Jeff Drury
Sr. Director
Jeff@choicepartners.org
713.696.0786

Joann Nichols
Assistant Director
joann@choicepartners.org
713.696.2122

Stephen Kendrick
Sr. Mgr. Facility Planning
Skendrick@hcde-texas.org
713.696.8252

Steve Gibson
Contract Manager
steve@choicepartners.org
713.681.6052

Michael Robles
Contract Manager
michael@choicepartners.org
713.316.4254

Janet Wachs
C.E. Asst. Director
janet@choicepartners.org
713.696.1379
AGENDA

PART 1 (10 a.m. to 11:00 a.m.)

10:00 to 10:15 a.m.
Welcome and Introduction
Choice Partners Cooperative

10:15 to 10:30 a.m.
Legal Requirements,

10:30 to 10:45 a.m.
Growing Your Business

10:45 to 11:00 a.m.
eBid introduction

PART 2 (11:00 a.m. to 12:30 p.m.)

11:00 to 12:00 p.m.
Job Order Contracting

12:00 to 12:15 p.m.
Q & A

12:15 -12:30 p.m.
Closing
WELCOME

Jeff Drury
Senior Director of Choice Partners

Contract is broader than HCDE

School districts, charter schools, counties, municipalities, colleges, universities

WIN – WIN – WIN

How can we help you?
HCDE, A GOVERNMENTAL ENTITY

Harris County Department of Education

HCDE is located in Harris County, Texas; it is not a County agency.

HCDE is a governmental agency serving Harris County schools since 1889.

Taxing Authority
LEGAL REQUIREMENTS
Choice Partners provides legally-procured contracts

| Local Government Code 271 - Purchasing & Contracting Authority of Municipalities, Counties, other Government |
| Education Code Ch. 44 - Procurement (All construction, with the exception of Performance Contracts, is in Code 2269) |
| Government Code 791 – Interlocal Cooperative Contracts |
| Government Code 2269 Construction Procurement for all government (except Higher Ed.) |
| Local Gov’t Code 252/262 Purchasing & Contracting Authority of Municipalities, Counties, other Government |
| 24 CFR 85.36 Housing and Urban Development |
| EDGAR/Uniform Guidance (2 CFR 200) |
| HB 1295 |
| TEC 51.9335 Higher Education |
LEGALLY PROCURED CONTRACTS

WHY IS THAT IMPORTANT?

- Repeat business
- Dollar thresholds of local government entity
- Satisfies requirement for procurement process (TEC 44.031(a) and others)
- Single award to sell to multiple entities
- Less bids/RFPs to respond to
- Not-to-exceed pricing applies to all members
- At members discretion
WHY YOUR GOV’T CUSTOMERS ARE USING COOPERATIVE PURCHASING

- Reduce the number of bids to prepare, issue, and monitor
- Appropriate for many needs (but not all)
- Labor in preparing bids/RFPs can be used elsewhere
- Shift procurement cost (and risk) to the cooperative
- 90-days is average time for RFP from development to award. 45-60 for a bid
- Flexibility and convenience to work with the vendors on established pricing and better discounts
- Cooperative Purchasing authorized by Texas Gov’t Code 791, LGC 271, TEC 44.031(a) and others
GROWING YOUR BUSINESS

- Where do you begin? What is your target?
- Members vs. nonmembers?
- Get referrals from existing members including within the same organization.
- Can you collaborate with a Choice Partners contract holder?
Register to Become a CP Vendor

Become a Vendor

To be awarded a contract within HCDE Choice Partners Cooperative, vendors must follow these few simple steps:

1. **Register as a supplier in the eBid System** - you only become a BIDDER not an awarded vendor
2. Respond to a specific bid or proposal advertised by HCDE/Choice Partners
3. Be awarded a contract by the HCDE Board of Trustees
Vendor Login

If you have a contract awarded by Choice Partners, you may log-in below to view partner resources and current RFPs.

If you do not have a contract awarded by Choice Partners and want to view current RFPs or respond to an RFP, log-in below with your username and password. If you do not yet have a log-in, click on Set Up New Account below.

Helpful Links

Set Up a New Account
Forgot your password? Click here to reset password, then close the popup window to login on this page again.
Vendor Dashboard

Welcome Jeff Drury

If you are a Choice Partners vendor with a legal, competitively bid contract awarded by the HCDE governing board, you will have access to information just for awarded contract partners. If not, you will only see the eBid tab.

After being awarded, you may:
- View your contract information page, as members see it
- Access the list of members
- Login to eBid system
- Get Marketing Resources with seal and guidelines
- See Bond results

Please contact your contract manager or call 877-696-2122 for help and information you need.
Vendor Dashboard

Welcome Admin Admin

As a Choice Partners vendor with a legal, competitively bid contract awarded by the HCDE governing board, you will have access to information just for awarded contract partners.

You may:
- View your contract information page as members see it
- Access the list of members
- Login to eBid system

Please contact your contract manager or call 877-696-2122 for help and information you need.

View Vendors
Search vendors by name, contract title, or contract number.

View Members
Search members by name, type, state, and region.

Marketing Resources
Find marketing tips, conference/membership lists, reporting tools, and more.

Partners Messages
Get latest vendor news and view new members.

eBid
Go to eBid and view/respond to current bids.

