



**The Right
Resources.
Right Now.**



MEET THE CP STAFF



Pre COVID-19!!



MEMBER TRAINING AGENDA

10:00 to 10:15 a.m.

Welcome and Introduction

10:15 to 10:40 a.m.

*Choice Partners Cooperative
Legal Requirements*

10:40 to 11:40 a.m.

Job Order Contracting

11:40 a.m. to 12:15 p.m.

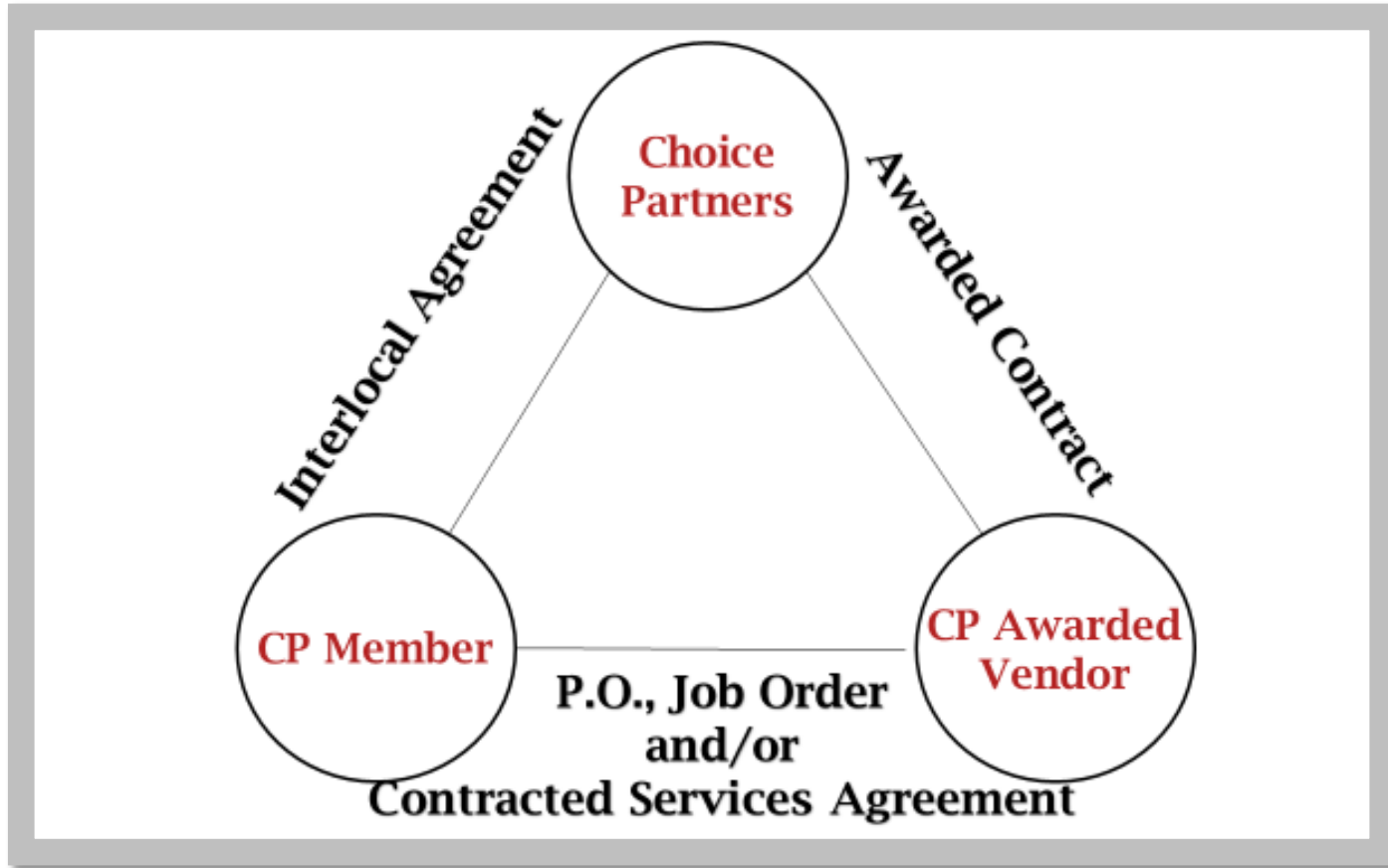
Navigating the Website

12:15 -12:30 p.m.

