



The Right Resources.
Right Now.





MEET THE CP STAFF







MEMBER TRAINING AGENDA

10:00 to 10:15 a.m.

Welcome and Introduction

10:15 to 10:40 a.m.

Choice Partners Cooperative Legal Requirements Food/Cafeteria Contracts

10:40 to 11:15 a.m.

Navigating the Website

11:15 a.m. to 12:15 p.m.

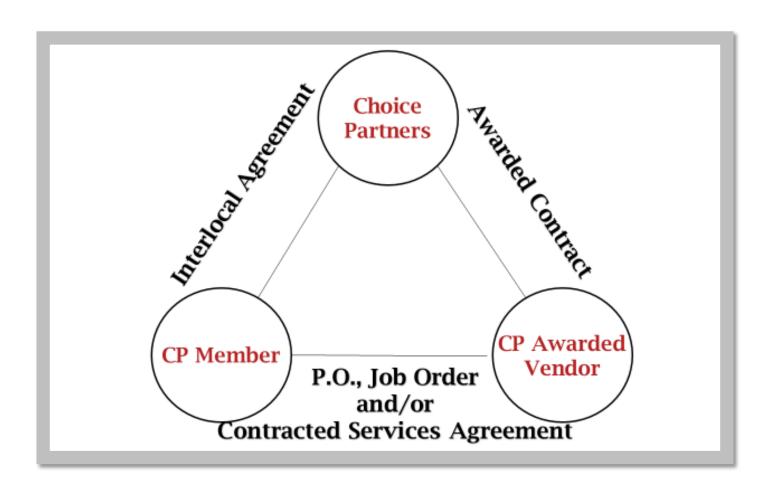
Job Order Contracting

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





WIN, WIN, WIN





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



THE 5 PILLARS WE SUPPORT







LEGAL REQUIREMENTS - TEXAS

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





DUE DILIGENCE



Contract Category: Construction-

JOC (JOC-IDIQ)

Contract Number: 21/039MR-05

Contract Terms:

Initial Award Date: July 21, 2021 Current Expiration Date: July 20, 2022 Renewal Options Remaining: 3

CP Contract Manager:

Michael Robles <u>mrobles@hcde-texas.org</u> 713-316-4254

Print Info.

Contract Partner: Facilities Sources



Contract Partner Web Site:

http://www.facilitiessources.com

Approved Market Area: TX

Texas Regional Centers: Region 4

Primary

Regions 3 and 5 Secondary

APPROVED PRODUCT OR SERVICE:

JOC-IDIQ Construction

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. All contracts are EDGAR compliant!

PRICING: Is according to the contract on file with CP. Send all PO copies to ecatalog@choicepartners.org

Freight Terms: -

HUB Status: Yes

MWBE Status: Yes

SBE Status: No

DUE DILIGENCE: Download







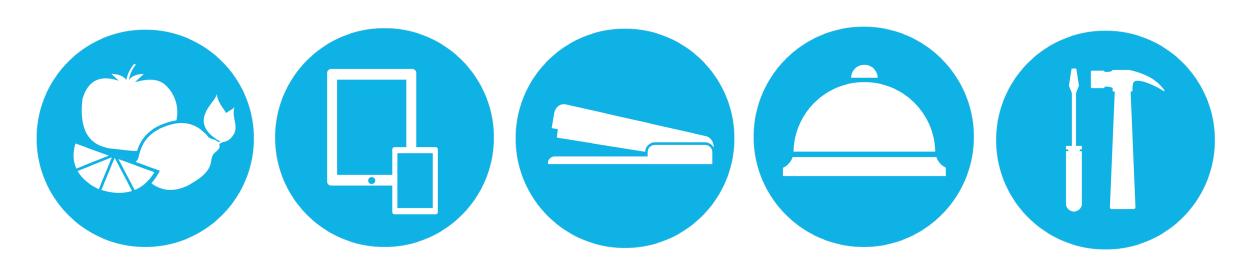
01 Ind	epend	ent Est	imate
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- 02 Legal Ad
- 03 RFP Document
- 04 Addenda (if applicable)
- 05 Evaluation Summary
- 06 Bid Tabulation
- 07 Bid Participation List
- 08 Supplier Response
- 09 EDGARS
- 10 Cost Price Analysis
- 11 Pricing/Catalog
- 12 1295 Form
- 13 SAMS (Debarment Form)
- 14 Board Approval Document
- 15 Award Letter
- 16 Contract
- 17 Contract Assignment (If Applicable)
- 18 Renewal 1 (If applicable) Approval
- 18 Renewal 2 (If applicable) Approval

