



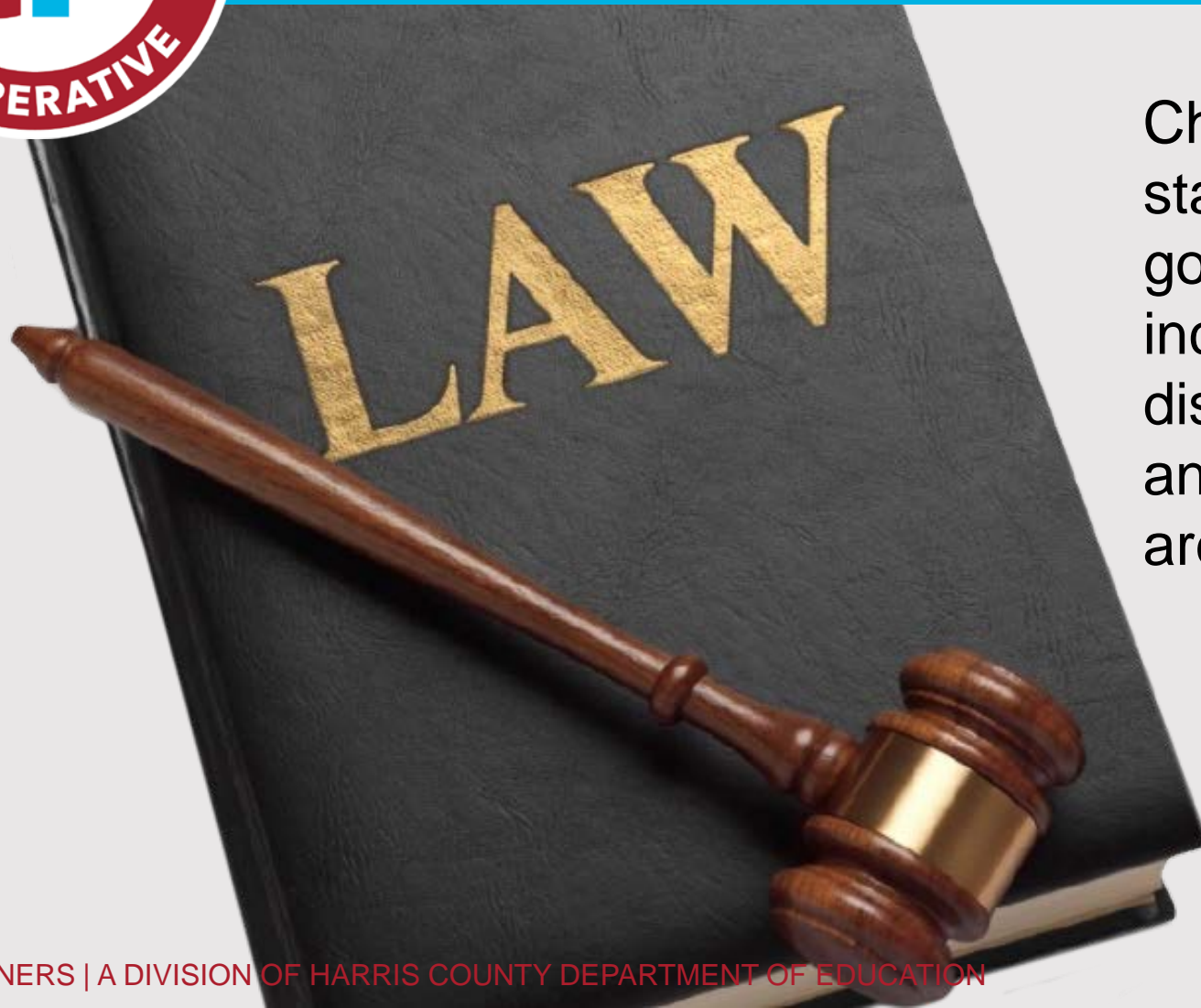
Efficiency in Procurement

When you need to make a Choice,
make the Right Choice...



Legal Requirements

Choice Partners follows all state and federal laws governing public procurement, including EDGAR for school districts. HUB, MWBE, SBA and other vendor certifications are requested on each RFP.





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 Government Code
252/262 Purchasing &
Contracting Authority of
Municipalities, Counties,
other Governmental entities

24 CFR 85.36
Housing and
Urban
Development



EDGAR/Uniform
Guidance
2 CFR 200

TEC 51.9335
Higher Education





Choice Partners Contracts

Educational



Facility Services



**Food/Cafeteria
Supplies**



**Supplies
and Services**



Technology



The Right Resources. Right now.

