The Right Resources. Right Now.
MEET THE CP STAFF
## MEMBER WORKSHOP AGENDA

**November 30, 2022**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
</table>
| 10:00 to 10:15 a.m. | Welcome and Introduction  
HCDE & Choice Partners Cooperative  
New Developments, Choice Ca$h |
| 10:15 to 10:45 a.m. | Legal and Contracts  
Food/Cafeteria Contracts |
| 10:45 to 11:15 a.m. | Navigating the Website |
| 11:15 a.m. to 12:00 p.m. | Job Order Contracting |
| 12:00 -12:30 p.m. | Lunch and Closing |
WIN, WIN, WIN

[Diagram showing relationships between Choice Partners, CP Member, CP Awarded Vendor, Interlocal Agreement, Awarded Contract, P.O., Job Order and/or Contracted Services Agreement]
HCDE, A GOVERNMENTAL ENTITY

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

ADULT EDUCATION 9,121
CASE FOR KIDS 17,441
HEAD START 3,409
SPECIAL SCHOOLS 729
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 Foundation for Cooperative Contracts

| TEXAS | Sec. 791.011. CONTRACTING AUTHORITY; TERMS. (a) A local government may contract or agree with another local government...to perform governmental functions and services in accordance with this chapter.  
(c) An interlocal contract may be to:  
(2) provide a governmental function or service that each party to the contract is authorized to perform individually  
(j) ... the term "purchasing cooperative" means a group purchasing organization that governmental entities join as members and the managing entity of which receives fees from members or vendors.  
https://statutes.capitol.texas.gov/Docs/GV/htm/GV.791.htm |
| FEDERAL | § 200.318 General procurement standards.  
(e) To foster greater economy and efficiency, and in accordance with efforts to promote cost-effective use of shared services across the Federal Government, the non-Federal entity is encouraged to enter into state and local intergovernmental agreements or inter-entity agreements where appropriate for procurement or use of common or shared goods and services. Competition requirements will be met with documented procurement actions using strategic sourcing, shared services, and other similar procurement arrangements.  
## Procurement Methods used by Choice Partners

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Proposals (RFP)</td>
<td>For Goods and (non-construction) Services</td>
</tr>
<tr>
<td>Competitive Sealed Proposals (CSP)</td>
<td>For Construction Services (Excluding architectural and engineering)</td>
</tr>
<tr>
<td></td>
<td>Job Order Contracts (JOC)</td>
</tr>
<tr>
<td></td>
<td>Maintenance Contracts</td>
</tr>
</tbody>
</table>
Key Procurement steps

- Independent Estimate (prior to advertising)
- Advertisement (Local and National)
- Evaluation Criteria Defined in RFP
- Public Opening of Sealed proposals
- Competitive Evaluation
- Cost Price Analysis performed
- Recommendation of Award
- Board Approval at Public Meeting
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 |
United Rentals

Contract Category: Industrial Equipment Rent, Lease or Purchase
Contract Number: 22/052SG-03
Contract Terms:
Initial Award Date: September 21, 2022
Current Expiration Date: September 20, 2023
Renewal Options Remaining: 4
CP Contract Manager:
Steve Gibson
steve@choicepartners.org
713-681-6052
Contract Partner Web Site: http://www.unitedrentals.com
Approved Market Area: National

Approved Product or Service:
Industrial Equipment

To Place an Order:
Contact the vendor for all your pricing needs, stating you are using CP contract. Request a quote from the vendor referencing Choice Partners and the above contract number. Send PO directly to Vendor, then Log in to Choice Partners and report the Purchase Order details at Add Purchase Order | Choice Partners Cooperative

Pricing: Is according to the contract on file with CP.