RECENT ACTIVITY

2020 April Press Release
April 20, 2020

February 2020 Press Release
March 5, 2020

EVENTS

TASBO Annual Conference
March 2, 2020

Texas Library Association
March 24, 2020

CMAT
March 31, 2020
VENDOR CONTACT INFORMATION

**Balfour Company**

**Contract Category:** Graduation Items, Yearbooks & Commemorative Items  
**Contract Number:** 18/012KC-01  
**Contract Terms:**  
Initial Award Date: February 27, 2019  
1st Renewal Start Date: February 27, 2020  
Current Expiration Date: February 26, 2021  
Renewal Options Remaining: 2  
**CP Contract Manager:**  
Steve Gibson  
steve@choicepartners.org  
713-681-6052

**Contract Partner:** Balfour Company

**Contract Partner Web Site:** http://www.asjackets.com  
**Approved Market Area:** National

---

**CONTACT INFO**

For SALES  
**Butch Milks**  
8525 Westland West Blvd  
Houston, Texas 77041  
Phone: 832-912-8000  
Cell Phone: 713-882-3222  
Fax: 832-912-8005  
butchm@balfourhouston.com

For SALES  
**Matt Milks**  
8525 Westland West Blvd.  
Houston, Texas 77041  
Phone: 832-912-8000  
Fax: 832-912-8005  
mattm@balfourhouston.com

For SALES  
**Butch Milks**  
8525 Westland West Blvd.  
Houston, Texas 77041  
Phone: 832-912-8000  
Fax: 832-912-8005  
butchm@balfourhouston.com
**Facilities Sources**

**Contract Category:** Construction-JOC (JOC-ID-IQ)

**Contract Number:** 16/054.JN-04

**Contract Terms:**
- Initial Award Date: August 16, 2016
- 1st Renewal Start Date: August 16, 2018
- 2nd Renewal Start Date: August 16, 2019
- Current Expiration Date: August 16, 2020
- Renewal Options Remaining: 1

**CP Contract Manager:**
Joann Nichols
joann@choicepartners.org
719-696-2122

**Contract Partner:** Facilities Sources

**Contract Partner Web Site:**
http://www.facilitiesources.com

**Approved Market Area:** TX

**APPROVED PRODUCT OR SERVICE:** Maintenance, repair, alteration, renovation, remediation, or minor construction of a facility when the work is of a recurring nature but the delivery times, type and quantities of work are indefinite.

**TO PLACE AN ORDER:** Contact the vendor for all your pricing needs, stating you are using CP contract and send us the confirmation only Purchase Order copy

**PRICING:** Coefficient on file. Email confirmation copies of all PO’s to ecatalog@choicepartners.org

**Freight Terms:** N/A

**HUB Status:** Yes

**MWBE Status:** No

**SBE Status:** Yes

**DUE DILIGENCE:** Download

**ABOUT THIS PARTNER:**
With specialty licenses for electrical, mechanical and plumbing services, DPFS, Ltd. is able to efficiently coordinate all phases of construction, providing maximum productivity, quality and safety to its customers. This unique combination of services under one roof means one team is efficiently completing the job, ensuring maximum productivity and quality, at the least possible price, adding to customer satisfaction. Dura Pier Facilities Services foundation for success is the ability to plan and manage projects within budgets and within demanding schedules.
Marketing Resources

Your Marketing Resource Center

Choice Partners wants to work with all contract holders to help expand and grow your business, using your Choice Partners awarded contract. Please let your contract manager or the HCDE Client Engagement (713-696-1379) know how we can help.

Contract holders may use their contract for the region (ESC region map) or state it was proposed and awarded. While contract use is NOT limited to Texas, good resources for Texas government may be found in the tips to market to government entities document and a quick reference list of member entities is here. Quick List of current vendor contracts list here.

Become a Featured Vendor

After you have used your Choice Partners contract and have several satisfied customers, you may request to be a featured vendor. Client Engagement will
FEATURED VENDOR

Become a Featured Vendor

- Have 3+ members (not from same entity) that have used your contract and are satisfied. They must be willing to be interviewed and quoted.
- Complete request form found on Marketing Resources page and return to contract manager.
- Be interviewed by Client Engagement and your contract manager. CE will interview contacts.
- Vendor to review article before release.

The article will be published in the Leader's Choice newsletter sent electronically to members and vendors on a monthly basis. The publication is posted on the CP website with a web banner plus a link to the story and distributed by field reps and conference exhibit booth staff.
MEMBER CONTACT LIST

Vendor must:
- display Choice seal on your website home page (or landing page);
- link CP seal on vendor website to vendors page within Choice website; and
- provide proposed marketing material to be used with the list for review.

Client Engagement will:
- review the language of your marketing email to reflect vendor status; and
- provide a contact list of members.

Ask your contract manager to provide you the contact request form link after you complete the three items at top.
• Members select a category of contract.
• Then select desired vendor(s).
• Member describes product/service to be quoted.
• Member enters date product/service is needed.
• Options available to upload photos/specifications.
• NOTE: Vendors must respond to quote request within 48 hours.
FAQ’s

Frequently Asked Questions

Q: 0. What is Harris County Department of Education?
A: Harris County Department of Education is a governmental entity. Created in 1889, HCDE provides educational services for school districts and learners of all ages. It is located in Harris County but is not part of the governmental entity of Harris County, Texas. See attorney letter here.
See the benefits for membership to learn more.

Q: 1. What is Choice Partners?
A: Choice Partners was created by the merger of three Harris County Department of Education procurement cooperatives, Choice Facility Partners, Gulf Coast Food Co-op and HCDE Purchasing Cooperative. Choice Partners is a national cooperative purchasing service with legally procured contracts. Using these contracts streamlines purchasing, saving time and money for governmental organizations and nonprofits. A division of Harris County Department of Education, organizations in Texas that want to use these competitively bid and legally awarded contracts, sign an interlocal, government-to-government contract. Organizations outside Texas may just sign up and follow their state procurement laws.