DUE DILIGENCE ZIP FILE



CONTRACTS



FOOD/CAFETERIA TECHNOLOGY COMMODITIES SERVICES FACILITIES



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







FOOD/CAFETERIA CONTRACTS

- Procurement
 - TDA auditing Coop Contracts for upcoming PR/ARs
 - Website all documents posted
- ❖ 2022 New Year Member Meeting Welcome to 2022!!!
 - Friday, Feb. 4th
- 2022 Nutrition & Product EXPO
 - Thursday, October 14th
 - Humble Civic Center





FOOD MEMBER LOGIN

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.

PASSWORD LOGIN TO FOOD AREA ONLY

Helpful Links

LOGIN

<u>Set Up a New Account</u> <u>Available Contracts</u> <u>Forgot your password?</u>



FOOD MEMBER DASHBOARD

Pricing

View/download pricing sheets

by categories and contract

Child Nutrition Labels

View/download labels by

vendor

Food Members Dashboard

Welcome

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

You can:

- · Get quick pricing quotes for your equipment/small wares purchase
- View available Contracts and Vendors
- · Download current school year pricing
- Download required Annual Review documents
- Find commodity processing information **NEW -All Vendors SEPDS for SY 21-22**
- Download required Procurement Review documents

For more information, contact our Assistant Director, Trisha Prestigiacomo, at 713-696-0742. Our goal is to support you in finding the right resources for your child nutrition or cafeteria program.

Current Vendors

Search vendors by name, category, contract number or state

In-Active Contracts Due Diligence

Download required documents needed for auditing

Procurement/Annual Review

View/download procurement documents

Commodity Processing

View/download product information and nutrition facts

Resources

Find commonly used information needed by nutrition directors

Buy American Provision View/download American Provision

CONTACT INFO



Trisha Prestigiacomo, RTSBA: Choice Partners Assistant Director Food Contracts

Phone: 713-696-0742 trisha@ChoicePartners.org



Laura Sprehe - RD LD MPH: Contract Manager **Phone:** 713-696-8213 Laura@ChoicePartners.org



Navigating the Website





MEMBER LOGIN

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 TO FOOD AREA ONLY LOGIN **Helpful Links** Set Up a New Account **Available Contracts** Forgot your password?



MEMBER DASHBOARD

Contract List

Download pdf of current

contracts

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!

Get A Quote

Quickly select a category, vendors, and submit for quotes

Food

Current Vendors

Search vendors by name, category, contract number or state

Supply Catalog
View our online supply catalog
for cooperative contracts by
Category and for Vendor

RECENT ACTIVITY

2020 April Press Release April 20, 2020

<u>February 2020 Press Release</u> March 5, 2020

EVENTS

TASBO Annual Conference March 2, 2020

Texas Library Association
March 24, 2020

CMAT March 31, 2020



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







DUE DILIGENCE / PARTNERSHIP

Facilities Sources

Contract Category: Construction-JOC (JOC-IDIQ)

Contract Number: 21/039MR-05

Contract Terms:

Initial Award Date: July 21, 2021 Current Expiration Date: July 20, 2022 Renewal Options Remaining: 3

CP Contract Manager:

Michael Robles <u>mrobles@hcde-texas.org</u> 713-316-4254 Contract Partner: Facilities Sources

Print Info.