Closing



WIN, WIN, WIN





HCDE, A GOVERNMENTAL ENTITY

Harris County Department of Education

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

HCDE is a governmental agency serving Harris County schools since 1889.

Taxing Authority



THE 5 PILLARS WE SUPPORT

STUDENTS AND EDUCATORS SERVED

GRADUATE
DEDICATED
PURPOSEFUL
CATALYST
PERSISTENT

ADULT EDUCATION
9,121

IMPACT
ENGAGE
DISCOVER
ACHIEVE

CASE FOR KIDS
17,411

SUCCESS
EDUCATION
PREPARE
NUTRITION
HEALTH

HEAD START
3,409

STUDENT
ACADEMIC
ACHIEVER
SCHOLAR
OPPORTUNIST
LEARNER

SPECIAL SCHOOLS
729

TREATMENT
HELPFUL
BENEFIT
UNDERSTANDING
PATIENCE
INSPIRE
ANALYSIS

THERAPY SERVICES
13,898



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

 CHOICE PARTNERS
\$28 Million in Support for Districts

 EDUCATOR CERTIFICATION
1,489 Educators Served

 RECORDS MANAGEMENT
42 Government Agencies

 TEACHING AND LEARNING CENTER
9,200 Educators Served



LEGAL REQUIREMENTS





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



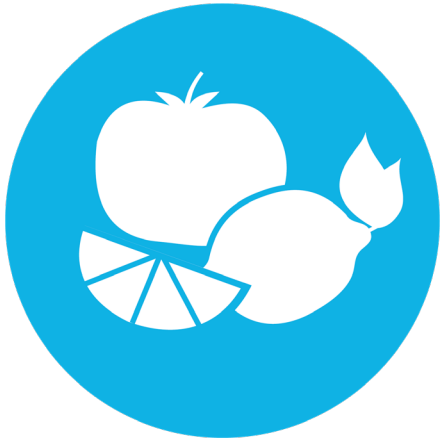
EDGAR/Uniform
Guidance (2 CFR 200)

HB 1295

TEC 51.9335
Higher Education



CONTRACTS



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

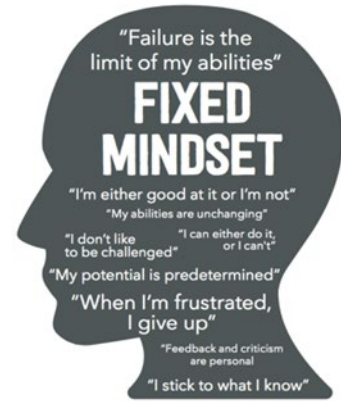


JOC/IDIQ – Why Job Order Contracting (JOC)

• 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)