Q: 2. Who is eligible to use Choice Partners?
A: Schools, colleges, universities, municipalities, counties, state agencies and other governmental entities, and nonprofits may join and use Choice Partners contracts. Private schools and higher education organizations that operate as nonprofit organizations may also become members.
<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joann Nichols, RTSBA</td>
<td>Assistant Director/Construction &amp; Commodities</td>
<td>877-696-2122</td>
</tr>
<tr>
<td>Trisha Prestigiacomo, RTSBA</td>
<td>Assistant Director/Food</td>
<td>713-696-0742</td>
</tr>
<tr>
<td>Stephen Kendrick, RTSBA</td>
<td>Sr. Mgr. Facility Planning</td>
<td>713-696-8252</td>
</tr>
<tr>
<td>Krist Nichols, RTSBA</td>
<td>Contract Manager</td>
<td>713-696-1337</td>
</tr>
<tr>
<td>Michael Robles, RTSBA</td>
<td>Contract Manager</td>
<td>713-316-4254</td>
</tr>
<tr>
<td>Monsign Joseph</td>
<td>Contract Manager</td>
<td>713-316-4259</td>
</tr>
<tr>
<td>Steve Gibson</td>
<td>Contract Manager</td>
<td>713-681-6052</td>
</tr>
<tr>
<td>Laura Sprue</td>
<td>Contract Manager/Food</td>
<td>713-696-8213</td>
</tr>
<tr>
<td>Melissa Wilder</td>
<td>Contract Coordinator/Food</td>
<td>713-696-8209</td>
</tr>
<tr>
<td>Emily Maldonado</td>
<td>Contract Assistant/Food</td>
<td>713-696-8243</td>
</tr>
<tr>
<td>Janet Wachs</td>
<td>CE Asst. Director</td>
<td>920-251-1097</td>
</tr>
<tr>
<td>Jan Arnold, CPA</td>
<td>Client Services Manager</td>
<td>713-696-0746</td>
</tr>
<tr>
<td>Mary Causey, MS, RTSBA</td>
<td>Contract Compliance Specialist</td>
<td>713-696-8270</td>
</tr>
<tr>
<td>Cora Day</td>
<td>Contract Coordinator</td>
<td>713-696-8208</td>
</tr>
<tr>
<td>Arita Kyle, CTSHO</td>
<td>Contract Specialist</td>
<td>713-696-8241</td>
</tr>
<tr>
<td>Yonne Johnson, CTSHO</td>
<td>General Office Clerk II</td>
<td>713-696-1886</td>
</tr>
<tr>
<td>Kay Vorish, CTSHO</td>
<td>Contract Assistant</td>
<td>713-696-0743</td>
</tr>
<tr>
<td>Shandra Powell</td>
<td>Clerk - General Office</td>
<td>713-696-1389</td>
</tr>
<tr>
<td>Fred Calhoun</td>
<td>Field Representative</td>
<td>713-203-5365</td>
</tr>
<tr>
<td>Ann Marie Harbour</td>
<td>Field Representative</td>
<td>817-703-7901</td>
</tr>
<tr>
<td>Jeff Druv, RTSBA</td>
<td>Sr. Director</td>
<td>713-696-0786</td>
</tr>
</tbody>
</table>
ACTION ITEMS AND TAKEAWAYS

• Register to become a vendor.
• Watch for evite to respond to RFP (request for proposal).
• Review Vendor Dashboard.
• Review Market Resources Page.
eBid
Vendor Dashboard

Welcome Jeff Drury

If you are a Choice Partners vendor with a legal, competitively bid contract awarded by the HCDE governing board, you will have access to information just for awarded contract partners. If not, you will only see the eBid tab.

After being awarded, you may:
- View your contract information page, as members see it
- Access the list of members
- Login to eBid system
- Get Marketing Resources with seal and guidelines
- See Bond results

Please contact your contract manager or call 877-696-2122 for help and information you need.

eBid
Go to ebid and view/respond to current bids

RECENT ACTIVITY

2021 February Press Release
March 25, 2021

2021 January Press Release
January 27, 2021

EVENTS

TASBO Marketplace and Annual Conference
December 11, 2020

CP Member Workshop (Virtual with registration)
April 14, 2021

TAPPA 2021 (Virtual Conference)
April 26, 2021
Vendor Login

If you have a contract awarded by Choice Partners, you may log-in below to view partner resources and current RFPs.

If you do not have a contract awarded by Choice Partners and want to view current RFPs or respond to an RFP, log-in below with your username and password. If you do not yet have a log-in, click on **Set Up New Account**.

Below.

**Helpful Links**

- [Set Up a New Account](#)
- [Forgot your password? Click here to reset password](#), then close the popup window to login on this page again.
HCDE Cooperatives Terms and Conditions

HARRIS COUNTY DEPARTMENT OF EDUCATION eBID WEB SITE USAGE AGREEMENT

This Agreement (the Agreement) is between Harris County Department of Education (“HCDE”), you, and, if you are registering on behalf of an entity, the entity. You and any entity you are registering on behalf of shall collectively be referred to as the (“Vendor”).

IF YOU ARE REGISTERING AS A BUSINESS ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND THE ENTITY TO THIS AGREEMENT.

