

Growing your business

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



STAFF INTRODUCTIONS





VENDOR ORIENTATION AGENDA

May 12, 2020

PART 1 (10 a.m. to 11:15 a.m.)

10 to 10:15 a.m.

Welcome and Introduction (Jeff Drury)

10:15 to 10:40 a.m.

Choice Partners Cooperative (Kristi Dion) (WIN-WIN-WIN, Legal Requirements, Check List, Supply Catalog)

10:40 to 11:15 a.m.

Growing Your Business (Janet Wachs)

PART 2 (11:15 a.m. to 12:30 p.m.)

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

Job Order Contracting (Stephen Kendrick)

12:15 -12:30 p.m.

Closing (Jeff Drury)



WELCOME

Jeff Drury

Director, Choice Partners

Contract is broader than HCDE

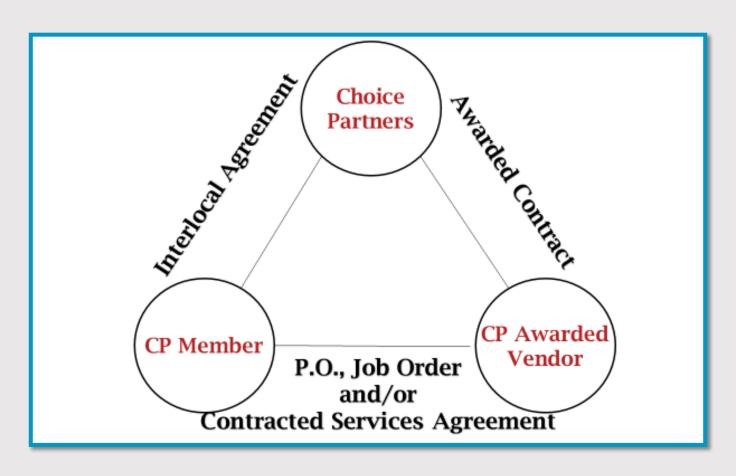
School districts, charter schools, counties, municipalities, colleges, universities

WIN - WIN - WIN

How can we help you?



WIN, WIN, WIN





HCDE, A GOVERNMENTAL ENTITY

Harris County Department of Education

in Harris County, Texas; it is not a County agency. HCDE is a governmental agency serving Harris County schools since 1889.

Taxing Authority

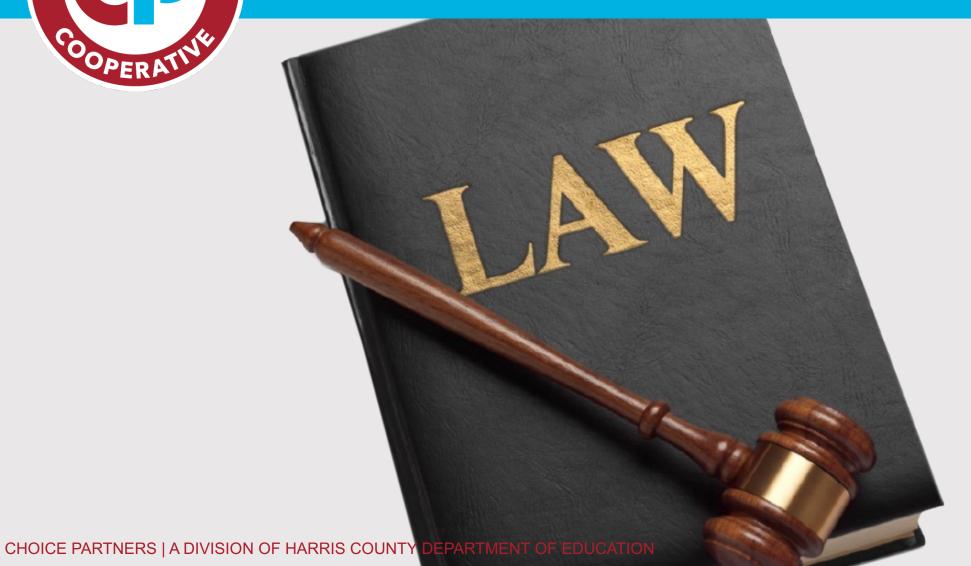








LEGAL REQUIREMENTS





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





CONTRACTS

Educational



Facility Services







Supplies and Services



Technology



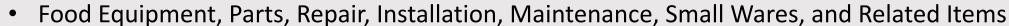
The Right Resources. Right now.