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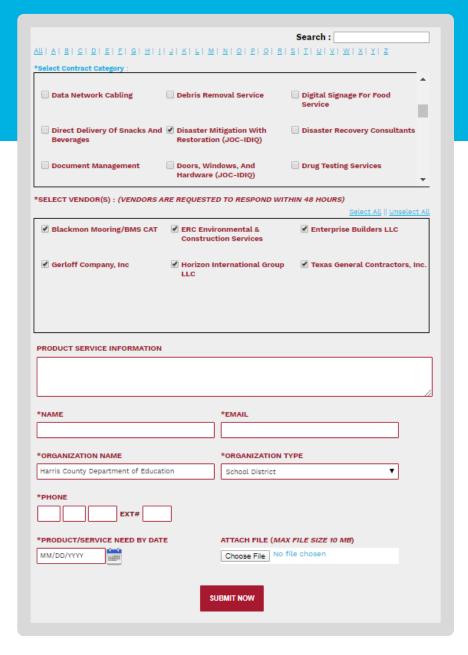
DUE DILIGENCE: Download





GET A QUOTE

- 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

About Choice Partners

All-in-One Cooperative

Procurement Process

Member Reviews

FAQs

Current News

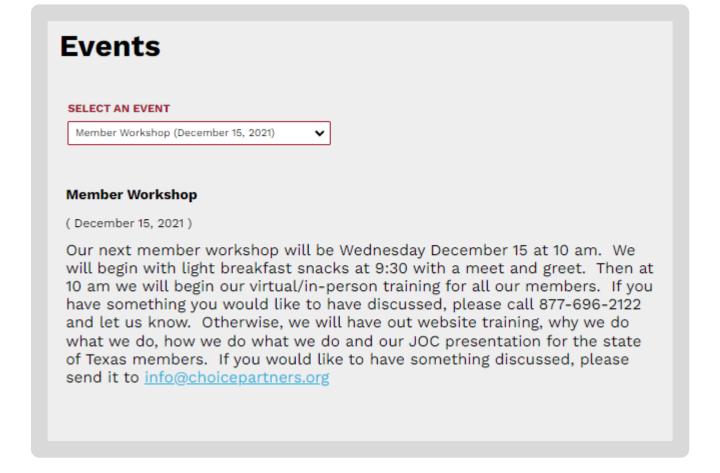
COVID-19

Vendor Spotlight

Events

Presentations

Contact Us





FAQ's

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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?

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.





VENDOR CONTACT INFORMATION



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 Print Info.

Contract Partner: Balfour Company

balfour.