This registration enables the Vendor to make application for placement on HCDE’s Vendor list and if approved as a Vendor, to receive Solicitation Notices, compile and submit Solicitation Responses, and view tabulated results of Solicitation Responses through the use of HCDE’s on-line eProcurement and Vendor Management System (“the HCDE eBid system”), which is hosted by Ion Wave Technologies, Inc. (“IWV”), (see http://www.Ionwave.net), using IWV Software. The website through which the HCDE eBid system is accessed is hereinafter referred to as the “HCDE eBid Web Site”.

I Accept the HCDE Cooperatives Terms and Conditions

[Printer-Friendly Version]
Dear Supplier,

Please click the link below to verify your email address and continue the registration process. As you will be automatically saved and can be accessed at any time by clicking this link.

[Click Here to Continue Registration]

This link will expire in 14 days. If you have not completed your registration during this time period, it will be deleted.

Questions about this system can be directed to:
Harris County Department of Education
Email: ebids@hcde-texas.org
Special Classifications

Save and Next

Check any special business classifications that apply to your business; if none, then check "None Apply". Classifications are subject to app

General Classifications

☐ HUB - Texas Statewide Historically Underutilized Business Program

☐ Minority-Owned Business

☐ Small Business Enterprise

☐ Woman-Owned Business

None Apply ☐ None of the above classifications apply to my business
https://hcdeebid.ionwave.net
Welcome to the HCDE eBid supplier portal!

This dashboard provides you with helpful alerts related to your activity on the system, including bid events closing soon and a list of opportunities you have been invited to. Simply click on the alert box to be taken to the appropriate area of the supplier portal. You can utilize the menu at the top to access all system functionality, including managing your supplier profile under ‘Admin’.

Helpful hints:

- Periodically review your Company Profile to ensure the information is accurate. Your Commodity Code selections will help determine the bid invitations you receive.
- Add additional user accounts or utilize a generic/shared email address on your user account to ensure your company receives notifications.
- Submit your bid early! Submitting early gives you time to correct mistakes in your response or to deal with Internet/computer problems.
- Whitelist the @customer.konwave.net email domain to ensure you receive email from our system.
<table>
<thead>
<tr>
<th>Bid Number</th>
<th>Organization</th>
<th>Title</th>
<th>Type</th>
<th>Issue Date</th>
<th>Close Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>21/038VR</td>
<td>HCDE Internal Purchasing</td>
<td>Workforce Certification Training for Harris County Department of Education Adult Education Division</td>
<td>Request for Proposal</td>
<td>3/23/2021</td>
<td>4/13/2021 02:00 PM (CT)</td>
</tr>
<tr>
<td>21/040SW</td>
<td>Choice Partners</td>
<td>Automotive Equipment, Tires, and Related Services</td>
<td>Request for Proposal</td>
<td>4/2/2021</td>
<td>4/27/2021 02:00 PM (CT)</td>
</tr>
<tr>
<td>21/039MR</td>
<td>Choice Partners</td>
<td>CSP for JOC - IDIQ Construction</td>
<td>Competitively Sealed Proposal</td>
<td>3/12/2021</td>
<td>4/20/2021 02:00 PM (CT)</td>
</tr>
<tr>
<td>21/042MI</td>
<td>Choice Partners</td>
<td>Moving, Storage and Related Items</td>
<td>Request for Proposal</td>
<td>4/2/2021</td>
<td>4/30/2021 02:00 PM (CT)</td>
</tr>
<tr>
<td>21/041LS</td>
<td>Choice Partners</td>
<td>Ice Cream Products</td>
<td>Request for Proposal</td>
<td>4/2/2021</td>
<td>5/3/2021 02:00 PM (CT)</td>
</tr>
<tr>
<td>21/046LS</td>
<td>Choice Partners</td>
<td>Site Based Pizza Program</td>
<td>Request for Proposal</td>
<td>4/9/2021</td>
<td>5/10/2021 02:00 PM (CT)</td>
</tr>
<tr>
<td>21/005IA-3</td>
<td>HCDE Internal Purchasing</td>
<td>CASE for Kids Content Area Services and Trainers</td>
<td>Request for Proposal</td>
<td>3/22/2021</td>
<td>5/18/2021 02:00 PM (CT)</td>
</tr>
<tr>
<td>21/029IA</td>
<td>HCDE Internal Purchasing</td>
<td>Early Head Start Child Care Partnership</td>
<td>Request for Proposal</td>
<td>3/22/2021</td>
<td>5/18/2021 02:00 PM (CT)</td>
</tr>
<tr>
<td>21/004LS-3</td>
<td>HCDE Internal Purchasing</td>
<td>CASE for Kids Youth Services for Afterschool and Summer</td>
<td>Request for Proposal</td>
<td>2/4/2021</td>
<td>6/22/2021 02:00 PM (CT)</td>
</tr>
</tbody>
</table>
Edit Bid Response - 21/039MR

Bid Number: 21/039MR (CSP for JOC - IDIQ Construction)
Close Date & Time: 4/30/2021 02:00:00 PM (CT)
Time Left: 17 days 22 hours 26 minutes 24 seconds
Response Status: NOT SUBMITTED - To complete your response, you must click 'Submit Response' in the Response Submission tab.

