The Right Resources. Right Now.
MEET THE CP STAFF

Pre COVID-19!!
**MEMBER TRAINING AGENDA**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00 to 10:15 a.m.</td>
<td>Welcome and Introduction</td>
</tr>
<tr>
<td>10:15 to 10:40 a.m.</td>
<td>Choice Partners Cooperative Legal Requirements</td>
</tr>
<tr>
<td>10:40 to 11:40 a.m.</td>
<td>Job Order Contracting</td>
</tr>
<tr>
<td>11:40 a.m. to 12:15 p.m.</td>
<td>Navigating the Website</td>
</tr>
<tr>
<td>12:15 - 12:30 p.m.</td>
<td>Closing</td>
</tr>
</tbody>
</table>
WIN, WIN, WIN
HCDE is a governmental entity serving Harris County schools since 1889.

HCDE is located in Harris County, Texas; it is not a County agency.

Taxing Authority
THE 5 PILLARS WE SUPPORT

- GRADUATE DEDICATED PURPOSEFUL CATALYST PERSISTENT
- IMPACT ENGAGE DISCOVER ACHIEVE
- SUCCESS EDUCATION PREPARE NUTRITION HEALTH
- STUDENT ACADEMIC ACHIEVER SCHOLAR OPPORTUNIST LEARNER
- TREATMENT HELPFUL BENEFIT UNDERSTANDING PATIENCE INSPIRE ANALYSIS

STUDENTS AND EDUCATORS SERVED

- ADULT EDUCATION 9,121
- CASE FOR KIDS 17,417
- 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 REQUIREMENTS
## 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

FOOD/CAFETERIA | TECHNOLOGY | COMMODITIES | SERVICES | FACILITIES
Job Order Contracting (JOC)
Objectives

- Why JOC?
- Maintenance vs. Construction
- Concepts including Trade JOC & Quoting vs. Bidding
- How to Legally Use Your New CP Contract
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
• 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)
• 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
<table>
<thead>
<tr>
<th>Quantity</th>
<th>LineNumber</th>
<th>Description</th>
<th>Unit</th>
<th>O&amp;P</th>
<th>Unit 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>10</td>
<td>239595100100</td>
<td>Central station air handler, up thru 15 ton, selective demolition</td>
<td>ea</td>
<td>$579.25</td>
<td>$5,792.50</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>1</td>
<td>237433101120</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>3</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>1</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>$9,733.10</td>
<td>$9,733.10</td>
<td>RR</td>
<td>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>237433101170</td>
<td>Rooftop air conditioner, single zone, electric cool, gas heat, 12.5 ton cooling, 220 MBH heating, includes, standard controls, curb and economizer</td>
<td>ea</td>
<td>$13,186.50</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>1</td>
<td>237433101180</td>
<td>Rooftop air conditioner, single zone, electric cool, gas heat, 15 ton cooling, 270 MBH heating, includes, standard controls, curb and economizer</td>
<td>ea</td>
<td>$16,839.60</td>
<td>$33,679.20</td>
<td>RR</td>
<td>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
<td></td>
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<tr>
<td>100</td>
<td>239110106100</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></td>
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<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>$9,898.76</td>
<td>$9,898.76</td>
<td>RR</td>
<td>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
<td></td>
</tr>
</tbody>
</table>

Insert what you bid

<table>
<thead>
<tr>
<th>Quantity</th>
<th>LineNumber</th>
<th>Description</th>
<th>Unit</th>
<th>O&amp;P</th>
<th>Unit Total O&amp;P</th>
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</thead>
</table>

RS Means Unit Cost Total | $75,519.46 | $135,561.41 |

Insert what you bid

Total with Coefficient (1.6 x RS Means Total) | $135,561.41 |

Additional Discount of 20% good for current project only | $122,005.27 |

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
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 District
- 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
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
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
  \[\text{TEX. GOVT CODE § 791.011(j)}\]

• Architect required for:
  • A new building having construction costs exceeding $100,000
  • An alteration or addition having construction costs exceeding $50,000
  \[\text{TEX. OCC CODE § 1051.703}\]

• 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)
  \[\text{TEX. OCC CODE § 1001.053}\]
What Must Go to the Board?

- Determination of construction services project delivery method (if other than Competitive Sealed Proposals (CV LOCAL)).
- 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) (Delegated to Supt. for purchases under $100,000)
- 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

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.
• Establish the procurement method with your client PRIOR to quoting the job

• **CP contract number** – put on BOTH - Quote & P.O.