FOOD / CAFETERIA CONTRACTS



- Chemical Products and Services
 - Commercial Food Distributor
- Commodity Processing of USDA Foods
 - Dairy Products



- Fresh Bread Products
 - Fresh Produce
- Frozen and Chilled Beverages
 - Ice Cream
 - Pizza Delivery
 - Snacks and Beverages
- Technical Services & Products for Food Service







SUPPLY CATALOG ORDERING

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











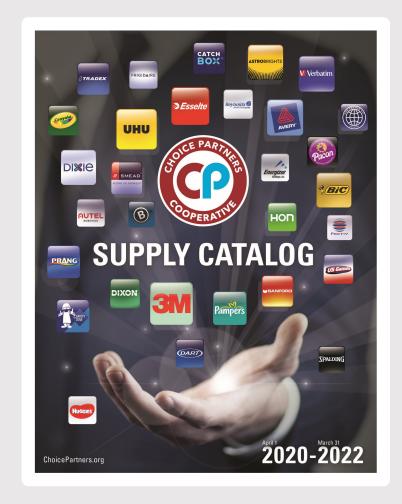






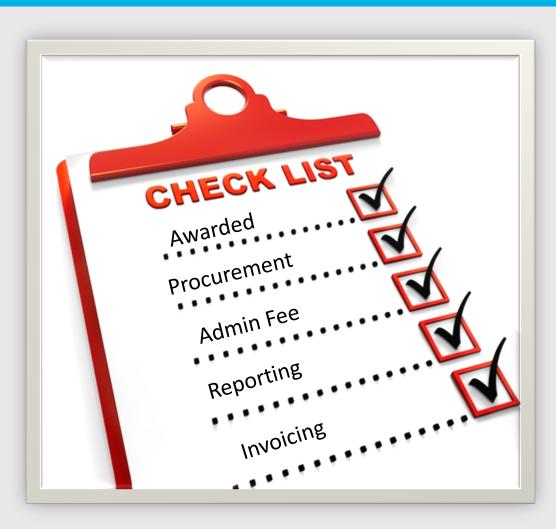








CHECK LIST





Reporting Template - Commodities

	Choi	ce Partners Monthly	Reportin	g Form	
	When	complete email to supplyrepor	ting@choicepar	tners.org	
	Vendor Name:				
	Month Ending:				
	Year:				
Nan	ne of Person Submitting:				
	Email Address:				
	Date:				
30	Please list	the correct contract num	nber for each	entity's sale	Contract Number
1					
2					
3					
4					
5					
6					
7					
8					
			1		
9 T	\$0.00	TOTAL			



Reporting Template – J.O.C

ubmit to: facilityreporting@choicepartners.org ontract Number:		Month:							
HCDE Completed Projects									
Vendor Job Number	Customer Name	Purchase Order Number	Work Description	Projected Comp. Date	Current Billing Amount	PO Amount	Bond/ Permit Cost	Comments	
					9 9) 9 9)				
					2				
					3 3 3				
		r.;	HCDE Active Proje						
Vendor Job Number	Customer Name	Purchase Order Number	Work Description	Physical % Complete	Current Billing Amount	PO Amount	Bond/ Permit Cost	Comments	
					3				
					3				
5 2					e				
	Vendor Job Number	Vendor Job Number Name Vendor Job Customer Name Vendor Job Customer	Vendor Job Number Purchase Order Number Vendor Job Customer Number Vendor Job Customer Purchase Order Purchase Order Number	Vendor Job Number Purchase Order Number Work Description HCDE Completed Provided Pr	Vendor Job Number Purchase Order Number Work Description HCDE Completed Projects Projected Comp. Date Purchase Order Number Work Description HCDE Active Projects Vendor Job Customer Purchase Order Projected Comp. Date Physical %	Vendor Job Number Name Purchase Order Number Work Description Projected Comp. Date Amount HCDE Completed Projected Comp. Date Amount HCDE Active Projects Vendor Job Customer Purchase Order Number Work Description Physical Current Billing Amount HCDE Active Projects Vendor Job Customer Purchase Order Purchase Order Purchase Order Purchase Order	Vendor Job Number Purchase Order Number Work Description Projected Comp. Date Amount Amount HCDE Completed Projected Comp. Date Amount Amount Projected Comp. Date Amount Amount Amount Amount HCDE Active Projects Vendor Job Customer Purchase Order Purchase Order Purchase Order Purchase Order Purchase Order Polymore Purchase Order Pur	Vendor Job Number	



Resources

Marketing Resources

Your Marketing Resource Center

Choice Partners wants to work with all contract holders to help expand and grow your business, using your Choice Partners awarded contract. Please let your contract manager or the HCDE Client Engagement (713-696-1379) know how we can help.