Bid Information

- Bid Type: Competitively Sealed Proposal
- Issue Date & Time: 3/12/2021 03:26:02 PM (CT)
- Close Date & Time: 4/30/2021 02:00:00 PM (CT)
- Bid Status: Issued
- Question Cutoff Date: 4/23/2021 02:00:00 PM (CT)
- Bid Notes: Job Order Contracting IDIQ (Indefinite Delivery Indefinite Quantity) Minor Construction, Maintenance, Repair, Alteration, Renovation and Remediation Services

Bid Contact Information

- Workgroup: Choice Partners
- Contact Name: Michael Robles
- Address: 6005 Westview Drive
  Houston, TX 77055 USA
- Department: Choice Partners
- Building: NPO
- Floor/Room: 2016
- Contact Phone: (713) 3164254
- Contact Email: mrobles@hode-texas.org

Ship to Information

No Ship to Information

Bill to Information

No Bill to Information
NOT SUBMITTED - To complete your response, you must click 'Submit Response' in the Response Submission tab.

**Question Cutoff Date:** 4/23/2021 02:00 PM (CT)

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Factors Item 5, page14, Vendor’s safety record, including current OSHA safety report. Please specify what does it mean the Vendor’s safety record?</td>
<td>This is your company’s safety plan and how safety is handled while on the job site.</td>
</tr>
</tbody>
</table>

**Submitted:** 3/30/2021 07:23:08 PM (CT)
**Edit Bid Response - 21/039MR**

- **Bid Number**: 21/039MR (CSP for JOC - IDIQ Construction)
- **Close Date & Time**: 4/30/2021 02:00:00 PM (CT)
- **Time Left**: 17 days 21 hours 40 minutes 31 seconds
- **Response Status**: *NOT SUBMITTED - To complete your response, you must click 'Submit Response' in the Response Submission tab.*

### Event Activities

<table>
<thead>
<tr>
<th>Activity Date</th>
<th>Activity Time</th>
<th>Activity Type</th>
<th>Activity Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/12/2021</td>
<td>9:00 AM (CT)</td>
<td>Participation</td>
<td>1st Advertisement</td>
</tr>
<tr>
<td>3/15/2021</td>
<td>9:00 AM (CT)</td>
<td>Participation</td>
<td>2nd Advertisement</td>
</tr>
<tr>
<td>3/25/2021</td>
<td>10:00 AM (CT)</td>
<td>Participation</td>
<td>Pre-Proposal Meeting (Optional)</td>
</tr>
<tr>
<td>3/25/2021</td>
<td>11:00 AM (CT)</td>
<td>Participation</td>
<td>RS MEANS Beginner Training (Optional)</td>
</tr>
<tr>
<td>4/30/2021</td>
<td>2:00 PM (CT)</td>
<td>Participation</td>
<td>Proposal Closes</td>
</tr>
<tr>
<td>7/21/2021</td>
<td>2:00 PM (CT)</td>
<td>Participation</td>
<td>Anticipated Board Award</td>
</tr>
</tbody>
</table>
**Edit Bid Response - 21/039MR**

<table>
<thead>
<tr>
<th>Bid Number</th>
<th>21/039MR (CSP for JOC - IDIQ Construction)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Date &amp; Time</td>
<td>4/30/2021 02:00:00 PM (CT)</td>
</tr>
<tr>
<td>Time Left</td>
<td>17 days 21 hours 39 minutes 40 seconds</td>
</tr>
<tr>
<td>Response Status</td>
<td>NOT SUBMITTED - To complete your response, you must click 'Submit Response' in the Response Submission tab.</td>
</tr>
</tbody>
</table>

**Bid Attachments**

<table>
<thead>
<tr>
<th>#</th>
<th>Download</th>
<th>File Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Download</td>
<td>Lump Sum Estimate Example.pdf (410 KB)</td>
<td>Lump Sum Estimate Example.</td>
</tr>
<tr>
<td>3</td>
<td>Download</td>
<td>CP Cooperative Member List _FEBRUARY Web 2021.pdf (228 KB)</td>
<td>Membership list as of February 2021.</td>
</tr>
<tr>
<td>4</td>
<td>Download</td>
<td>21039MR Job Order Contracting IDIQ.pdf (561 KB)</td>
<td>This is the complete CSP with instructions. Please read completely before asking questions.</td>
</tr>
</tbody>
</table>
**Bid Attributes**

<table>
<thead>
<tr>
<th>#</th>
<th>Attribute</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Company Name</td>
<td>Please provide your company name.</td>
</tr>
<tr>
<td>2</td>
<td>Company Street Address</td>
<td>Please provide your company street address.</td>
</tr>
<tr>
<td>3</td>
<td>Company City</td>
<td>Please provide your company city.</td>
</tr>
<tr>
<td>4</td>
<td>Company State</td>
<td>Please provide your company state.</td>
</tr>
<tr>
<td>5</td>
<td>Company Zip Code</td>
<td>Please provide your company zip code.</td>
</tr>
<tr>
<td>6</td>
<td>Company Phone</td>
<td>Please provide your company phone number.</td>
</tr>
<tr>
<td>7</td>
<td>Company Website</td>
<td>Please provide your company’s website address. A website is mandatory for consideration with this proposal. This should be a page that describes the products/services for which you were awarded the contract - if you have many products/services not within the award, it is best to create a unique landing page for our members.</td>
</tr>
<tr>
<td>#</td>
<td>Specification</td>
<td>Quantity</td>
</tr>
<tr>
<td>----</td>
<td>------------------------------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>1</td>
<td>Coefficient to be used with the RSMeans unit price book for regular hours as defined in the CSP.</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td><strong>Item Note:</strong> This is not to exceed price. This one will be used with the RSMeans online data set. This shall be less than 1.0 to give our members best value.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Coefficient for RSMeans online - after hours and overtime hours</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>Coefficient for National Construction Estimator book by Craftsman</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td><strong>Item Note:</strong> This will be more than 1 and usually between 1.15 and 1.25</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Coefficient for overtime hours for the National Construction Estimator book by Craftsman</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td><strong>Item Note:</strong> This is normally over 1.25 but below 1.35</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>This is the coefficient to be used with the Sierra West Publishing UPB.</td>
<td>1</td>
</tr>
<tr>
<td>6</td>
<td>Coefficient to be used with Xactimate UPB</td>
<td>1</td>
</tr>
<tr>
<td>7</td>
<td>Usual and customary mark up for any non-pre-priced items that may come up. This is not a coefficient. It is a percent mark up of actual cost.</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td><strong>Item Note:</strong> This is normally between 10 and 20%. For best value, we recommend 10%.</td>
<td></td>
</tr>
</tbody>
</table>
Requested Attachments

