The Right Resources. Right Now.
MEET THE CP STAFF
VENDOR ORIENTATION AGENDA

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

10:15 to 10:40 a.m.
Legal Requirements
Checklist
Food/Cafeteria Contracts

10:40 to 11:15 a.m.
Growing Your Business

11:15 a.m. to 12:15 p.m.
Job Order Contracting

12:15 -12:30 p.m.
Closing
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 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
THE 5 PILLARS WE SUPPORT
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 |
CONTRACTS

FOOD/CAFETERIA | TECHNOLOGY | COMMODITIES | SERVICES | FACILITIES
SUPPLY CATALOG ORDERING

- More than 1,100 line items competitively bid
- Single awards
- Catalog Discount Percentage also provided
- eCatalog system allows members to create quotes & place orders
CHECK LIST

AWARDED
PROCUREMENT
ADMIN FEE
REPORTING
INVOICING
# Choice Partners Monthly Reporting Form

When complete email to supplyreporting@choicepartners.org

<table>
<thead>
<tr>
<th>Vendor Name:</th>
<th>Month Ending:</th>
<th>Year:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Name of Person Submitting:</th>
<th>Email Address:</th>
<th>Date:</th>
</tr>
</thead>
</table>

**Please list the correct contract number for each entity’s sale**

<table>
<thead>
<tr>
<th>Dollar Amount</th>
<th>Member Name</th>
<th>Date</th>
<th>PO Number</th>
<th>Contract Number</th>
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</thead>
<tbody>
<tr>
<td>1</td>
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<tr>
<td>T</td>
<td>$0.00</td>
<td>TOTAL</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Reporting Template – J.O.C

## HCDE Completed Projects

<table>
<thead>
<tr>
<th>Entity/District</th>
<th>Vendor Job Number</th>
<th>Customer Name</th>
<th>Purchase Order Number</th>
<th>Work Description</th>
<th>Projected Comp. Date</th>
<th>Current Billing Amount</th>
<th>PO Amount</th>
<th>Bond/Permit Cost</th>
<th>Comments</th>
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</table>

## HCDE Active Projects

<table>
<thead>
<tr>
<th>Entity/District</th>
<th>Vendor Job Number</th>
<th>Customer Name</th>
<th>Purchase Order Number</th>
<th>Work Description</th>
<th>Physical % Complete</th>
<th>Current Billing Amount</th>
<th>PO Amount</th>
<th>Bond/Permit Cost</th>
<th>Comments</th>
</tr>
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</table>
# Choice Partners Monthly Reporting Form

When complete email to foodreporting@choicepartners.org

<table>
<thead>
<tr>
<th>Vendor Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Number:</td>
<td></td>
</tr>
<tr>
<td>Months:</td>
<td></td>
</tr>
<tr>
<td>Year:</td>
<td></td>
</tr>
</tbody>
</table>

| Name of Person Submitting: |  |
| Email Address: |  |
| Date: |  |

Please list the correct contract number for each entity’s sale

<table>
<thead>
<tr>
<th>$ Amount</th>
<th>Member Name</th>
<th>Date</th>
<th>PO #:</th>
<th>Contract #:</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>T $0.00</td>
<td>Total</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
FOOD / CAFETERIA CONTRACTS

- Bottled Drinking Water, and Coolers
- Chemical Products and Services
- Commercial Food Distributor
- Commodity Processing of USDA Foods
- Dairy Products
- Food Equipment, Parts, Repair, Installation, Maintenance, Small Wares, and Related Items
- Fresh Bread Products
- Fresh Produce
- Frozen and Chilled Beverages
- Ice Cream
- Pizza Delivery
- Snacks and Beverages
- Technical Services
- & Products for Food Service
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?
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 Admin Admin

As a Choice Partners vendor with a legal, competitively bid contract awarded by the RCOE 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
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
MARKETING REQUIRED

- Seal displayed on website home page *(or landing page)*
- Conference participation *(display seal)* – up to 5 events
- Development of strategic marketing plan – provide contract manager or Client Engagement

**OPTIONAL:** *(coordinate with us)*

- Ads in statewide publications
- Targeted emails
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 (713-686-1379) know how we can help.

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Download Choice Partner Seal

Contract holders are requested to use the Choice Partners seal to indicate that they have competitively bid and been awarded a government contract. Here are the guidelines for use of the seal.
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.
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.
Member Login

If you are already a member, select "Set Up a New Account" below and get your login so you have access to all the details of our contracts.

USERNAME

PASSWORD

LOGIN

Helpful Links

Set Up a New Account
Available Contracts
Forgot your password?
MEMBER DASHBOARD

Members Dashboard

Welcome

As a Choice Partners member, you can access information that saves you valuable time and money. Click on the areas to the right to make your selection.

You can:

- Get quick pricing quotes for your projects
- View available Contracts and Vendors
- Access our Supply Catalog and other pricing catalogs
- Download nutrition labels/commodity processing info.

For more information, contact our Assistant Director, Joann Nichols, or call 877-696-2122 for immediate assistance. Our goal is to support you in finding the right resources, right now!