Choice Partners Cooperative Serving

Schools | Colleges | Universities | Counties | Municipalities | NonProfits

HCDE-CP JOC/IDIQ Contracting: What you need to know to stay Legal & Compliant

BY: Stephen Kendrick, Sr. Manager of Facilities Planning



A hand holding a black smartphone. The screen is covered by a vertical gradient bar transitioning from red at the top to green at the bottom. The word "Objectives" is written in white text across the center of this gradient.

Objectives

Concepts & Terminology of Job Order Contracting (JOC)

Maintenance vs. Construction

Trade JOC vs. JOC

Quoting vs. Bidding

Why Job Order Contracting (JOC)

- ~~“Time & Materials”~~

- If providing “construction services”

- Only method allowed to select contractors for future, undefined projects
- [TEC 44.031](#), TEC 51, LGC 252.043, LGC 262.023, LGC 271.054

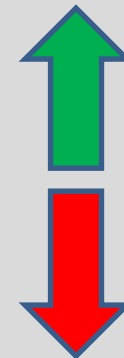
JOC/IDIQ

- **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)

What is Job Order 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



Using JOCs 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 District**
- 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



What Cannot Be Done Under a JOC Contract?

- Engineering and Architectural Services
- Ground up construction of a new building
- A related type of project associated with civil engineering construction
- A building or structure that is incidental to a project that is primarily a civil engineering construction project

Texas Government Code 2269.402, 2269.408

What is the Unit Price Book?

- The contract specified UPB is a published maintenance or construction unit price book (RS Means or National Construction Estimator by Craftsman).
- Contains a list of tasks with an assigned cost for each task representing labor, material, and equipment cost.



What is a JOC/IDIQ Estimate?

- A line item assessment utilizing the Unit Price Book (UPB)
- Contains the tasks necessary to complete scope of work
- “Localized” by applying a City Cost Index (CCI) assigned to various cities
- Reduced by legally bid coefficient
- Contains contract number
- Subcontractor pricing must be estimated using the UPB for ALL scope of work

What is the Unit Cost?

- Includes all costs related to labor, materials, and equipment
- “Localized” by applying a City Cost Index (CCI) assigned to various cities

What is a Coefficient?

- Establishes a competitively bid cost adjustment or multiplier to the UPB pricing
- Includes contractor's overhead and profit.
- Represented as a baseline of 1.0.

JOC/IDIQ Estimate

Roofing JOC/IDIQ RS Means UPB Training Sample

Vendor Name

Job Description

Choice Partners Contract #17/038CG-XX

Data Release : Year 2017 Quarter 2

Quantity	LineNumber	Description	Unit	Ext. Total O&P	Labor Type	Data Release	CCI Location	Notes
35	024119192040	Selective demolition, rubbish handling, 0 - 100' haul, load, haul, dump and return, hand carried, cost to be added to demolition cost	C.Y.	\$ 2,089.85	RR	Year 2017 Quarter 2	TEXAS / HOUSTON (770-772)	
35	024119193040	Selective demolition, rubbish handling, 50' haul, loading & trucking, hand loading truck, cost to be added to demolition cost	C.Y.	\$ 2,027.20	RR	Year 2017 Quarter 2	TEXAS / HOUSTON (770-772)	
9	024119200100	Selective demolition, dump charges, typical urban city, building construction materials, includes tipping fees only	Ton	\$ 729.00	RR	Year 2017 Quarter 2	TEXAS / HOUSTON (770-772)	
1600	070505100120	Selective demolition, thermal and moisture protection, downspouts, including hangers	L.F.	\$ 1,616.00	RR	Year 2017 Quarter 2	TEXAS / HOUSTON (770-772)	
2150	070505100420	Selective demolition, thermal and moisture protection, gutters, metal or wood, edge hung	L.F.	\$ 3,182.00	RR	Year 2017 Quarter 2	TEXAS / HOUSTON (770-772)	
2150	070505102270	Selective demolition, thermal and moisture protection, roof edge, gravel stop	L.F.	\$ 795.50	RR	Year 2017 Quarter 2	TEXAS / HOUSTON (770-772)	
2150	070505103730	Selective demolition, thermal and moisture protection, roofing, built-up, embedded gravel removal	S.F.	\$ 1,913.50	RR	Year 2017 Quarter 2	TEXAS / HOUSTON (770-772)	
2150	075216101800	SBS modified bituminous membrane, smooth surface flashing, 150 mils	S.F.	\$ 7,009.00	RR	Year 2017 Quarter 2	TEXAS / HOUSTON (770-772)	
1075	075216102020	SBS modified bituminous membrane, roofing asphalt, 20 to 30 mils	S.F.	\$ 881.50	RR	Year 2017 Quarter 2	TEXAS / HOUSTON (770-772)	
2150	077119101360	Gravel stop, galvanized steel, plain, with continuous cleat, 4" leg, 6" face height, 24 gauge	L.F.	\$ 22,489.00	RR	Year 2017 Quarter 2	TEXAS / HOUSTON (770-772)	
		RS Means Unit Cost Total		\$ 42,732.55				
		Total with Coefficient (.84 x RS Means Total)		\$ 35,895.34				
		2% Bond (Any additional Pass-Through Costs)		\$ 717.91				
		Total Project Quote		\$ 36,613.25				



Review the JOC Quote!