• 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)
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?
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

**Food**

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

**RECENT ACTIVITY**
- **2020 April Press Release**
  April 20, 2020
- **February 2020 Press Release**
  March 5, 2020

**EVENTS**
- **TASBO Annual Conference**
  March 2, 2020
- **Texas Library Association**
  March 24, 2020
- **CMAT**
  March 31, 2020
SUPPLY CATALOG ORDERING

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

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 10, 2019
3rd Renewal Start Date: August 16, 2020
Current Expiration Date: August 15, 2021
Renewal Options Remaining: 0

CP Contract Manager:
Joann Nichols
joann@choicepartners.org
713-696-2122

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 POY’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.
• 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

SELECT AN EVENT

TML 2020 Annual Conference (Virtual) (October 14, 2020)

TML 2020 Annual Conference (Virtual) (October 14 - 16, 2020)

Texas Municipal League 2020 Annual Conference October 14-16, 2020
The 2020 TML Annual Conference and Exhibition will be held as a virtual event, offering the same great content and opportunities to connect with other city officials, speakers, exhibitors, and sponsors.
FAQ’s

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.
Balfour Company

**Contract Category:** Graduation Items, Yearbooks & Commemorative Items

**Contract Number:** 19/012KC-01

**Contract Terms:**
- Initial Award Date: February 27, 2019
- 1st Renewal Start Date: February 27, 2020
- Current Expiration Date: February 26, 2021
- Renewal Options Remaining: 2

**CP Contract Manager:**
Steve Gibson
steve@choiceparterns.org
713-681-6052

**Contract Partner:** Balfour Company

**Contract Partner Web Site:**
http://www.asjackets.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.com

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joan Nichols, RTSBA</td>
<td>Assistant Director/Construction &amp; Commodities</td>
<td>877-696-2122</td>
</tr>
<tr>
<td>Trisha Prestige corpo, 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>Krist Nichols, RTSBA</td>
<td>Contract Manager</td>
<td>713-696-1337</td>
</tr>
<tr>
<td>Michael Hobbs, RTSBA</td>
<td>Contract Manager</td>
<td>713-316-4254</td>
</tr>
<tr>
<td>Marique Joseph</td>
<td>Contract Manager</td>
<td>713-316-4259</td>
</tr>
<tr>
<td>Steve Gibson</td>
<td>Contract Manager</td>
<td>713-681-6052</td>
</tr>
<tr>
<td>Laura Sternbe</td>
<td>Contract Manager/Food</td>
<td>713-696-8213</td>
</tr>
<tr>
<td>Janet Warka</td>
<td>CE Asst. Director</td>
<td>832-808-0055</td>
</tr>
<tr>
<td>Jim Arnold, CPA</td>
<td>Client Services Manager</td>
<td>713-696-0746</td>
</tr>
<tr>
<td>Mary Causay, MS, RTSBA</td>
<td>Contract Compliance Specialist</td>
<td>713-696-8270</td>
</tr>
<tr>
<td>Cora Day</td>
<td>Contract Coordinator</td>
<td>713-696-8208</td>
</tr>
<tr>
<td>Adina Kyle, CTSCO</td>
<td>Contract Specialist</td>
<td>713-696-8241</td>
</tr>
<tr>
<td>Yonne Johnson</td>
<td>General Office Clerk II</td>
<td>713-696-1886</td>
</tr>
<tr>
<td>Key Vanotch, CTSCQ</td>
<td>Contract Assistant</td>
<td>713-696-0743</td>
</tr>
<tr>
<td>Shandra Powell</td>
<td>Clerk - General Office</td>
<td>713-696-1389</td>
</tr>
<tr>
<td>Fred Callison</td>
<td>Field Representative</td>
<td>713-203-5365</td>
</tr>
<tr>
<td>Ann Marie Harbour</td>
<td>Field Representative</td>
<td>817-703-7901</td>
</tr>
<tr>
<td>Jeff Drury</td>
<td>Director</td>
<td>713-696-0786</td>
</tr>
</tbody>
</table>
Members:
Complete your survey at this time.
(YOUR FEEDBACK MATTERS!)
6005 Westview  |  Houston  TX  77055  
Tel 713-696-0786  or  1-877-696-2122

www.choicepartners.org

Follow us:
www.twitter.com/choice_partners
www.linkedin.com/company/choice-partners

Email: info@choicepartners.org  or  jeff@choicepartners.org
Contacts

**CP Management**
- Jeff: jeff@choicepartners.org
- Joann: joann@choicepartners.org
- Trisha: trisha@choicepartners.org
- Stephen: skendrick@hcde-texas.org

**Contract Managers**
- Kristi: kristi@choicepartners.org
- Laura: laura@choicepartners.org
- Michael: michael@choicepartners.org
- Monique: monique@choicepartners.org
- Steve: steve@choicepartners.org

**Billing**
- Arlita: arlita@choicepartners.org
- Jan: jan@choicepartners.org
- Kay: kay@choicepartners.org

**Confirmation Only PO’s**
- ecatalog@choicepartners.org

**Marketing**
- Stephanie: sdelossantos@hcde-texas.org
- Janet: janet@choicepartners.org
The Right Resources. Right Now.

www.choicepartners.org