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
DUE DILIGENCE / PARTNERSHIP

Facilities Sources

**Contract Category:** Construction-JOC (JOC-IDIQ)
**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.factoriesources.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.
• 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.
Events

SELECT AN EVENT

TML 2020 Annual Conference (Virtual) (October 14, 2020)

TML 2020 Annual Conference (Virtual)
(October 14 - 16, 2020)

Texas Municipal League 2020 Annual Conference
October 14-16, 2020
The 2020 TML Annual Conference and Exhibition will be held as a virtual event, offering the same great content and opportunities to connect with other city officials, speakers, exhibitors, and sponsors.
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.
Balfour Company

Contract Category: Graduation Items, Yearbooks & Commemorative Items

Contract Number: 19/012KC-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.aalljackets.com

Approved Market Area: National

Contact Info

For SALES
Butch Milks
8525 Westland West Blvd
Houston, Texas 77041
Phone: 832-912-8000
Cell Phone: 713-852-3222
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

Print Info.
STAFF CONTACT INFORMATION

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joanna headphones</td>
<td>Assistant Director/Construction &amp; Commodity</td>
<td>877-696-2122</td>
</tr>
<tr>
<td>Trisha Prestiagion</td>
<td>Assistant Director/Food</td>
<td>713-696-0742</td>
</tr>
<tr>
<td>Stephen Kendrick</td>
<td>Sr. Mgr. Facility Planning</td>
<td>713-696-8252</td>
</tr>
<tr>
<td>Krith Nisslir</td>
<td>Contract Manager</td>
<td>713-696-1337</td>
</tr>
<tr>
<td>Michael Rollins</td>
<td>Contract Manager</td>
<td>713-696-4259</td>
</tr>
<tr>
<td>Montez Joseph</td>
<td>Contract Manager</td>
<td>713-696-8213</td>
</tr>
<tr>
<td>Steve Gibson</td>
<td>Contract Manager</td>
<td>720-251-1097</td>
</tr>
<tr>
<td>Laura Sperle</td>
<td>Contract Manager/Food</td>
<td>713-696-0209</td>
</tr>
<tr>
<td>Melissa Wilder</td>
<td>Contract Coordinator/Food</td>
<td>713-696-8243</td>
</tr>
<tr>
<td>Emily Maionado</td>
<td>Contract Assistant/Food</td>
<td>713-696-0466</td>
</tr>
<tr>
<td>Janet Waechs</td>
<td>CE Asst. Director</td>
<td>713-696-8270</td>
</tr>
<tr>
<td>Jan Arnold</td>
<td>Client Services Manager</td>
<td>713-696-0208</td>
</tr>
<tr>
<td>Mary Caugher</td>
<td>Contract Compliance Specialist</td>
<td>713-696-8241</td>
</tr>
<tr>
<td>Carla Peay</td>
<td>Contract Specialist</td>
<td>713-696-8213</td>
</tr>
<tr>
<td>Patricia Byline</td>
<td>General Office Clerk II</td>
<td>713-696-1886</td>
</tr>
<tr>
<td>Key Varnish</td>
<td>Contract Assistant</td>
<td>713-696-0743</td>
</tr>
<tr>
<td>Shandria Powell</td>
<td>Clerk - General Office</td>
<td>713-696-1389</td>
</tr>
<tr>
<td>Anne Marie Harbour</td>
<td>Field Representative</td>
<td>817-705-7801</td>
</tr>
<tr>
<td>Jeff Drury</td>
<td>Sr. Director</td>
<td>713-696-0786</td>
</tr>
</tbody>
</table>
• Review Vendor Dashboard
• Review Market Resources Page
• Share how member can get login ID with your sales staff
• Contract managers have request forms for member contact lists
• If not a construction vendor, take following survey
Non-JOC Vendors ONLY:
Complete your survey at this time.
(YOUR FEEDBACK MATTERS!)
Objectives

- Why JOC?
- Maintenance vs. Construction
- Concepts including Trade JOC & Quoting vs. Bidding
- How to Legally Use a CP JOC Contract
Why Does Legal Compliance Matter?

- 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)1-8
“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*
JOC/IDIQ – Maintenance VS. Construction

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)
WIN, WIN, WIN
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>
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<tr>
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<td>236050100400</td>
<td>Central station air handler, up thru 15 ton, selective demobilization</td>
<td>Ea</td>
<td>$579.25</td>
<td>$5,792.50</td>
<td>RR</td>
<td>Year 2019 Quarter 2 (Use most updated available at time quote is requested)</td>
<td>TEXAS / HOUSTON (770-772)</td>
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<tr>
<td>1</td>
<td>237433101100</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>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
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<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>
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<td>Year 2019 Quarter 2</td>
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<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>
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<td>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
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<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>$12,186.50</td>
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<td>TEXAS / HOUSTON (770-772)</td>
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<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>
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<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>
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<tr>
<td>100</td>
<td>239110106050</td>
<td>Curbs/pads prefabricated, pad, condenser, fiberglass reinforced concrete with polystyrene foam core, 3” block, 20” x 30”</td>
<td>Ea</td>
<td>$94.70</td>
<td>$9,470.00</td>
<td>RR</td>
<td>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>014338027220</td>
<td>Rent crane truck mounted, hydraulic, 100 ton capacity, incl. Hourly Oper. Cost.</td>
<td>Week</td>
<td>$9,888.76</td>
<td>$9,888.76</td>
<td>RR</td>
<td>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
<td></td>
</tr>
</tbody>
</table>

**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 XX% 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
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
• **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.
• Establish the procurement method with your client PRIOR to quoting the job

• **CP contract number** – put on BOTH - Quote & P.O.

• CP needs to receive:
  (1) confirming copy of each PO issued
  (2) monthly reporting to CP (completes legal procurement process for your client & keeps them in legal compliance)
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Sr. Manager of Facilities Planning
Office: 713-696-8252
Cell: 281-773-3036
skendrick@hcde-texas.org
Members:
Complete your survey at this time.
(YOUR FEEDBACK MATTERS!)
Looking forward to working with you!

Contact your Choice Partners contract manager to get started.
Contact Information

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Tel 713-696-0786 or 1-877-696-2122
www.choicepartners.org

Follow us:
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