CCI location



Division 1



Coefficient



Adjustment Factors



O & P Pricing



Data release (most recent)

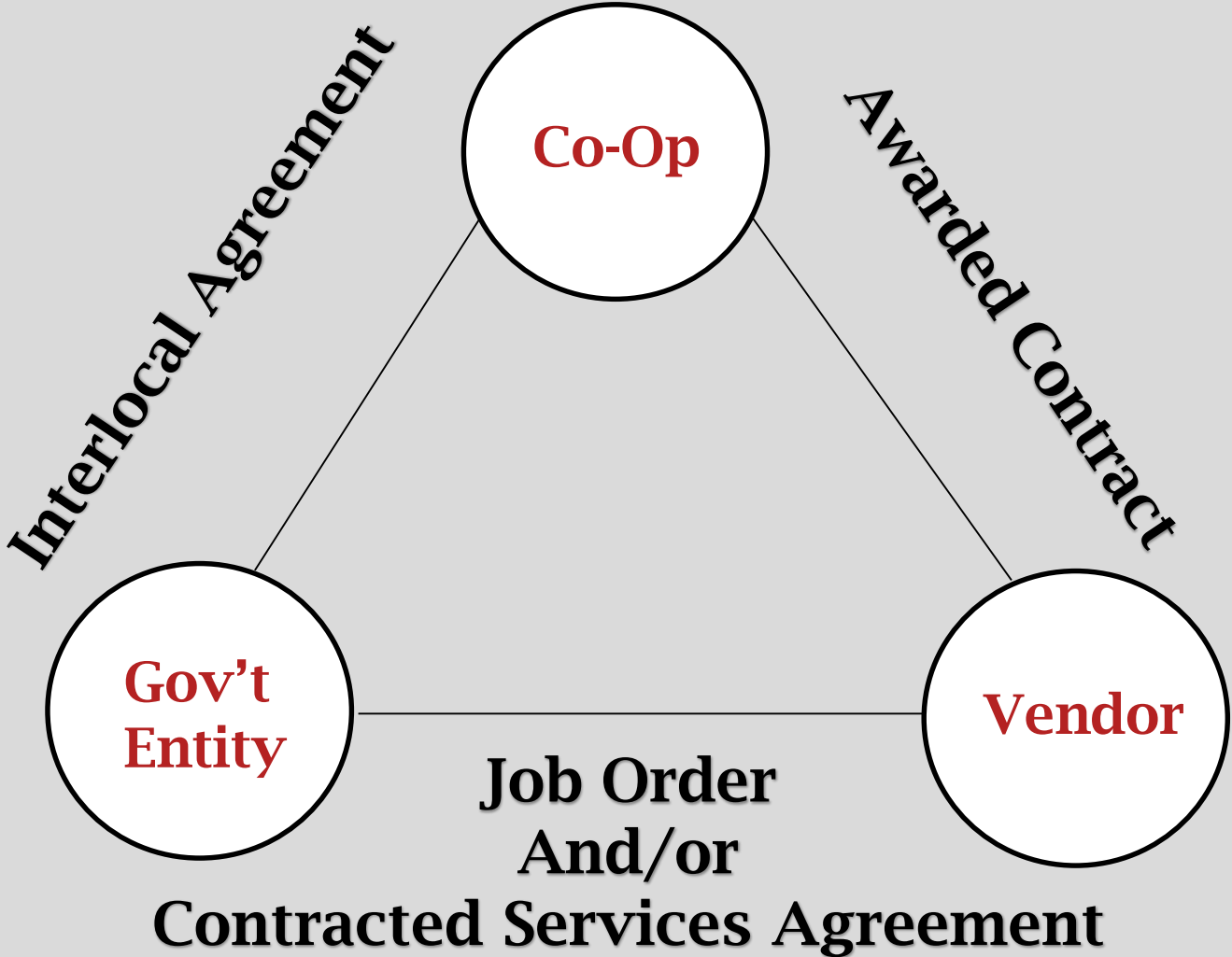


Non pre-priced items



Attempts to pass-through co-op fee

The Relationships



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 District and Vendor

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

TEX. GOV'T CODE § 2269.410



Contracted
Services Agreement

The Job Order

- The **Job Order** is an attachment to the Job Order Contract (typically Attachment “A”):
 - Formally written
 - Project-specific
 - Owner authorization to provide a lump sum, fixed priced estimate
 - Based on the owner/contractor team’s defined scope of work.
 - Include Owner’s adopted prevailing wage rates as an attachment (required on all Public Works Projects) – Typically Attachment “B”



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
 - 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 (Governing Body)?