1. **Section 10.0 Attachments**
   - Upload the completed, executed, dated, and electronically signed (e.g., DocuSign) or wet signature documents. If a wet signature is used, the original must be mailed or hand-delivered. Include/upload these items may result in non-award.
   - Click "Upload" to select file

2. **Form 1295**
   - Upload your certified, signed, and notarized form here.
   - Click "Upload" to select file

3. **Insurance Coverage**
   - Attach your most recent insurance coverage that meets the requirements as stated in section 5.44 of the CSP Document.
   - Click "Upload" to select file

4. **Company Logo**
   - Attach your company logo in JPG format.
   - Click "Upload" to select file

5. **HUB/MWBE/SDI etc. Certifications**
   - Attach any HUB or M/WBE, or other Certifications your company may hold.
   - Click "Upload" to select file

6. **Marketing Plan**
   - How will you market your contract with HCDE/Choice Partners?
   - Click "Upload" to select file

7. **Safety Plan**
   - Include your Safety Plan here.
   - Click "Upload" to select file

8. **Surety Letter**
   - This should show the surety bonding capacity.
   - Click "Upload" to select file

9. **Give us a RIMKMeans line item example using your suggested coefficient**
   - This will show us your demonstrated ability to perform job order contracting service estimating with the line item estimates that you attached here. Not attaching an example will result in non-award.
   - Click "Upload" to select file

10. **Quality Assurance/Quality Control (QA/QC) Program**
    - Attach your responses to Question 65 here.
    - Click "Upload" to select file
Supplier Response Summary

Save

Supplier Note to Buyer

Supplier Notes

Digital Signature

By submitting your response, you certify that you are authorized to represent and bind your company.

* Your Full Name: 

* Your Email Address: 

Submit Response
eBid

Edit Bid Response - 21/039MR

Bid Number: 21/039MR (CSP for JOC - IDIQ Construction)
Close Date & Time: 4/30/2021 02:00:00 PM (CT)
Time Left: 16 days 23 hours 11 minutes 30 seconds
Response Status: NOT SUBMITTED - To complete your response, you must click 'Submit Response' in the Response Submission tab.

88 validation error(s) present. Please review the following tabs:
- Attributes
- Line Items
- Response Attachments
- Response Submission

Supplier Response Summary

2 validation error(s) present
- Digital Signature: You must enter the full name of the individual responding to this event
- Digital Signature: You must enter the email address of the individual responding to this event
Objectives

Why JOC?

Maintenance vs. Construction

Concepts including Trade JOC & Quoting vs. Bidding

How to Legally Use a CP JOC Contract
Different procurement rules apply
- Contracts not properly procured can be voided or unenforceable
- Officials and officers who violate procurement statutes can be subject to criminal penalties

Public works contracts may trigger bonding and prevailing wage requirements

Legal mistakes can:
- DELAY projects
- Jeopardize budgets and result in cost-overruns
- Subject gov’t entity to financial liability to vendors & subcontractors
• **Time & Materials**

If providing **construction services**

• **Only** method allowed to select contractors for future, undefined projects [Texas Education Code 44.031 (a)](https://www.tamu-texmem.org/)
“A procurement method used for maintenance, repair, alteration, renovation remediation, or minor construction” of facilities “when the work is of a recurring nature, but the delivery times, types, and quantities of work required are indefinite.”

*Tex. Gov’t Code § 2269.401*
Factors to Consider

- **Like for like** – NOT new or upgraded
- Scale and complexity of project
- Physical size of object being worked on

JOC contract (TGC 2269)  
Repair & Maintenance

Maintenance Contract (TEC 44.031)  
Construction Services

OSHA Letter to Raymond Knobb (11.18.2003)
JOC’s procured by Purchasing Cooperatives

- Gov’t Entity selects vendor without having to use its own competitive procurement process
- ONLY satisfies the **procurement** requirement, NOT the **contracting** requirement
- Statute requires a written and signed job order between the vendor and the Gov’t Entity  TGC 2269.410(a)
- Only construction method that allows for use of a cooperative in lieu of self-procurement
- Only method allowed to select contractors for future, undefined projects or tasks
JOC/IDIQ – What’s an IDIQ/JOC Estimate?