Contract holders may use their contract for the region (ESC region map) or state it was proposed and awarded. While contract use is NOT limited to Texas, good resources for Texas government may be found in the tips to market to government entities document and a quick reference list of member entities is here. Quick List of current vendor contracts list here.

Become a Featured Vendor

After you have used your Choice Partners contract and have several satisfied customers, you may request to be a featured vendor. Client Engagement will

Dashboard

<u>View Vendors</u>

View Members

<u>Marketing Resources</u>

<u>Partners Messages</u>

Reporting Sales

Bond Elections

<u>Graphics</u>

eBid

Logout



GROWING YOUR BUSINESS

- Where do you begin? What is your target?
- Members vs. nonmembers?
- Get referrals from existing members including within the same organization.
- Can you collaborate with a Choice Partners contract holder?





VENDOR LOGIN

Vendor Login

If you have a contract awarded by Choice Partners, you may log-in below to view partner resources and current RFPs.

If you do not have a contract awarded by Choice Partners and want to view current RFPs or respond to an RFP, log-in below with your username and password. If you do not yet have a log-in, click on **Set Up New Account** Below.

USERNAME

PASSWORD



LOGIN

Helpful Links

Set Up a New Account
Forgot your password? Click here
to reset password, then close the
popup window to login on this
page again.



VENDOR DASHBOARD

Marketing Resources

Find marketing tips,

conference/membership lists,

reporting files and more

Vendor Dashboard

Welcome Admin Admin

As a Choice Partners vendor with a legal, competitively bid contract awarded by the HCDE governing board, you will have access to information just for awarded contract partners.

You may:

- · View your contract information page as members see it
- · Access the list of members
- · Login to eBid system

Please contact your contract manager or call 877-696-2122 for help and information you need.

View Vendors

Search vendors by name, contract title, or contract number

Partners Messages

Get latest vendor news and view new members

View Members

Search members by name, type, state and region

eBid

Go to ebid and view/respond to current bids

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



MARKETING REQUIRED

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

OPTIONAL: (coordinate with us)

- Ads in statewide publications
- Targeted emails



MARKETING RESOURCES - CP SEAL

Marketing Resources

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Download Choice Partner Seal

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



FEATURED VENDOR

Become a Featured Vendor

- Have 3+ members (not from same entity) that have used your contract and are satisfied. They must be willing to be interviewed and quoted.
- Complete request form found on Marketing Resources page and return to contract manager.
- Be interviewed by Client Engagement and your contract manager. CE will interview contacts.
- Vendor to review article before release.

The article will be published in the Leader's Choice newsletter sent electronically to members and vendors on a monthly basis. The publication is posted on the CP website with a web banner plus a link to the story and distributed by field reps and conference exhibit booth staff.



MEMBER CONTACT LIST

Vendor must:

- display Choice seal on your website home page (or landing page);
- link CP seal on vendor website to vendors page within Choice website; and
- provide proposed marketing material to be used with the list for review.

Client Engagement will:

- review the language of your marketing email to reflect vendor status; and
- provide a contact list of members.

Ask your contract manager to provide you the contact request form after you have complied with requirements.



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 of current contracts

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CMAT

March 31, 2020

Food

Supply Catalog

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



DUE DILIGENCE / PARTNERSHIP



Contract Category: Construction-

JOC (JOC-IDIQ)

Contract Number: 16/054JN-04

Contract Terms:

Initial Award Date: August 16, 2016 1st Renewal Start Date: August 16, 2018 2nd Renewal Start Date: August 16, 2019 Current Expiration Date: August 15, 2020 Renewal Options Remaining: 1

CP Contract Manager:

Joann Nichols joann@choicepartners.org 713-696-2122



Contract Partner: Facilities Sources



Contract Partner Web Site:

http://www.facilitiessources.com

Approved Market Area: TX



APPROVED PRODUCT OR SERVICE: Maintenance, repair, alteration, renovation, remediation, or minor construction of a facility when the work is of a recurring nature but the delivery times, type and quantities of work are indefinite.

