



**The Right
Resources.
Right Now.**



WIFI

Wifi Device: Convention_Guest

NO PASSWORD



MEET THE CP STAFF





MEMBER TRAINING AGENDA

9:30 a.m. to 9:45 a.m.

Welcome and Introduction

9:45 a.m. to 10:15 a.m.

*Choice Partners Cooperative
Legal Requirements*

10:15 to 11:00 a.m.

Navigating the Website

11:00 a.m. to 11:30 a.m.

Vendor Intro and Break

11:30 a.m. to 12:15 p.m.

Job Order Contracting

12:15 p.m. to 12:45 p.m.

Lunch and Vendor Visits

12:45 p.m. to 1:00 p.m.

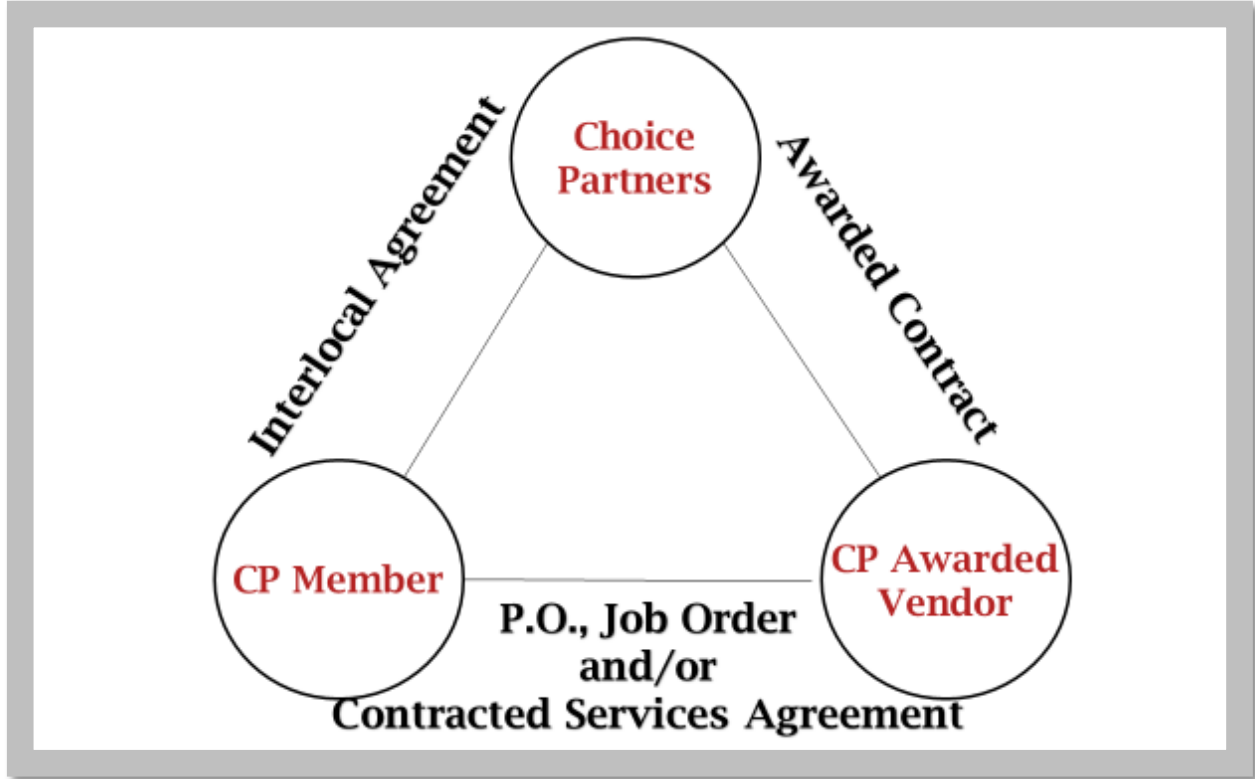
Door prizes awarded and evaluations

1:00 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

STUDENTS AND EDUCATORS SERVED

GRADUATE
DEDICATED
PURPOSEFUL
CATALYST
PERSISTENT

ADULT EDUCATION
9,121

IMPACT
ENGAGE
DISCOVER
ACHIEVE

CASE FOR KIDS
17,411

SUCCESS
EDUCATION
PREPARE
NUTRITION
HEALTH

HEAD START
3,409

STUDENT
ACADEMIC
ACHIEVER
SCHOLAR
OPPORTUNIST
LEARNER

SPECIAL SCHOOLS
729

TREATMENT
HELPFUL
BENEFIT
UNDERSTANDING
PATIENCE
INSPIRE
ANALYSIS

THERAPY SERVICES
13,898



 CENTER FOR SAFE AND SECURE SCHOOLS
51,655 Students and Educators

 CHOICE PARTNERS
\$28 Million in Support for Districts

 EDUCATOR CERTIFICATION
1,489 Educators Served

 RECORDS MANAGEMENT
42 Government Agencies

 TEACHING AND LEARNING CENTER
9,200 Educators Served



LEGAL REQUIREMENTS





Question 1

Has anyone had an “easy” RFP solicitation?



Question 1 - Answer

Reasons to use Choice Partners !

- Saves staff time in purchasing - Contracts are already competitively procured
- Saves staff time in construction, purchasing and food services
- Saves on budgets while saving taxpayer dollars
- Improves procurement initiatives and efficiency
- Extends staff time through use of these contracts