- MUST contain:
  - CP Contract Number
  - Line item assessment based on Unit Price Book (UPB)
  - Localized by applying City Cost Index (CCI)
  - Legally bid coefficient

- Subcontractor pricing must be estimated using the UPB for ALL scope of work
<table>
<thead>
<tr>
<th>Quantity</th>
<th>LineNumber</th>
<th>Description</th>
<th>Unit</th>
<th>O&amp;P</th>
<th>Ext. Total O&amp;P</th>
<th>Labor Type</th>
<th>Data Release</th>
<th>CCI Location</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>236505100400</td>
<td>Central station air handler, up thru 15 ton, selective demolition</td>
<td>Ea</td>
<td></td>
<td>579.25$</td>
<td></td>
<td></td>
<td></td>
<td>Year 2019 Quarter 2 (Use most updated available at time quote is requested) TEXAS / HOUSTON (770-772)</td>
</tr>
<tr>
<td>1</td>
<td>237433101120</td>
<td>Rooftop air conditioner, single zone, electric cool, gas heat, 3 ton cooling, 60 MBH heating, includes, standard controls, curb and economizer</td>
<td>Ea</td>
<td>4,359.00$</td>
<td>4,359.00$</td>
<td>RR</td>
<td></td>
<td></td>
<td>TEXAS / HOUSTON (770-772)</td>
</tr>
<tr>
<td>3</td>
<td>237433101150</td>
<td>Rooftop air conditioner, single zone, electric cool, gas heat, 7.5 ton cooling, 170 MBH heating, includes, standard controls, curb and economizer</td>
<td>Ea</td>
<td>8,213.65$</td>
<td>24,640.95$</td>
<td>RR</td>
<td></td>
<td></td>
<td>TEXAS / HOUSTON (770-772)</td>
</tr>
<tr>
<td>1</td>
<td>237433101156</td>
<td>Rooftop air conditioner, single zone, electric cool, gas heat, 8.5 ton cooling, 170 MBH heating, includes, standard controls, curb and economizer</td>
<td>Ea</td>
<td>9,733.10$</td>
<td>9,733.10$</td>
<td>RR</td>
<td></td>
<td></td>
<td>TEXAS / HOUSTON (770-772)</td>
</tr>
<tr>
<td>2</td>
<td>237433101160</td>
<td>Rooftop air conditioner, single zone, electric cool, gas heat, 10 ton cooling, 200 MBH heating, includes, standard controls, curb and economizer</td>
<td>Ea</td>
<td>13,186.50$</td>
<td>24,373.00$</td>
<td>RR</td>
<td></td>
<td></td>
<td>TEXAS / HOUSTON (770-772)</td>
</tr>
<tr>
<td>1</td>
<td>237433101170</td>
<td>Rooftop air conditioner, single zone, electric cool, gas heat, 12.5 ton cooling, 230 MBH heating, includes, standard controls, curb and economizer</td>
<td>Ea</td>
<td>13,614.90$</td>
<td>13,614.90$</td>
<td>RR</td>
<td></td>
<td></td>
<td>TEXAS / HOUSTON (770-772)</td>
</tr>
<tr>
<td>2</td>
<td>237433101180</td>
<td>Rooftop air conditioner, single zone, electric cool, gas heat, 15 ton cooling, 270 MBH heating, includes, standard controls, curb and economizer</td>
<td>Ea</td>
<td>16,839.60$</td>
<td>33,679.20$</td>
<td>RR</td>
<td></td>
<td></td>
<td>TEXAS / HOUSTON (770-772)</td>
</tr>
<tr>
<td>100</td>
<td>239100100550</td>
<td>Pre-reinforced, pre-painted, sid. condenser. fiberglass reinforced concrete with polystyrene foam core, 3&quot; thick, 20&quot; x 38&quot;</td>
<td>Ea</td>
<td>94.70$</td>
<td>9,470.00$</td>
<td></td>
<td></td>
<td></td>
<td>TEXAS / HOUSTON (770-772)</td>
</tr>
<tr>
<td>1</td>
<td>015433602720</td>
<td>Rent crane truck mounted, hydraulic, 100 ton capacity, incl. Hourly Oper. Cost.</td>
<td>Week</td>
<td>9,856.76$</td>
<td>9,856.76$</td>
<td></td>
<td></td>
<td></td>
<td>TEXAS / HOUSTON (770-772)</td>
</tr>
</tbody>
</table>

Total RS Means Unit Cost Total $ 75,519.46 $ 135,561.41

Insert what you bid

Total with Coefficient (1.0 x RS Means Total) $ 135,561.41

Additional Discount of 10% good for current project only $ 122,005.27

2% Bond (Any additional Pass-Through Costs) $ 2,440.11

Total Project Quote $ 124,445.37

---

 HVAC Example

Vendor Name

Job Description

Choice Partners Contract #18/036MC-XX

Data Release: Year 2019 Quarter 2

---

RS Means Unit Cost Total $ 75,519.46 $ 135,561.41

Insert what you bid

Total with Coefficient (1.0 x RS Means Total) $ 135,561.41

Additional Discount of 10% good for current project only $ 122,005.27

2% Bond (Any additional Pass-Through Costs) $ 2,440.11

Total Project Quote $ 124,445.37
Review the JOC Quote

- CCI location
- Coefficient
- O & P Pricing
- Data release (most recent)

- Non pre-priced items
- Attempts to pass-through co-op fee
- Division 1
  - Adjustment Factors
WIN, WIN, WIN

Diagram:
- Choice Partners
- CP Member
- CP Awarded Vendor
  - Interlocal Agreement
  - Awarded Contract
  - P.O., Job Order and/or Contracted Services Agreement
Use A Master Job Order Contract

- Contains Gov’t Entity’s project specific Scope of Work
- Includes Job Order & Prevailing Wage Rate as Attachments
- Liquidated Damages
- Retainage
- Terms & Conditions Specific to Gov’t Entity
- Signed by Gov’t Entity & Vendor

“An order for a job or project under a job order contract must be signed by the government entity’s representative and the contractor.”