TO PLACE AN ORDER: Contact the vendor for all your pricing needs, stating you are using CP contract and send us the confirmation only Purchase Order copy

PRICING: Coefficient on file. Email confirmation copies of all PO\'s to

ecatalog@choicepartners.org

Freight Terms: N/A HUB Status: Yes

MWBE Status: No

SBE Status: Yes

DUE DILIGENCE: Download

ABOUT THIS PARTNER:

With specialty licenses for electrical, mechanical and plumbing services, DPFS, Ltd. is able to efficiently coordinate all phases of construction, providing maximum productivity, quality and safety to its customers. This unique combination of services under one roof means one team is efficiently completing the job, ensuring maximum productivity and quality, at the least possible price, adding to customer satisfaction. Dura Pier Facilities Services foundation for success is the ability to plan and manage projects within budgets and within demanding schedules.



GET A QUOTE

Members select a category of contract.

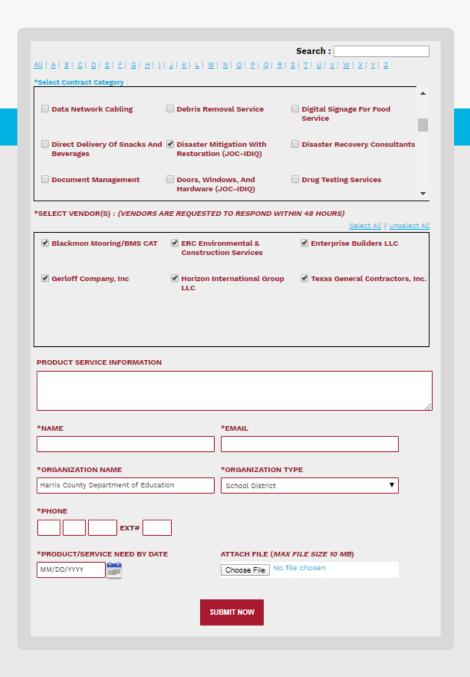
Then select desired vendor(s).

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





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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

Balfour Company

Contract Category: Graduation Items, Yearbooks & Commemorative

tems

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.aaljackets.com

Approved Market Area: National

CONTACT INFO

For SALES

Butch Milks

8525 Westland West Blvd Houston, Texas 77041 Phone: 832-912-8000 Cell Phone: 713-882-3222

Fax: 832-912-8005

butchm@balfourhouston.c

om

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

Pax: 852-912-8005

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	713-696-1337
Michael Robles, RTSBA	Contract Manager	713-316-4254
Monigue Joseph	Contract Manager	713-316-4259
Steve Gibson	Contract Manager	713-681-6052
Janet Wachs	CE Asst. Director	832-808-0055
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
<u>Laura Sprehe</u>	Contract Coordinator/Food	713-696-8213
Arlita Kyles, CTSBO	Contract Specialist	713-696-8241
Yvonne Johnson	General Office Clerk II	713-696-1886
Kay Vorish, CTSBO	Contract Clerk	713-696-0743
Shandra Powell	Clerk - General Office	713-696-1389
Don Elder, Jr.	Field Representative	281-520-1472
Fred Calhoun	Field Representative	713-203-5365
Phillip Vasquez, CPPB	Field Representative	214-668-9234
Ann Marie Harbour	Field Representative	817-703-7901
Jeff Drury	Director	713-696-0786



ACTION ITEMS AND TAKEAWAYS

- 1. Review Vendor Dashboard
- 2. Review Market Resources Page
- 3. Share how member can get login ID with your sales staff
- 4. Contract managers have request forms for member contact lists
- 5. If not a construction vendor, take following survey



SURVEY

If Non-JOC Vendor:

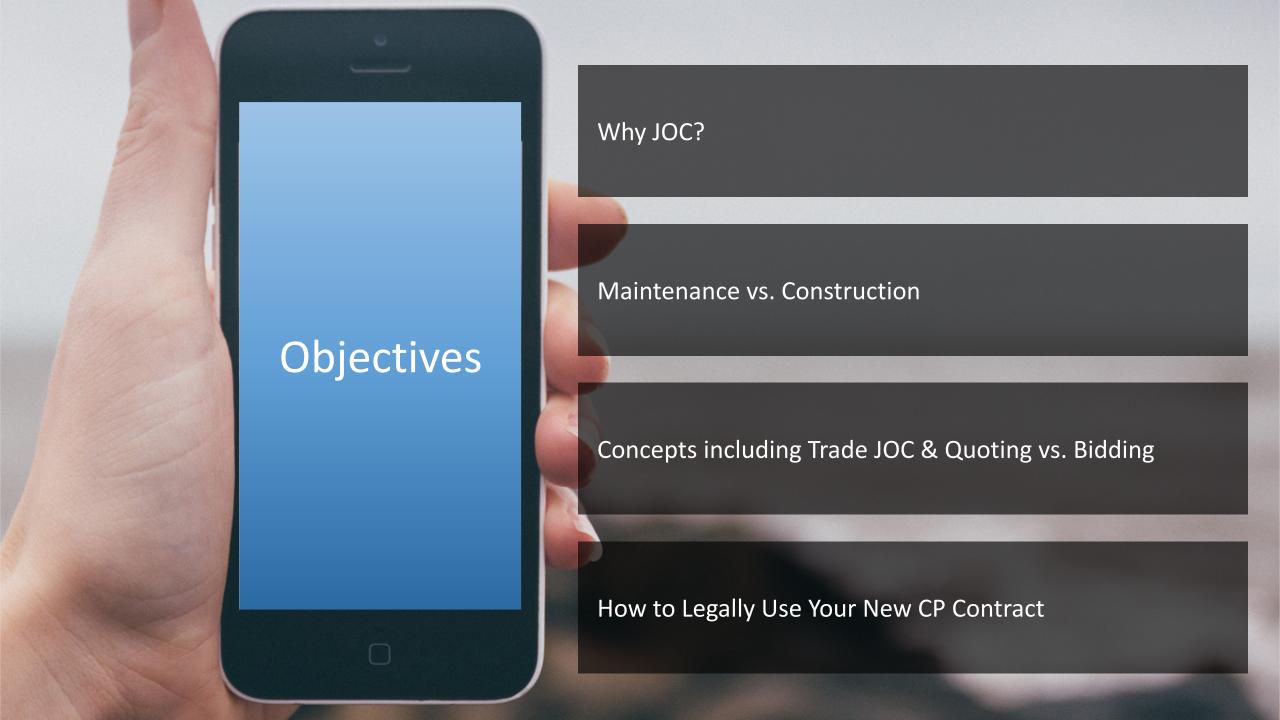
Complete your survey at this time





Job Order Contracting

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



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)



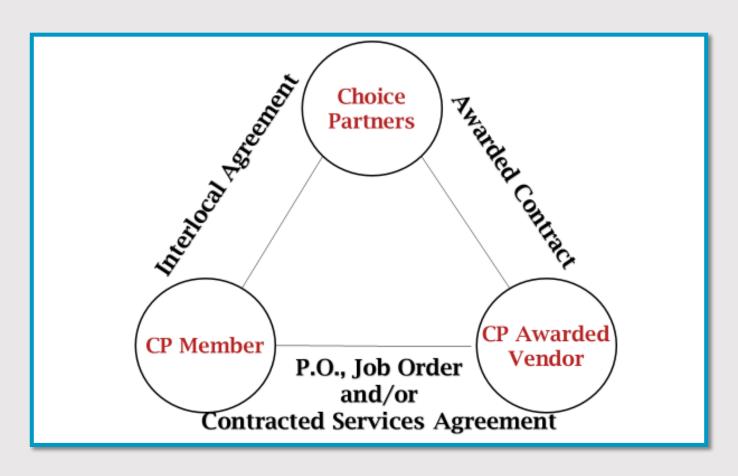
Repair & Maintenance

Construction Services

OSHA Letter to Raymond Knobb (11.18.2003)