Contract Partner Web Site: http://www.aaliackets.com

Approved Market Area: National

CONTACT INFO

For SALES

Matt Milks

8525 Westland West Blvd.

Houston, Texas 77041

Phone: 832-912-8000

Fax: 832-912-8005

mattm@balfourhouston.co

m

For SALES

Butch Milks

8525 Westland West Blvd.

Houston, Texas 77041

Phone: 832-912-8000

Fax: 832-912-8005

butchm@balfourhouston.c

<u>om</u>



STAFF CONTACT INFORMATION

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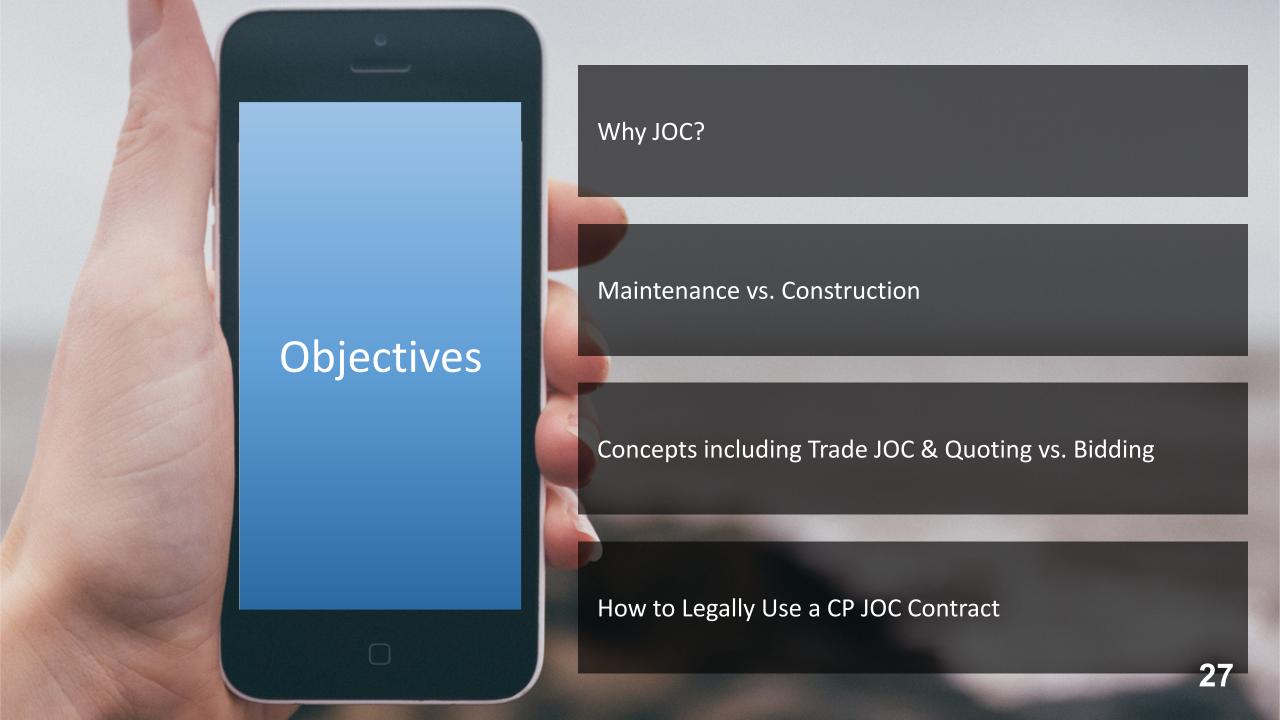
Contact Us

Joann Nichols, RTSBA	Assistant Director/Construction & Commodities	877 696 2122
Trisha Prestigiacomo, RTSBA	Assistant Director/Food	713-696 0742
Stephen Kendrick, RTSBA	Sr. Mgr. Facility Planning	713-696 8252
Kristi Nichols, RTSBA	Contract Manager	FMLA
Michael Robles, RTSBA	Contract Manager	713-316- 4254
Monique Joseph	Contract Manager	713 316 4259
Steve Gibson, CPSM	Contract Manager	713-681 6052
Laura Sprehe, RD, LD, MPH, RTSBA	Contract Manager/Food	713-696 8213
Melissa Wilder	Contract Coordinator/Food	713 696 8209
Emily Maldonado	Contract Assistant/Food	FMLA
Janet Wachs	CE Asst. Director	920 251 1097
Jan Arnold, CPA	Client Services Manager	713 696 0746

Mary Causey, MS, RTSBA	Contract Compliance Specialist	713-696 8270
Cora Day	Contract Coordinator	713 696 8208
Arlita Kyles, CTSBO	Contract Specialist	713-696 8241
Wonne Johnson, CTSBO	General Office Clerk II	713-696 1886
Kay Vorish, CTSBO	Contract Assistant	713-696 0743
Shandra Powell	Clerk - General Office	713-696 1389
Roland Salazar	Clerk - General Office	713 696 1787
Ann Marie Harbour	Field Representative	817-703 7901
Louise Hooper	Field Representative	713-305- 1447
Charlie "Les" Hooper	Field Representative	281 802 5693
Jeff Drury, RTSBA	Sr. Director	713 696 0786



Job Order Contracting (JOC)





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 triggerbonding 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



JOC/IDIQ – Why Job Order Contracting (JOC)

Time & Materials





If providing construction services

 Only method allowed to select contractors for future, undefined projects <u>Texas Education Code 44.031</u>
 (a)1-8



JOC/IDIQ – What is JOC/IDIQ Contracting

"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)

Maintenance Contract (TEC 44.031)