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

Print Info.

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
mrobles@hcde-texas.org
713-316-4254

Contract Partner: Facilities Sources



Contract Partner Web Site:
<http://www.facilitysources.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](#)





DUE DILIGENCE ZIP FILE

DUE DILIGENCE OUTLINE			Document Flow
01	XX-XXXXX	Independent Estimate (IED)	IED to generate Ad & Affidavit
02	XX-XXXXX	Advertisements & Affidavits	Ad and Affidavit rollout RFP
03	XX-XXXXX	RFP/CSP Document	RFP Posted on eBid
04	XX-XXXXX	RFP/CSP Addenda (if any)	RFP Addenda Posted on eBid
05	XX-XXXXX	Evaluation Summary	Committee Evaluates to Award
06	XX-XXXXX	Proposal (Bid) Tabulation	Document Generated from Evaluation
07	XX-XXXXX	Participation Listing	Back-up Doc of respondent history
08	XX-XXXXX	Vendor Response (Attributes)	Part of Proposal/CSP Response
09	XX-XXXXX	EDGAR Certification	Required Document for Proposal
10	XX-XXXXX	Cost Price Analysis (CPA)	Generated by Eval and Bid Tab
11	XX-XXXXX	Current Pricing	Listed with CPA
12	XX-XXXXX	TEC Form 1295 (ACK)	Required for Board Approval
13	XX-XXXXX	SAM Reports	Proof Entity/Officers not debarred by GSA
14	XX-XXXXX	Board Approval (Proof)	Award Approved
15	XX-XXXXX	Contract Award Letter	Board Approval Notice
16	XX-XXXXX	Contract	Exec of Offer and Ts and Cs
17	XX-XXXXX	Contract Assignment	Name or other changes (buyouts/mergers, etc.)
18	XX-XXXXX	Renewal Letter #1	R1 Signed Document
19	XX-XXXXX	Renewal Letter #2	R2 Signed Document
20	XX-XXXXX	Renewal Letter #3	R3 Signed Document



Question 2

Who do I contact at CP if I would like someone to review a quote that I received from an awarded CP vendor?