Freight Terms: -
HUB Status: No
MWBE Status: No
SBE Status: No

Due Diligence: Download

About This Partner:
United Rentals offers general, aerial, and specialty rentals to a customer base that includes construction and industrial companies; utilities; municipalities;
**WHAT IS IN THE DUE DILIGENCE ZIP FILE?**

<table>
<thead>
<tr>
<th>Independent Estimate Determination (IED)</th>
<th>TEC Form 1295</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newspaper advertisement(s)</td>
<td>SAM.gov report(s) (Debarment by GSA)</td>
</tr>
<tr>
<td>RFP Document</td>
<td>Board Approval Document</td>
</tr>
<tr>
<td>RFP Addenda (if applicable)</td>
<td>Contract Award Letter</td>
</tr>
<tr>
<td>Proposal Evaluation Summary</td>
<td>Contract</td>
</tr>
<tr>
<td>Participation Listing</td>
<td>Contract Assignment (if applicable)</td>
</tr>
<tr>
<td>Cost Price Analysis (CPA)</td>
<td>Current and Past Renewal Letters</td>
</tr>
</tbody>
</table>
What is the legal basis for using a cooperative?

Government Code § 791.011 (TX) and 2 CFR §200.318 (Federal)
What are the two procurement methods used by Choice Partners?

Request for Proposals (RFP) and Competitive Sealed proposals (CSP)
Questions on Compliance or Review of a Quotation

Mary Causey, RTSBA  
Contract Compliance Specialist  
(713) 696-8270  
Mary@choicepartners.org

Michael Robles, RTSBA  
Contract Manager  
(713) 316-4254  
Michael@choicepartners.org

Kristi Nichols, RTSBA  
Contract Manager  
(713) 696-1337  
Kristi@choicepartners.org

Monique Joseph-Francis, CTSBO  
Contract Manager  
(713) 316-4259  
Monique@choicepartners.org

Laura Sprehe, RD, LD MPH, RTSBA, SNS  
Contract Manager (Food Contracts)  
(713) 696-1337  
Laura@choicepartners.org

Steve Gibson, CPSM  
Contract Manager  
(713) 681-6052  
Steve@choicepartners.org
CONTRACTS

FOOD/CAFETERIA | TECHNOLOGY | COMMODITIES | SERVICES | FACILITIES
• 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
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 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.

CONTACT INFO

Trisha Prestigiaco,
RTESB:
Choice Partners Assistant Director
Food Contracts
Phone: 713-696-0742
trisha@ChoicePartners.org

Laura Sprehe - RD LD MPH
Contract Manager
Phone: 713-696-8210
Laura@ChoicePartners.org
Navigating the Website
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

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 projects, usually within 48 hours
- View available Contracts and Vendors with their compete documentation to help make purchase legal
- 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 877-686-2122 for immediate assistance. Our goal is to support you in finding the right resources, right now!

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### Recent Activity

- **2022 October Press Release**
  - October 21, 2022

- **2022 September Press Release**
  - September 28, 2022

### Events

- **TxPPA Annual Conference**
  - November 15, 2022

- **Vendor Orientation and Rebate Rollout**
  - November 29, 2022

- **Member Workshop**
  - November 30, 2022
**Atlas Universal**

**Contract Category:** Waterproofing/Masonry  
**Contract Number:** 22/022MJ-02  
**Contract Terms:**  
- Initial Award Date: April 20, 2022  
- Current Expiration Date: April 19, 2023  
- Renewal Options Remaining: 3  
**CP Contract Manager:** Monique Francis  
- Email: mfrancis@choicepartners.org  
- Phone: 713-316-4269

**Contract Partner:** Atlas Universal  
**Contract Partner Web Site:** [http://www.atlasuniversal.com](http://www.atlasuniversal.com)  
**Approved Market Area:** TX  
**Texas Regional Centers:** Region 4 Primary

**APPROVED PRODUCT OR SERVICE:** Waterproofing, Roofing, & Masonry  
**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:** Rooted in Texas for over 130 years! We work with a diversity of clientele ranging from commercial real estate, industrial, retail, government, school districts to medical facilities. We are experts in all roofing systems and are approved by top manufacturers such as Tremco, Garland, Johns Mansville, Firestone, Soprema, GAF, Tamko – just to name a few. At Atlas Universal Roofing we pride ourselves on workmanship and personalized attention to every roofing detail throughout the duration of each project.

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**CONTACT INFO**

For SALES  
**Miranda Zenteno**  
735 W. Tidwell Rd.  
Houston, Texas 77091  
**Phone:** 713-695-1626  
**Fax:** 713-695-1654  
**Email:** [Miranda@atlasuniversal.com](mailto:Miranda@atlasuniversal.com)
Add Purchase Order

Please add your purchase order to our system to qualify for your Choice Ca$h Rebate. Use the button named "Bulk Upload" if you have multiple PO's or multiple vendors; otherwise you can enter them one at a time using the button named "Manual Upload".