Repair & Maintenance

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



JOC/IDIQ Estimate

					HVAC	Exa	mple				
endor Na	ame										
ob Descr											
Choice Pa	rtners Contract #	18/036MC-XX									
Data Relea	se : Year 2019 Qua	arter 2									
Quantity	LineNumber	Description	Unit	O&P	rotai	Evt	Total O&P	Labor Type	Data Release	CCI Location	Notes
guarring	LilleNullibei	Description	Ullit	UAF		EX.	TOTAL OOF	Labor Type	Year 2019 Quarter	CCI Eocation	Insert any notes to
									2 (Use most		describe where work
									updated available		being done, what is
		Central station air handler, up thru 15 ton, selective							at time quote is		being provided in this
10	230505100400	demolition	Ea.	\$	579.25	\$	5.792.50	RR	requested)	TEXAS / HOUSTON (770-772)	line item, etc
	200000100100	Rooftop air conditioner, single zone, electric cool,			0.0.20	Ť	0,702.00		roquoctou)	12,710,110001017 (110112)	into itom, oto
		gas heat, 3 ton cooling, 60 MBH heating, includes,				l			Year 2019 Quarter		
1	237433101100	standard controls, curb and economizer	Ea.	\$	4.359.00	\$	4.359.00	RR	2	TEXAS / HOUSTON (770-772)	
	237433101100	Rooftop air conditioner, single zone, electric cool,	La.	Ψ	4,333.00	Ψ	4,000.00	IXIX		122467110001014 (770-772)	
		gas heat, 7.5 ton cooling, 170 MBH heating,							Year 2019 Quarter		
3	237433101150	includes, standard controls, curb and economizer	Fa	\$	8,213.65	\$	24.640.95	RR	2	TEXAS / HOUSTON (770-772)	
	207400101100	Rooftop air conditioner, single zone, electric cool,	Lu.	Ψ	0,210.00	Ψ	24,040.00	TUT		12/10/11/00/1014 (17/11/2)	
		gas heat, 8.5 ton cooling, 170 MBH heating,							Year 2019 Quarter		
1	237433101156	includes, standard controls, curb and economizer	Fa	\$	9,733.10	\$	9,733.10	RR	2	TEXAS / HOUSTON (770-772)	
	207400101100	Rooftop air conditioner, single zone, electric cool,	Lu.	Ψ	0,700.10	Ψ_	0,700.10	TUT		TEXTO / HOGOTON (FF0 FF2)	
		gas heat, 10 ton cooling, 200 MBH heating,							Year 2019 Quarter		
2	237433101160	includes, standard controls, curb and economizer	Ea.	\$	12,186.50	\$	24,373.00	RR	2	TEXAS / HOUSTON (770-772)	
		Rooftop air conditioner, single zone, electric cool,			,	Ť					
		gas heat, 12.5 ton cooling, 230 MBH heating,							Year 2019 Quarter		
1	237433101170	includes, standard controls, curb and economizer	Ea.	\$	13,614.90	\$	13,614.90	RR	2	TEXAS / HOUSTON (770-772)	
		Rooftop air conditioner, single zone, electric cool,								,	
		gas heat, 15 ton cooling, 270 MBH heating,							Year 2019 Quarter		
2	237433101180	includes, standard controls, curb and economizer	Ea.	\$	16,839.60	\$	33,679.20	RR	2	TEXAS / HOUSTON (770-772)	
		Curbs/pads prefabricated, pad, condenser,								,	
		fiberglass reinforced concrete with polystyrene							Year 2019 Quarter		
100	239110106050	foam core, 2" thick, 20" x 38"	Ea.	\$	94.70	\$	9,470.00	RR	2	TEXAS / HOUSTON (770-772)	
		Rent crane truck mounted, hydraulic, 100 ton							Year 2019 Quarter	, , ,	
1	015433602720	capacity, Incl. Hourly Oper. Cost.	Week	\$	9,898.76	\$	9,898.76	RR	2	TEXAS / HOUSTON (770-772)	
		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	***Optional if yo	u need to give additiona	al discount to be competitive.	
		2% Bond (Any additional Pass-Through Costs)				\$	2,440.11				
		Total Project Quote				\$	124,445.37				
		,				Ė	,				