- **Determination of construction services project delivery method (if other than CSP)**
- 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
- Board may act to delegate all of the above powers (CH or CV Local)
- **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

Bidding vs. Quoting

Bid / Proposal:

- formal
- written
- sealed response
- satisfies the state's procurement requirements
- When using federal funds, must be 2 CFR Part 200 (EDGAR) compliant

Quote:

- job-specific price in writing
- based on vendor's previously bid & awarded contract coefficient
- When using federal funds, one of three quotes must be from a minority-owned or woman-owned business

Takeaways

- 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 Co-ops are created equal, are in State, or are 2 CFR Part 200 (EDGAR) compliant
- Board (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, CTSBS
Sr. Manager of Facilities Planning
6005 Westview Dr.
Houston, TX 77055
Office: 713-696-8252
Cell: 281-773-3036



ChoicePartners.org

Navigating Choice Partners website

- Requesting Login & password
- Logging in
- Searching contracts and vendors
- Investigating suppliers and documentation



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?](#)



Due Diligence

Balfour Company Print Info.

Contract Category: Award Jackets, Screen Printing and Embroidery

Contract Number: 15/039KC-01

Contract Terms:

Initial Award Date: August 18, 2015
1st Renewal Start Date: August 18, 2016
2nd Renewal Start Date: August 18, 2017
3rd Renewal Start Date: August 18, 2018
Current Expiration Date: August 17, 2019
Renewal Options Remaining: 1

CP Contract Manager:
Karen Chesky
karen@choicepartners.org
713-681-6052

Contract Partner: Balfour Company

balfour.

Contract Partner Web Site:
<http://www.aaljackets.com>

Approved Market Area: TX

APPROVED PRODUCT OR SERVICE:
Award jackets, screen printing and embroidery services & products.

TO PLACE AN ORDER:
The customer can email, fax, or mail us a request for a quote. We will respond and if accepted we will order the product. Upon receipt of a purchase order from customer. Please include Choice Partners contract # on all POs.

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

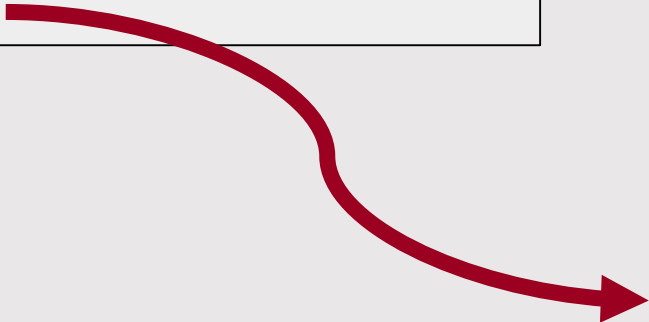
Freight Terms: -

HUB Status: No

MWBE Status: No

SBE Status: No

DUE DILIGENCE: [Download](#)





Supply Catalog

Supply Catalog

- 1100 line items competitively bid every 2 years
- Single awards
- Catalog Discount Percentage also provided
- eCatalog system allows members to create draft orders





FAQ's

[Home](#) > [About Us](#) > [Frequently Asked Questions](#)

About Us

About Choice Partners

All-in-One Cooperative

Procurement Process

Member Reviews

FAQs

Current News

Vendor Spotlight

Events

Presentations

Contact Us

Frequently Asked Questions

Q : 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 : 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 : What does it cost to use Choice Partners?

A : There is no charge to client members to use Choice Partners national cooperative contracts; vendor partners pay a small percentage fee back to Choice Partners.



Looking forward to working with you!

www.choicepartners.org

**Contact
Choice Partners
and get started!**



Contact information



The Right Resources. Right Now.

6005 Westview | Houston TX 77055

Tel 713-696-0786 OR 877-696-2122

www.choicepartners.org

Follow us

www.twitter.com/choice_partners

www.linkedin.com/company/choice-partners

Email: info@choicepartners.org

www.choicepartners.org/membership



Contacts

Billing

Arlita – supplyreporting@choicepartners.org

Kay – supplyreporting@choicepartners.org

Jan – facilityreporting@choicepartners.org

Doris – foodreporting@choicepartners.org

Joanna – supplyreporting@choicepartners.org

Sr. Manager of Facilities Planning(HCDE)

Stephen – skendrick@hcde-texas.org

Director

Jeff Drury – jeff@choicepartners.org

Contract Managers

Joann – joann@choicepartners.org

Karen – karen@choicepartners.org

Kristi – kristi@choicepartners.org

Michael – michael@choicepartners.org

Trisha – trisha@choicepartners.org

Client Engagement

Janet – janet@choicepartners.org