Question 2 - Answer

Mary Causey
Contract Compliance Specialist
Mary@choicepartners.org

Kristi Nichols
Contract Manager
Kristi@choicepartners.org

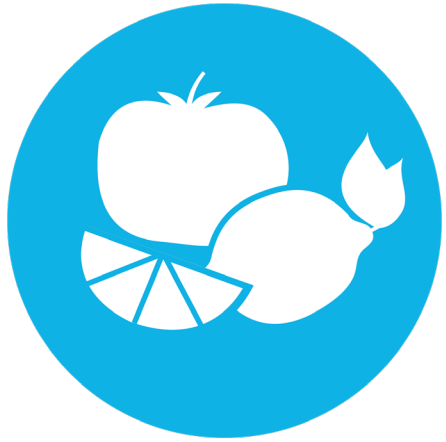
Michael Robles
Contract Manager
Michael@choicepartners.org

Monique Joseph-Francis
Contract Manager
Monique@choicepartners.org

Steve Gibson
Contract Manager
Steve@choicepartners.org



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 audited Coop Contracts for upcoming PR/ARs
 - Website – all documents posted

- ❖ 2022 Nutrition & Product EXPO
 - Thursday, October 13th @ Humble Civic Center

- ❖ New Contracts for SY 22-23
 - Commercial Food Distributor
 - Chemical Products for Foodservice
 - Direct Delivery of Snacks and Beverages
 - Restaurant Branded Food Delivery
 - Technology Products for Foodservice



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.

USERNAME

PASSWORD

LOGIN TO FOOD AREA ONLY

LOGIN

Helpful Links

[Set Up a New Account](#)

[Available Contracts](#)

[Forgot your password?](#)



FOOD MEMBER DASHBOARD

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 Prestigiaco, 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	Commodity Processing View/download product information and nutrition facts	Pricing View/download pricing sheets by categories and contract
In-Active Contracts Due Diligence Download required documents needed for auditing	Resources Find commonly used information needed by nutrition directors	Child Nutrition Labels View/download labels by vendor
Procurement/Annual Review View/download procurement documents	Buy American Provision View/download American Provision	

CONTACT INFO



Trisha Prestigiaco,
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

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

Current Vendors

Search vendors by name, category, contract number or state

Contract List

Download pdf or excel of current contracts

Food



Supply Catalog

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

RECENT ACTIVITY

[2022 February Press Release](#)

March 4, 2022

[2022 January Press Release](#)

January 26, 2022

EVENTS

[New vendor orientation](#)

March 23, 2022

[Member Workshop](#)

March 30, 2022

[TAPPA annual conference](#)

April 24, 2022



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

Construction Masters of Houston

[Print Info.](#)

Contract Category: Construction-
JOC (JOC-IDIQ)

Contract Number: 20/017MR-05

Contract Terms:

Initial Award Date: February 26, 2020

1st Renewal Start Date: February 26, 2021

2nd Renewal Start Date: February 26, 2022

Current Expiration Date: February 25, 2023

Renewal Options Remaining: 1

CP Contract Manager:

Michael Robles
mrobles@hcde-texas.org
713-316-4254

Contract Partner: Construction
Masters of Houston



Contract Partner Web Site:

<http://www.cmhou.com>

Approved Market Area: TX

Texas Regional Centers: Region 4
Primary

[Dashboard](#)

[Get A Quote](#)

[Current Vendors](#)

[Contract List](#)

[Food](#)

[Supply Catalog](#)

[Logout](#)

CONTACT INFO

For SALES
Justin Davis
3908 Third Street
Pearland, Texas 77581
Phone : 281-960-4491
Fax : 281-485-4702
justin@cmhou.com

APPROVED PRODUCT OR SERVICE:

APPROVED PRODUCT OR SERVICE:

IDIQ Construction and Maintenance (Job Order Contracting)

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: No

MWBE Status: No

SBE Status: No

DUE DILIGENCE: [Download](#)

ABOUT THIS PARTNER:

Construction Masters of Houston, Inc is a privately owned, mid-size general contracting firm based in Pearland, Texas. Robert Campbell started the company in 1987 with the belief that honesty, integrity and reliability would be the key elements to providing the Greater Houston Area with general contracting and construction management services.