WIN, WIN, WIN



Using 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	ample				
							_				
Vendor Na	ame										
Job Descr	iption										
Choice Pa	rtners Contract #18	3/036MC-XX									
Data Relea	se : Year 2019 Quar	ter 2									
Juliu I toloc	. 10di 2010 Q ddi										
					TOTAL						
Quantity	LineNumber	Description	Unit	O&P		Ext.	Total O&P	Labor Type	Data Release	CCI Location	Notes
									Year 2019 Quarter		Insert any notes to
									2 (Use most		describe where wor
									updated available		being done, what is
		Central station air handler, up thru 15 ton, selective							at time quote is		being provided in th
10	230505100400	demolition	Ea.	\$	579.25	\$	5,792.50	RR	requested)	TEXAS / HOUSTON (770-772)	line item, etc
		Rooftop air conditioner, single zone, electric cool,					, , , , , , , , , , , , , , , , , , , ,		, ,	, ,	·
		gas heat, 3 ton cooling, 60 MBH heating, includes,							Year 2019 Quarter		
1			Ea.	\$	4,359.00	\$	4,359.00	RR	2	TEXAS / HOUSTON (770-772)	
•	201 100 10 1100	Rooftop air conditioner, single zone, electric cool,		+	1,000.00	<u> </u>	1,000.00		_	1251107110001011 (110112)	
		gas heat, 7.5 ton cooling, 170 MBH heating,							Year 2019 Quarter		
3		, ,	Ea.	\$	8.213.65	\$	24.640.95	RR	2	TEXAS / HOUSTON (770-772)	
	207 100 10 1100	Rooftop air conditioner, single zone, electric cool,		Ψ	0,210.00	Ψ	21,010.00	144		12/10/11/00/10/10/11/2)	
		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	DD	2	TEXAS / HOUSTON (770-772)	
	237433101130	Rooftop air conditioner, single zone, electric cool,	∟a.	۳	9,733.10	φ	9,733.10	INN		1EAS / 1100310N (770-772)	
		gas heat, 10 ton cooling, 200 MBH heating,							Year 2019 Quarter		
2		5, 5,	Ea.	\$	12,186.50	¢	24,373.00	DD	r ear 2019 Quarter	TEXAS / HOUSTON (770-772)	
	237433101100	Rooftop air conditioner, single zone, electric cool,	⊏a.	Ψ	12, 100.30	φ	24,373.00	INIX		1EA3 / 1100310N (770-772)	
		gas heat, 12.5 ton cooling, 230 MBH heating,							Year 2019 Quarter		
			F-	\$	12 014 00	•	42 044 00	DD	real 2019 Quarter	TEVAC / HOUGTON (770 770)	
1	237433101170	includes, standard controls, curb and economizer	Ea.	Э	13,614.90	Ф	13,614.90	KK	2	TEXAS / HOUSTON (770-772)	
		Rooftop air conditioner, single zone, electric cool,							V 0040 O 1		
		gas heat, 15 ton cooling, 270 MBH heating,	_		40.000.00		00.070.00		Year 2019 Quarter	TEXA 0 (10 10 TOX 770 TOX	
2	237433101180		Ea.	\$	16,839.60	\$	33,679.20	RR	2	TEXAS / HOUSTON (770-772)	
		Curbs/pads prefabricated, pad, condenser,							V0040 0		
		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	KK	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				\$		***Optional if yo	u need to give additiona	I discount to be competitive.	
		2% Bond (Any additional Pass-Through Costs)				\$	2,440.11				
		Total Project Quote				\$	124,445.37				
		J					,				

Review the JOC Quote!





Coefficient

Adjustment Factors

- O & P Pricing
- Data release (most recent)
- Non pre-priced items
- Attempts to pass-through co-op fee



JOC/IDIQ – The JOB Order

- District issued
- Signed by both parties
- States scope of work and price of assigned tasks
- Provides Owner's Adopted Prevailing Wage Rates





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 the procurement method with your client PRIOR to quoting the job
- <u>CP contract number</u> put on <u>BOTH</u> <u>Quote</u> & <u>P.O.</u>
- CP needs to receive:
 - (1) confirming copy of each PO issued
 - (2) monthly reporting to CP (completes legal procurement process for your client & keeps them in legal compliance)



Survey

JOC Vendor:

Complete your survey at this time





Looking forward to working with you!





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



Contacts

Billing

Arlita – arlita@choicepartners.org

Jan – jan@choicepartners.org

Kay – <u>kay@choicepartners.org</u>

Contract Managers

Joann – joann@choicepartners.org

Kristi – kristi@choicepartners.org

Michael - michael@choicepartners.org

Monique - monique@choicepartners.org

Steve – steve@choicepartners.org

Trisha – trisha@choicepartners.org

Reporting

Facility – facilityreporting@choicepartners.org

Food - foodreporting@choicepartners.org

Supply – supplyreporting@choicepartners.org

Marketing

Janet – janet@choicepartners.org

jwachs@hcde-texas.org

Stephanie – <u>sdelossantos@hcde-texas.org</u>

Contract Compliance

Mary - mary@choicepartners.org