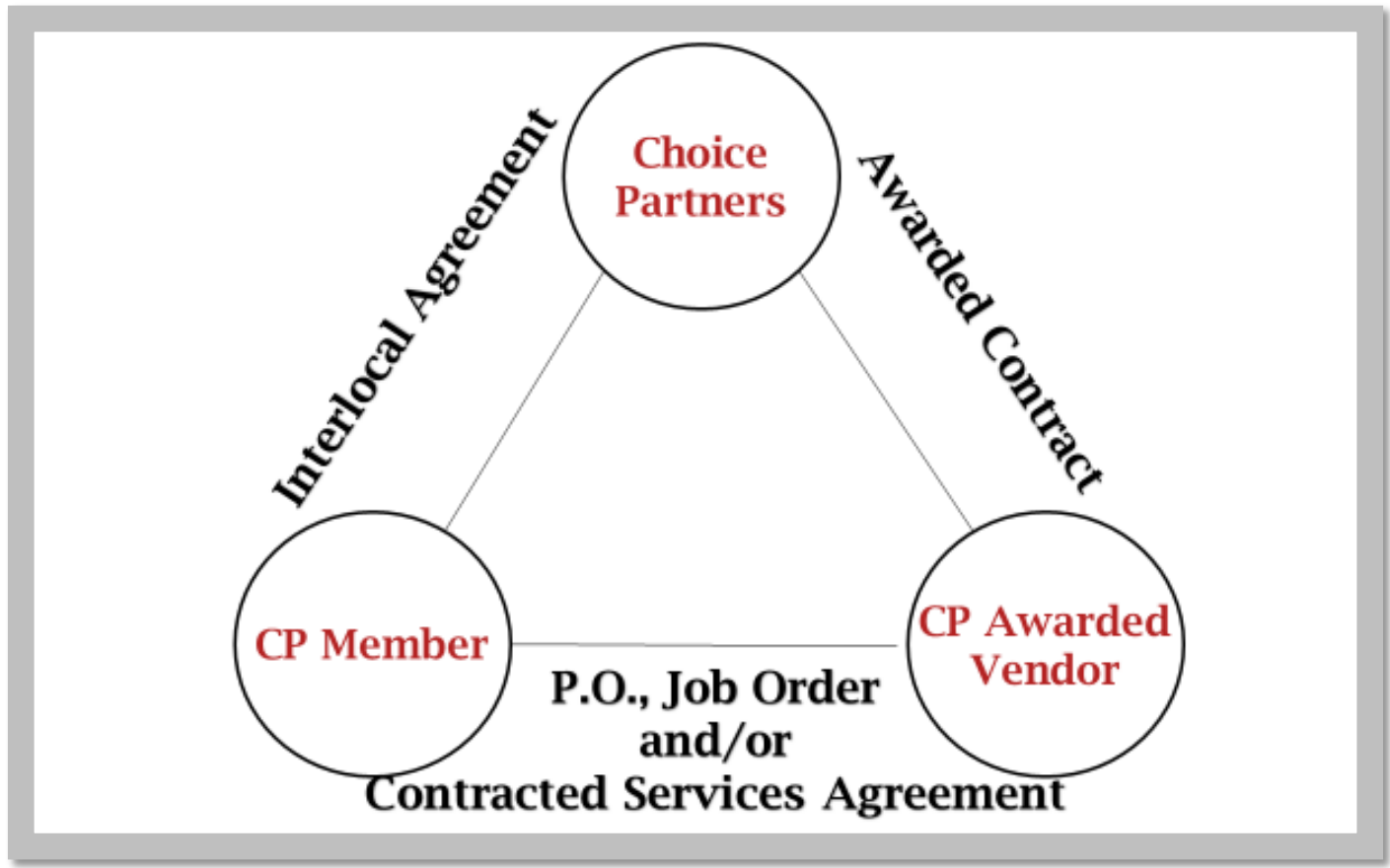
Repair &
Maintenance

Construction
Services

OSHA Letter to Raymond Knobb (11.18.2003)



WIN, WIN, WIN





JOC's procured by Purchasing Cooperatives

- Gov't Entity selects vendor without having to use its own competitive procurement process
- ONLY satisfies the **procurement** requirement, NOT the **contracting** requirement
- Statute **requires a written and signed** job order between the **vendor and the Gov't Entity** **TGC 2269.410(a)**
- Only construction method that allows for use of a cooperative in lieu of self-procurement
- Only method allowed to select contractors for future, undefined projects or tasks



JOC/IDIQ – What's an IDIQ/JOC Estimate?

- MUST contain:
 - CP Contract Number
 - Line item assessment based on Unit Price Book (UPB)
 - Localized by applying City Cost Index (CCI)
 - Legally bid coefficient