Constructing buildings is a passion of ours and we do not take the responsibility of quality and customer satisfaction lightly. We have dedicated our careers to cultivating relationships, beyond the responsibilities of constructing a building, so that an organization's mission, culture and values are encompassed.

Our ability to produce a quality product, in time and on budget is a direct reflection of the relationships we build and respect earned with our subcontractors and vendors. We treat our partners with the same honesty, integrity and reliability as we do our clients; in-turn we require their commitment to our philosophy on the job.

The respect built leads to a cooperative partnership, between the design team, general contractor, subcontractors and vendors. This



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.

The screenshot shows a web form for requesting a quote. At the top right is a search bar. Below it is a list of contract categories with checkboxes. The selected vendor section shows several vendors with checkboxes, all of which are checked. The product service information section includes a large text area for description, and fields for name, email, organization name, organization type, phone, and product/service need by date. There is also an attach file section with a file upload button and a 'No file chosen' message. A red 'SUBMIT NOW' button is at the bottom right.

Search :

All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

*Select Contract Category :

<input type="checkbox"/> Data Network Cabling	<input type="checkbox"/> Debris Removal Service	<input type="checkbox"/> Digital Signage For Food Service
<input type="checkbox"/> Direct Delivery Of Snacks And Beverages	<input checked="" type="checkbox"/> Disaster Mitigation With Restoration (JOC-IDIQ)	<input type="checkbox"/> Disaster Recovery Consultants
<input type="checkbox"/> Document Management	<input type="checkbox"/> Doors, Windows, And Hardware (JOC-IDIQ)	<input type="checkbox"/> Drug Testing Services

*SELECT VENDOR(S) : (VENDORS ARE REQUESTED TO RESPOND WITHIN 48 HOURS)

[Select All](#) | [Unselect All](#)

<input checked="" type="checkbox"/> Blackmon Mooring/BMS CAT	<input checked="" type="checkbox"/> ERC Environmental & Construction Services	<input checked="" type="checkbox"/> Enterprise Builders LLC
<input checked="" type="checkbox"/> Gerloff Company, Inc	<input checked="" type="checkbox"/> Horizon International Group LLC	<input checked="" type="checkbox"/> Texas General Contractors, Inc. LLC

PRODUCT SERVICE INFORMATION

*NAME *EMAIL

*ORGANIZATION NAME *ORGANIZATION TYPE

*PHONE EXT#

*PRODUCT/SERVICE NEED BY DATE

ATTACH FILE (MAX FILE SIZE 10 MB) No file chosen



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All-in-One Cooperative

Procurement Process

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FAQs

Current News

COVID-19

Vendor Spotlight

Events

Presentations

Contact Us

Events

SELECT AN EVENT

Disaster Procurement Flight Plan (May 10, 2022)

Disaster Procurement Flight Plan

(May 10, 2022)

Join us as we take off with procurement's role in disaster response. Cruise through some ways to optimize federal disaster funding and land best practices for procurement disaster recovery.

Earn 3 CEUs for attending!

Tuesday, May 10, 2022

10 a.m. - 1 p.m.

Landry's Seafood House - 2nd Floor Banquet area

1 Boardwalk

Kemah, TX 77565



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?

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.



VENDOR CONTACT INFORMATION

Balfour Company

Print Info.

Contract Category: Award Jackets, Apparel, Screen Printing, and Embroidery

Contract Number: 20/046SG-04

Contract Terms:

