandum supersedes the same subject memorandum dated November 5, 2021.

In 2015, a value analysis study was initiated to examine the Standards development and publication processes. The study recommended a comprehensive list of process improvement items, the majority of which were implemented between 2016 and 2018. One recommended improvement called for the elimination of the Revised Standard Specifications (RSS) and replacing the printed Standards with an integrated electronic Standards publication. To effectively implement this recommendation, a subsequent process improvement study was conducted in 2019 to develop a detailed implementation plan of an integrated standards publication. The implementation plan was presented to key department staff, headquarters and district management, and the construction industry. The recommended plan received overall acceptance from all.

The major benefits of the process improvements will be: (1) saving of natural resources by eliminating paper copies, (2) saving staff resources that would have been expended in printing, storage, and distribution of printed Standards, and (3) creating a user-friendly format for customers with the elimination of the RSS.

Effective October 24, 2022, a new Standards has been published on an annual basis and in an electronic format only. Starting October 21, 2024, a new 2024

Standards edition and subsequent updated annual Standards will be published in accordance with the following schedule:

- (1) A full set of Standards will be published in October of each year.
- (2) Mid-cycle publication of revised Standard Special Provisions (SSP), Revised Standard Plans (RSP), and/or Bid Items will be published in April of each year beginning April 2025.

OCCS will make the updated Standards available on its intranet site for preview purposes 3 months prior to the implementation date. The implementation of these Standards (incorporated into the advertised construction contracts) will occur on the following schedule:

- (1) Annual Standards edition - Monday following the third Friday in October of each year.
- (2) Mid-cycle Standards updates - Monday following the third Friday in April of each year.

Projects submitted to the Division of Engineering Services, Program/Project Management, and Office Engineer (PPM-OE) for advertisement on or after the implementation date will be required to incorporate the updated Standards. All on-system projects advertised, awarded, and administered by others with complete encroachment permit application packages submitted to a Caltrans district on or after the implementation date will be required to incorporate the updated Standards.

The updated Standards will be available on the OCCS internet site on the implementation date.

This process does not apply for approved special postings due to legal and/or safety related changes. If such changes impact current Standards, updates will be implemented immediately upon publication on the OCCS internet site.

If you have any questions about the implementation of Construction Contract Standards, please contact Mohsen Sultan, Chief, Office of Construction Contract Standards, Division of Design at (916) 715-6808.

DEPUTY DIRECTORS et al.

July 11, 2024

Page 3

c: Design Management Board
Program/Project Management Board
Construction Management Board
Construction Contract Standards Steering Committee
Paul Chung, Deputy Division Chief, Division of Design
Mohsen Sultan, Chief, OCCS, Division of Design