Review the JOC Quote

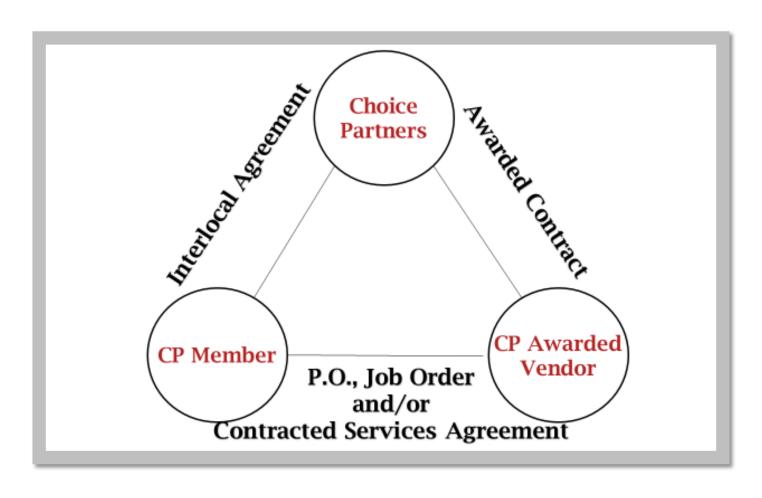
- CCI location
- Coefficient
- O & P Pricing
- Data release (most recent)

- Non pre-priced items
- Attempts to passthrough co-op fee
- Division 1
- Adjustment Factors





WIN, WIN, WIN





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."



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

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

TEX. OCC CODE § 1051.703

- Exceptions to Engineering Services:
 - An engineer is NOT required for a public work project if:
 - A project <u>involving electrical or mechanical engineering</u> will cost <u>\$8,000 or less</u>
 - A project <u>not involving electrical or mechanical engineering</u> will cost **\$20,000 or less** (i.e., structural or civil)



What Must Go to the Board?

- Determination of construction services project delivery method (if other than Competitive Sealed Bids or other method in local policy).
- 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

Case law has clarified that a "public work contract includes both traditional construction and contracts for repair of a building." LA Ash, Inc. v. Tex. A&M Univ., 2008 Tex. App. LEXIS 8206, 2008 WL 4742135 (Tex. App. Waco Oct. 29, 2008); see also Acratod Co. v. Housing Auth. Of Houston, 1999 Tex. App. LEXIS 889, 1999 WL 82450 (Tex. App. Houston 1st Dist. Feb. 11, 1999).



JOC / IDIQ – Bidding VS. Quoting

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

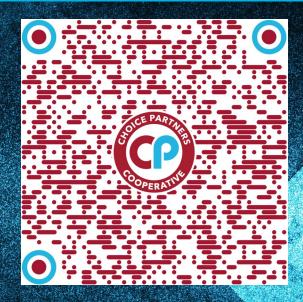
skendrick@hcde-texas.org



Survey

Members:

Complete your survey at this time. (YOUR FEEDBACK MATTERS!)





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



Contacts

CP Management

Jeff: jeff@choicepartners.org

Joann: joann@choicepartners.org

Trisha: <u>trisha@choicepartners.org</u>

Stephen: skendrick@hcde-texas.org

Contract Managers

Kristi: FMLA

Laura: laura@choicepartners.org

Michael: michael@choicepartners.org

Monique: monique@choicepartners.org

Steve: <u>steve@choicepartners.org</u>

Contract Compliance

Mary: mary@choicepartners.org

Billing

Arlita: arlita@choicepartners.org

Jan: jan@choicepartners.org

Kay: kay@choicepartners.org

Confirmation Only PO's

ecatalog@choicepartners.org

Marketing

Stephanie: sdelossantos@hcde-texas.org

Janet: janet@choicepartners.org



The Right Resources. Right Now.

www.choicepartners.org