Initial Award Date: August 19, 2020

1st Renewal Start Date: August 19, 2021

Current Expiration Date: August 18, 2022

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.aaljackets.com>

Approved Market Area: TX

CONTACT INFO

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



STAFF CONTACT INFORMATION

About Choice Partners

All-in-One Cooperative

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Contact Us

Joann Nichols, RTSBA	Assistant Director/Construction & Commodities	877-696-2122
Trisha Prestigiacomio, RTSBA	Assistant Director/Food	713-696-0742
Stephen Kendrick, RTSBA	Sr. Mgr. Facility Planning	713-696-8252
Kristi Nichols, RTSBA	Contract Manager	713-696-1337
Michael Robles, RTSBA	Contract Manager	713-316-4254
Monique Joseph-Francis, CTSBO	Contract Manager	713-316-4259
Steve Gibson, CPSM	Contract Manager	713-681-6052
Kelly Durney, CPCM	Contract Coordinator	713-696-8208
Laura Sprehe, RD, LD, MPH, RTSBA	Contract Manager/Food	713-696-8213
Melissa Wilder	Contract Coordinator/Food	713-696-8209
	Contract Assistant/Food	713-696-8243
Janet Wachs	MCE Asst. Director	920-251-1097
Jan Arnold, CPA	Client Services Manager	713-696-0746

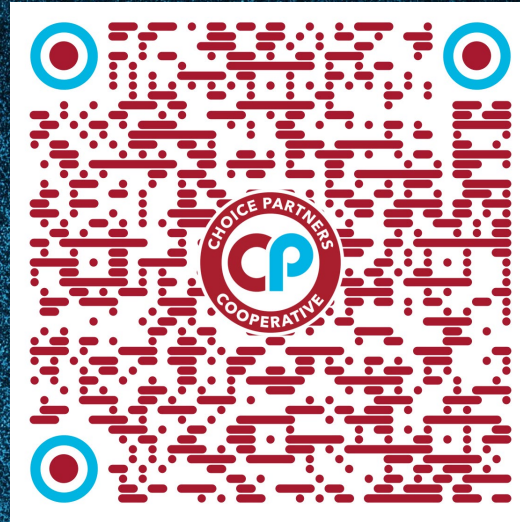
Mary Causey, MS, RTSBA	Contract Compliance Specialist	713-696-8270
Arlita Kyles, CTSBO	Contract Specialist	713-696-8241
Yvonne Johnson, CTSBO	General Office Clerk II	713-696-1886
Kay Vorish, CTSBO	Contract Assistant	713-696-0743
Shandra Powell	Clerk - General Office	713-696-1389
Roland Salazar	Clerk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



Survey

Members:

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



SURVEY



Job Order Contracting (JOC)



Objectives

Why JOC?

Maintenance vs. Construction

Concepts including Trade JOC & Quoting vs. Bidding

How to Legally Use a CP JOC Contract

Common Phrases

1

That's the way we have always done it.

2

It was like that when I got here

3

It's not right, but it's normal for us

4

Another department is responsible for that.

Standard
Opera
Procedu



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

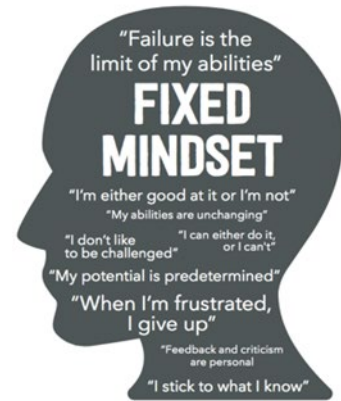


JOC/IDIQ – Why Job Order Contracting (JOC)

• ~~Time & Materials~~

If providing construction services

- **Only** method allowed to select contractors for future, undefined projects **Texas Education Code 44.031**
(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



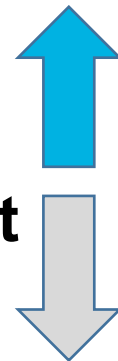
JOC/IDIQ – Maintenance VS. Construction

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)



Maintenance VS. Construction

Good rule of thumb:

- Procure maintenance service contracts under Tex. Gov't Code Chapter 2269, rather than under non-2269 method (like TEC 44 for ISD's), if
 - Maintenance and routine repair contracts could include significant replacements, repairs or installation of new structures, appurtenances, features, components or fixtures;
 - Repairs will be performed by laborers, workers or mechanics who would be required to furnish performance or payment bonds or would be entitled to a minimum prevailing wage rate under public laws; or
 - There is a potential for a repair to require the services of an architect or engineer, the securing of permits, or compliance with updated building or electrical codes.