*Tex. Gov’t Code § 2269.410*
JOC / IDIQ – The JOB Order

- Owner/Gov’t Entity - issued
- Signed by both parties
- States scope of work and price of assigned tasks
- Provides Owner’s Adopted Prevailing Wage Rates
Public Works Bonds

- Performance bond required if contract is in excess of $100,000
  - Protects the Gov’t Entity from financial losses arising from default, material breach, termination or abandonment

- Payment bond required if a contract is in excess of:
  - $25,000 & the Gov’t Entity is not a municipality or a joint board
  - $50,000 and the Gov’t Entity is a municipality or a joint board
  - Protects the Gov’t Entity from claims for nonpayment of suppliers, subcontractors, and sub-subcontractors

*TEX. GOV’T CODE § 2253.021*
JOCs and Using an Architect or Engineer

• Gov’t Entity must independently hire A/E if services required
  \textit{TEX. GOV'T CODE § 791.011(j)}

• Architect required for:
  • A new building having construction costs exceeding $100,000
  • An alteration or addition having construction costs exceeding $50,000
  \textit{TEX. OCC CODE § 1051.703}

• Exceptions to Engineering Services:
  • An engineer is \textbf{NOT} required for a public work project if:
    • A project involving electrical or mechanical engineering will cost $\textbf{8,000 or less}$
    • A project not involving electrical or mechanical engineering will cost $\textbf{20,000 or less}$ (i.e., structural or civil)
  \textit{TEX. OCC CODE § 1001.053}
What Must Go to the Board?

- Determination of construction services project delivery method (if other than Competitive Sealed Bids).
- Approval of competitive procurement results, where procurement is required
- Approval of all Interlocal Contracts for cooperatives
- Approval of the contract with any vendor
- Approval of all contract amendments or change orders
- All contract renewals and contract terminations
- Governing Body may act to delegate all of the above powers (CH or CV Local for ISD’s)
- Job Orders (including cooperative purchases) in excess of $500,000
Trade JOC VS. JOC

• **Trade JOC**
  - Allows the use of one trade or division
  - Reduces overhead expenses when multiple trades are not needed to complete project

• **JOC**
  - Allows for the use of all divisions and is typically a general contractor

• **BID or PROPOSAL**
  vendor’s *formal, written, sealed response* that satisfies the state’s procurement requirements for a governmental entity.

• **QUOTE**
  vendor’s *job-specific price in writing* based on their previously bid and awarded contract coefficient and contract specified UPB.
JOC / IDIQ – Final Thoughts

- Establish procurement method with your vendor prior to them quoting the job
- Include contract number on quote and PO
- Verify pricing by requesting the vendor’s line item estimate with legally bid coefficient.
- If utilizing a coop, send a confirming copy of each JOC PO issued to Coop
- Not all coefficients are created equal
- Not all Co-ops are created equal, are in State, or are 2 CFR Part 200 (EDGAR) compliant
- Governing Body Approval
THE FOREGOING PRESENTATION WAS CREATED BY HARRIS COUNTY DEPARTMENT OF EDUCATION. THIS PRESENTATION IS INTENDED TO BE USED SOLELY FOR GENERAL INFORMATION PURPOSES AND IS NOT TO BE REGARDED AS LEGAL ADVICE. IF SPECIFIC LEGAL ADVICE IS SOUGHT, PLEASE CONSULT AN ATTORNEY

Stephen Kendrick, RTSBA
Sr. Manager of Facilities Planning
Office: 713-696-8252
Cell: 281-773-3036
skendrick@hcde-texas.org
Looking forward to working with you!
PRESENTERS

Jeff Drury  
Sr. Director  
Jeff@choicepartners.org  
713.696.0786

Joann Nichols 
Assistant Director  
joann@choicepartners.org  
713.696.2122

Stephen Kendrick 
Sr. Mgr. Facility Planning  
Skendrick@hcde-texas.org  
713.696.8252

Steve Gibson  
Contract Manager  
steve@choicepartners.org  
713.681.6052

Michael Robles  
Contract Manager  
michael@choicepartners.org  
713.316.4254

Janet Wachs  
C.E. Asst. Director  
janet@choicepartners.org  
713.696.1379
Contacts

CP Management
Jeff: jeff@choicepartners.org
Joann: joann@choicepartners.org
Trisha: trisha@choicepartners.org
Stephen: skendrick@hcde-texas.org

Contract Managers
Kristi: kristi@choicepartners.org
Laura: laura@choicepartners.org
Michael: michael@choicepartners.org
Monique: monique@choicepartners.org
Steve: steve@choicepartners.org

Contract Compliance
Mary: mary@choicepartners.org

Billing
Arlita: arlita@choicepartners.org
Emily: emily@choicepartners.org
Jan: jan@choicepartners.org
Kay: kay@choicepartners.org

Reporting
Facility: facilityreporting@choicepartners.org
Food: foodreporting@choicepartners.org
Supplies: supplyreporting@choicepartners.org

Marketing
Stephanie: sdelossantos@hcde-texas.org
Janet: janet@choicepartners.org
Contact Information

6005 Westview  |  Houston  TX 77055
Tel 713-696-0786 or 1-877-696-2122
www.choicepartners.org

Follow us:
www.twitter.com/choice_partners
www.linkedin.com/company/choice-partners

Email: info@choicepartners.org or jeff@choicepartners.org