**NOTE:** Download Template Here

Name of Person Submitting: Andrey Cuellar
Email: andrey.cuellar@hcte-texas.org
Member Name: Harris County Department of Education
CP Member City: Houston
Date: October 20, 2022

If you have a new PO, use one of the 2 buttons below; to manage previously submitted P.O.s, click here.

- **Bulk Upload? (CSV or XLSX)**
- **OR**
- **Add Manually?**
# Add Purchase Order

Please add your purchase order to our system to qualify for your **Choice Ca$h** Rebate. Use the button named “Bulk Upload” if you have multiple PO's or multiple vendors; otherwise you can enter them one at a time using the button named “Manual Upload”.

**NOTE:** [Download Template Here](#)

<table>
<thead>
<tr>
<th>Name of Person Submitting: Andrey Cuellar</th>
<th>Email: <a href="mailto:andrey.cuellar@hcdie-texas.org">andrey.cuellar@hcdie-texas.org</a></th>
<th>Date: October 20, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Name: Harris County Department of Education</td>
<td>CP Member City: Houston</td>
<td>Contract: select</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bill Date</th>
<th>PO Number</th>
<th>PO File</th>
<th>PO Order Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM/DD/YYYY</td>
<td>[File]</td>
<td>Choose File</td>
<td>no file chosen</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>[File]</td>
<td>Choose File</td>
<td>no file chosen</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>[File]</td>
<td>Choose File</td>
<td>no file chosen</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>[File]</td>
<td>Choose File</td>
<td>no file chosen</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>[File]</td>
<td>Choose File</td>
<td>no file chosen</td>
</tr>
</tbody>
</table>

**Send PO To Vendor on my behalf?**

- [ ] Yes  - [ ] No

**NOTE:** Your PO will **not** automatically go to the vendor unless you check **YES**.
Rebate Program

Choice Partners now offers a new avenue for members to earn money back from what they spend on Choice contracts. Beginning Sept. 1, 2022, CP’s Rebate Program will be available to all members across all awarded CP contracts. The opportunity to benefit from using CP contracts is a great way to counter budget reductions and rising costs of doing business. Having a full complement of contracts to meet most needs of governmental entities, Choice Partners is excited to provide this opportunity to reward its members for their loyal partnership. For more information about the rebate program, contact 1-877-696-2122 or info@choicepartners.org.

- Make money for your entity by using the BEST contracts in the industry.
- CP contracts are: EDGAR, 2 CFR 200, TDA/USDA (for food contracts) compliant.
- Reporting your usage of our contracts helps us record your activity and keep you compliant in case of an audit.
- Spend money to make money.
- Payments begin on HCDE FY 22-23 school year (Sept. 1) and paid out December 2023.

Report Your CP Contract Activity

Have any technical issues? Let us know.

Submit Technical Issues

If you would like step-by-step instructions on how to submit a purchase order, view below:

How to Submit a Purchase Order

If you would like to view a how-to video, we have provided it here:

Instructions on How To Get Started
For all amazon inquiries, email choicepartners-publicsector@amazon.com.
• 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

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.