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 Example									
Vendor Name									
Job Description									
Choice Partners Contract #18/036MC-XX									
Data Release : Year 2019 Quarter 2									
Quantity	LineNumber	Description	Unit	O&P	Ext. Total O&P	Labor Type	Data Release	CCI Location	Notes
10	230505100400	Central station air handler, up thru 15 ton, selective demolition	Ea.	\$ 579.25	\$ 5,792.50	RR	Year 2019 Quarter 2 (Use most updated available at time quote is requested)	TEXAS / HOUSTON (770-772)	Insert any notes to describe where work is being done, what is being provided in this line item, etc
1	237433101100	Rooftop air conditioner, single zone, electric cool, gas heat, 3 ton cooling, 60 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 4,359.00	\$ 4,359.00	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
3	237433101150	Rooftop air conditioner, single zone, electric cool, gas heat, 7.5 ton cooling, 170 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 8,213.65	\$ 24,640.95	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
1	237433101156	Rooftop air conditioner, single zone, electric cool, gas heat, 8.5 ton cooling, 170 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 9,733.10	\$ 9,733.10	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
2	237433101160	Rooftop air conditioner, single zone, electric cool, gas heat, 10 ton cooling, 200 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 12,186.50	\$ 24,373.00	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
1	237433101170	Rooftop air conditioner, single zone, electric cool, gas heat, 12.5 ton cooling, 230 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 13,614.90	\$ 13,614.90	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
2	237433101180	Rooftop air conditioner, single zone, electric cool, gas heat, 15 ton cooling, 270 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 16,839.60	\$ 33,679.20	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
100	239110106050	Curbs/pads prefabricated, pad, condenser, fiberglass reinforced concrete with polystyrene foam core, 2" thick, 20" x 38"	Ea.	\$ 94.70	\$ 9,470.00	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
1	015433602720	Rent crane truck mounted, hydraulic, 100 ton capacity, Incl. Hourly Oper. Cost.	Week	\$ 9,898.76	\$ 9,898.76	RR	Year 2019 Quarter 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 you need to give additional discount to be competitive.		
		2% Bond (Any additional Pass-Through Costs)			\$ 2,440.11				
		Total Project Quote			\$ 124,445.37				

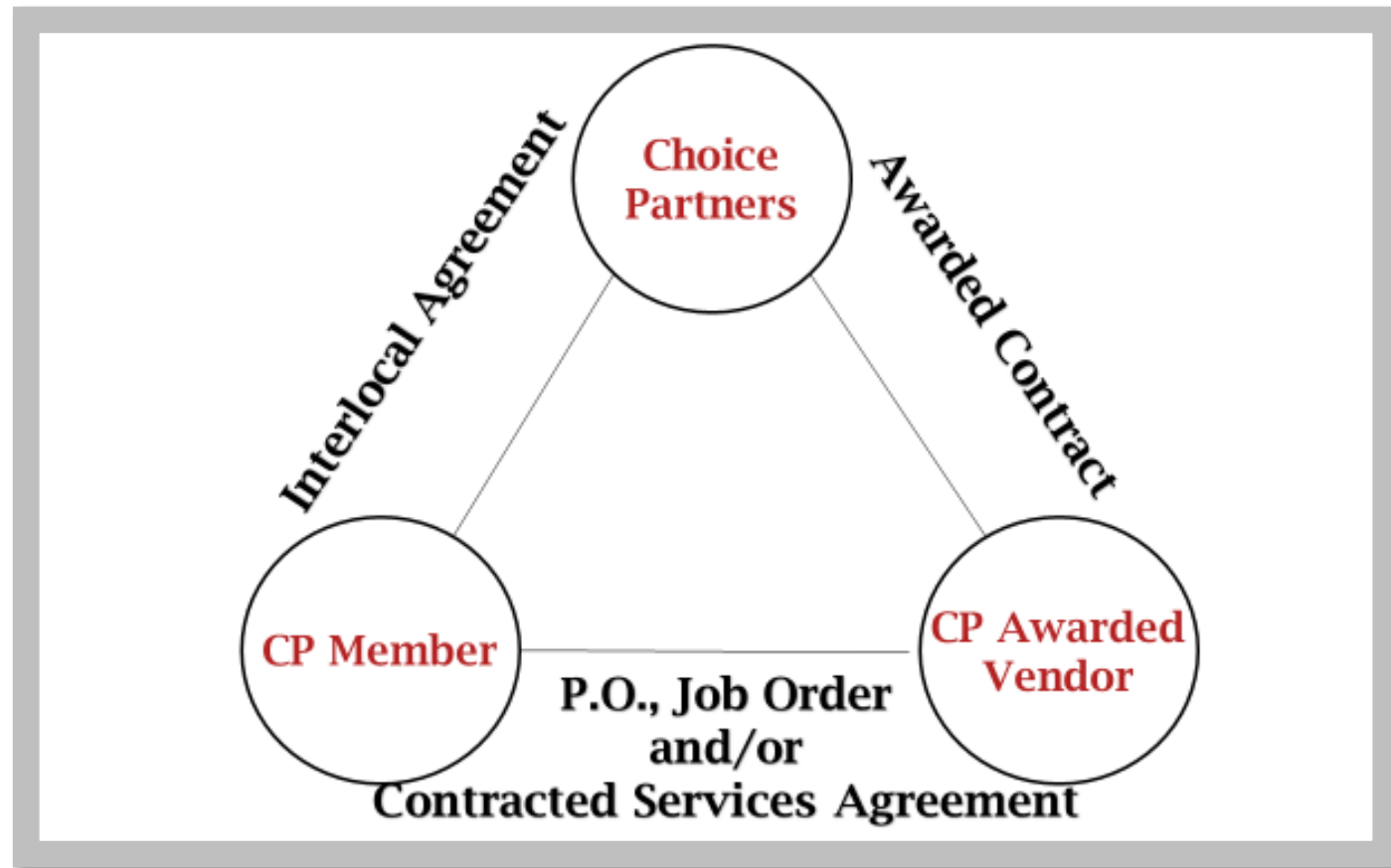


Review the JOC Quote

- 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





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 involving electrical or mechanical engineering will cost **\$8,000 or less**
 - A project not involving electrical or mechanical engineering will cost **\$20,000 or less** (i.e., structural or civil)