Q: 3. What does it cost to use Choice Partners?
A: There is no charge to client members to join Choice Partners and no charge to use Choice Partners national cooperative contracts; vendor partners pay a small percentage fee back to Choice Partners. This fee is clearly stated in the vendor’s contract prior to being executed and this fee is included in all pricing from the vendors to Choice Partners.
Fee schedule for our vendors.
<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joann Nichols, RTSBA</td>
<td>Assistant Director/Construction &amp; Commodity</td>
<td>877-696-2122</td>
</tr>
<tr>
<td>Trisha Prestipiacomo, 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>Kristi 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>Monique Joseph-Francis, CTSBO</td>
<td>Contract Manager</td>
<td>713-316-4259</td>
</tr>
<tr>
<td>Steve Gibson, CPSM</td>
<td>Contract Manager</td>
<td>713-681-6052</td>
</tr>
<tr>
<td>vacant</td>
<td></td>
<td>713-696-8208</td>
</tr>
<tr>
<td>Laura Sogeh, RD, LD, MPH, RTSBA</td>
<td>Contract Manager/Food</td>
<td>713-696-8213</td>
</tr>
<tr>
<td>Monica Niles</td>
<td>Contract Coordinator</td>
<td>713-696-8209</td>
</tr>
<tr>
<td>Janet Wachs</td>
<td>MCE Aust. Director</td>
<td>920-251-1097</td>
</tr>
<tr>
<td>Jane Lopez</td>
<td>Client Services Manager</td>
<td>713-696-0749</td>
</tr>
<tr>
<td>Mary Causey, MS, RTSBA</td>
<td>Contract Compliance Specialist</td>
<td>713-696-8270</td>
</tr>
<tr>
<td>Arlita Kyles, CTSBO</td>
<td>Contract Specialist</td>
<td>713-696-8211</td>
</tr>
<tr>
<td>Yvonne Johnson, CTSBO</td>
<td>General Office Clerk II</td>
<td>713-696-1886</td>
</tr>
<tr>
<td>Key Vorish, CTSBO</td>
<td>Contract Assistant</td>
<td>FMLA</td>
</tr>
<tr>
<td>Shandra Powell</td>
<td>Clerk - General Office</td>
<td>713-696-1388</td>
</tr>
<tr>
<td>Roland Salazar</td>
<td>Clerk - General Office</td>
<td>713-696-1787</td>
</tr>
<tr>
<td>Ann Marie Harbour</td>
<td>Field Representative</td>
<td>817-703-7901</td>
</tr>
<tr>
<td>Louise Hogue</td>
<td>Field Representative</td>
<td>713-305-1447</td>
</tr>
<tr>
<td>Charles &quot;Leo&quot; Hooper</td>
<td>Field Representative</td>
<td>281-802-5693</td>
</tr>
<tr>
<td>Jeff Perry, RTSBA</td>
<td>Sr. Director</td>
<td>713-696-0786</td>
</tr>
</tbody>
</table>
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.
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*
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)*
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
### Vendor Name

**Job Description**
Choice Partners Contract #18/036MC-XX

**Data Release** - Year 2019 Quarter 2

---

#### HVAC Example

<table>
<thead>
<tr>
<th>Quantity</th>
<th>LineNumber</th>
<th>Description</th>
<th>Unit</th>
<th>O&amp;P</th>
<th>Est. 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>1</td>
<td>239505106050</td>
<td>Curbs/pads prefabricated, pad, condenser, fiberglass reinforced concrete with polystyrene foam core, 2&quot; thick, 20&quot; x 38&quot;</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>Insert any notes to describe where work is being done, what is being provided in this line item, etc.</td>
</tr>
<tr>
<td>2</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>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
<td></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>$12,186.50</td>
<td>$24,373.00</td>
<td>RR</td>
<td>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
<td></td>
</tr>
<tr>
<td>2</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>
<td></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>$9,886.76</td>
<td>$9,886.76</td>
<td>RR</td>
<td>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>239510106050</td>
<td>Heat crane truck mounted, hydraulic, 100 ton capacity, incl. Hourly Oper. Cost</td>
<td>Week</td>
<td>$9,886.76</td>
<td>$9,886.76</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 Project Quote | $124,445.37 |

**Insert what you bid**

**Total with Coefficient (1.0 x RS Means Total)**

| Total Project Quote | $124,445.37 |

**Additional Discount of XX% good for current project only**

| Total Project Quote | $122,005.27 |

**2% Bond (Any additional Pass-Through Costs)**

| Total Project Quote | $2,440.11 |

---

*Optional if you need to give additional discount to be competitive.*
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.”

TEX. GOV’T CODE § 2269.410
• 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 \textit{involving electrical or mechanical engineering} will cost $8,000 or less
    - A project \textit{not involving electrical or mechanical engineering} will cost $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 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

• **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 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
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
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Contacts

**CP Management**

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**Contract Managers**

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**Contract Compliance**

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**Billing**

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<tr>
<td>Kay</td>
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**Confirmation Only PO’s**

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**Marketing**

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**Field Representatives**

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The Right Resources. Right Now.

www.choicepartners.org