TEX. OCC CODE § 1001.053



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**

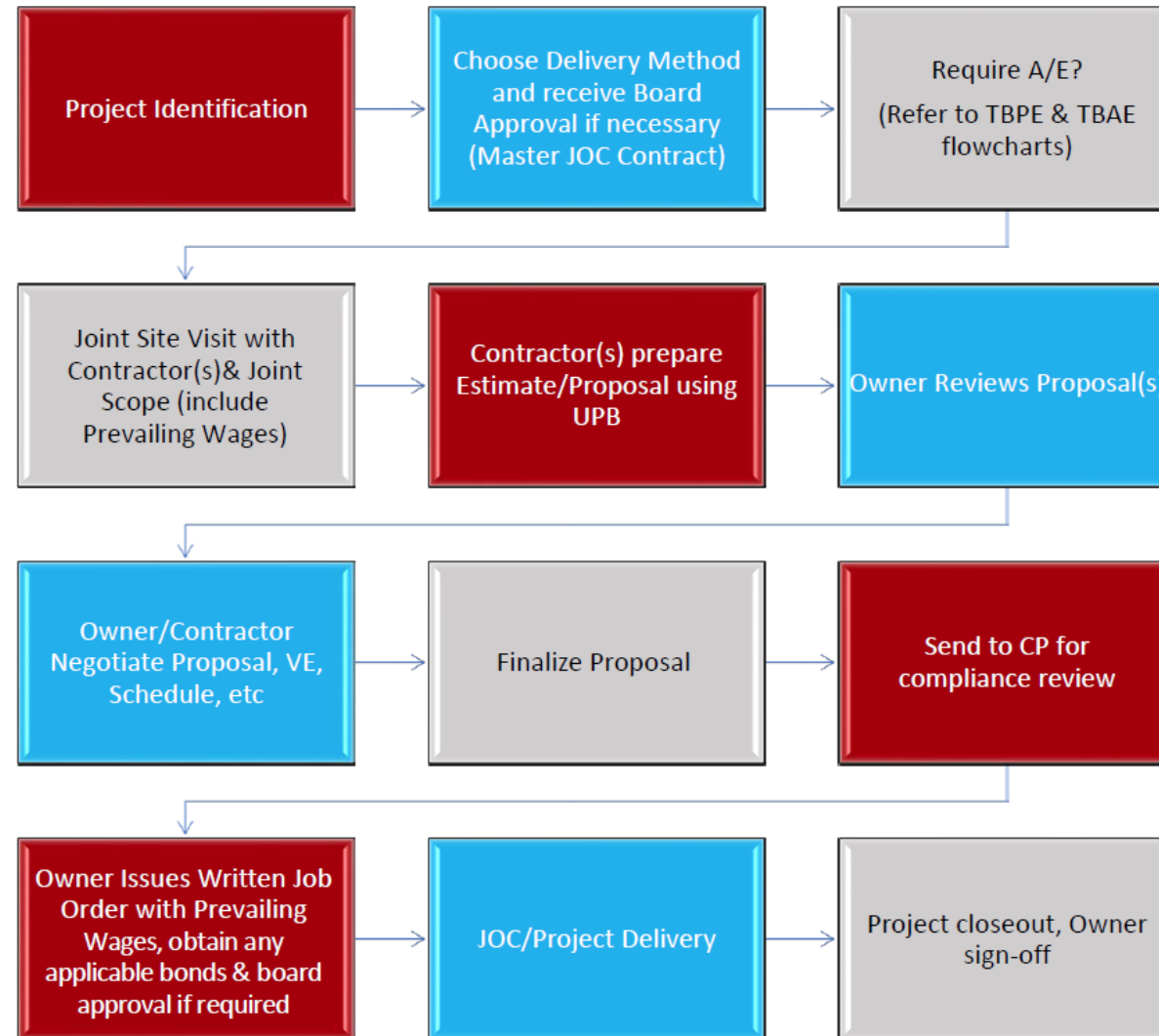
vendor's ***formal, written, sealed response*** that satisfies the state's procurement requirements for a governmental entity.

- **QUOTE**

vendor's ***job-specific price in writing*** based on their previously bid and awarded contract coefficient and contract specified UPB.



The JOC Process - Texas





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



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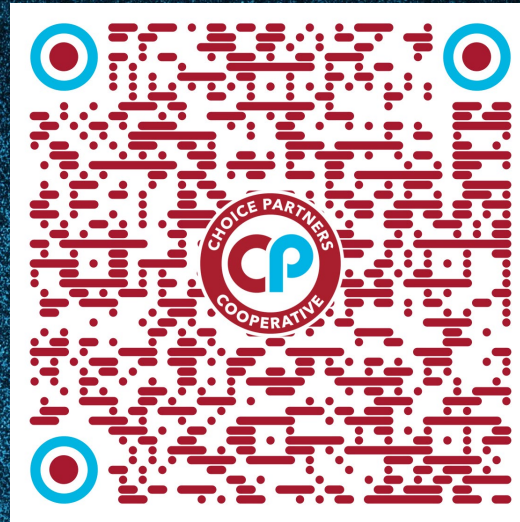
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Survey

Members:

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



SURVEY



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