- Subcontractor pricing must be estimated using the UPB for ALL scope of work



JOC/IDIQ Estimate

HVAC Example									
Quantity	LineNumber	Description	Unit	O&P	Ext. Total O&P	Labor Type	Data Release	CCI Location	Notes
Vendor Name									
Job Description									
Choice Partners Contract #18/036MC-XX									
Data Release : Year 2019 Quarter 2									
				Total					
10	230505100400	Central station air handler, up thru 15 ton, selective demolition	Ea.	\$ 579.25	\$ 5,792.50	RR	Year 2019 Quarter 2 (Use most updated available at time quote is requested)	TEXAS / HOUSTON (770-772)	Insert any notes to describe where work is being done, what is being provided in this line item, etc
1	237433101100	Rooftop air conditioner, single zone, electric cool, gas heat, 3 ton cooling, 60 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 4,359.00	\$ 4,359.00	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
3	237433101150	Rooftop air conditioner, single zone, electric cool, gas heat, 7.5 ton cooling, 170 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 8,213.65	\$ 24,640.95	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
1	237433101156	Rooftop air conditioner, single zone, electric cool, gas heat, 8.5 ton cooling, 170 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 9,733.10	\$ 9,733.10	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
2	237433101160	Rooftop air conditioner, single zone, electric cool, gas heat, 10 ton cooling, 200 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 12,186.50	\$ 24,373.00	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
1	237433101170	Rooftop air conditioner, single zone, electric cool, gas heat, 12.5 ton cooling, 230 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 13,614.90	\$ 13,614.90	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
2	237433101180	Rooftop air conditioner, single zone, electric cool, gas heat, 15 ton cooling, 270 MBH heating, includes, standard controls, curb and economizer	Ea.	\$ 16,839.60	\$ 33,679.20	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
100	239110106050	Curbs/pads prefabricated, pad, condenser, fiberglass reinforced concrete with polystyrene foam core, 2" thick, 20" x 38"	Ea.	\$ 94.70	\$ 9,470.00	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
1	015433602720	Rent crane truck mounted, hydraulic, 100 ton capacity, Incl. Hourly Oper. Cost.	Week	\$ 9,898.76	\$ 9,898.76	RR	Year 2019 Quarter 2	TEXAS / HOUSTON (770-772)	
		RS Means Unit Cost Total		\$ 75,519.46	\$ 135,561.41				
		Insert what you bid			\$ 135,561.41				
		Total with Coefficient (1.0 x RS Means Total)			\$ 135,561.41				
		Additional Discount of XX% good for current project only			\$ 122,005.27				***Optional if you need to give additional discount to be competitive.
		2% Bond (Any additional Pass-Through Costs)			\$ 2,440.11				
		Total Project Quote			\$ 124,445.37				



Review the JOC Quote

- CCI location
 - Coefficient
 - O & P Pricing
 - Data release (most recent)
- Non pre-priced items
 - Attempts to pass-through co-op fee
 - Division 1
 - Adjustment Factors



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.”



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

TEX. GOV'T CODE § 791.011(j)

- Architect required for:
 - A new building having construction costs exceeding \$100,000
 - An alteration or addition having construction costs exceeding \$50,000

TEX. OCC CODE § 1051.703

- Exceptions to Engineering Services:
 - An engineer is **NOT** required for a public work project if:
 - A project involving electrical or mechanical engineering will cost **\$8,000 or less**
 - A project not involving electrical or mechanical engineering will cost **\$20,000 or less** (i.e., structural or civil)

TEX. OCC CODE § 1001.053



What Must Go to the Board?

- **Determination of construction services project delivery method (if other than Competitive Sealed 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

Case law has clarified that a “public work contract includes both traditional construction and contracts for repair of a building.” *LA Ash, Inc. v. Tex. A&M Univ.*, 2008 Tex. App. LEXIS 8206, 2008 WL 4742135 (Tex. App. Waco Oct. 29, 2008); see also *Acratod Co. v. Housing Auth. Of Houston*, 1999 Tex. App. LEXIS 889, 1999 WL 82450 (Tex. App. Houston 1st Dist. Feb. 11, 1999).



JOC / IDIQ – Bidding VS. Quoting

- **BID or PROPOSAL**

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

- **QUOTE**

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



JOC / IDIQ – Final Thoughts

- 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?](#)



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!

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

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



SUPPLY CATALOG ORDERING

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





DUE DILIGENCE / PARTNERSHIP

Facilities Sources

Print Info.

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

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: Facilities Sources



Contract Partner Web Site:

<http://www.facilitiesources.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.

Search :

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

*Select Contract Category :

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

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

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

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

PRODUCT SERVICE INFORMATION

*NAME *EMAIL

*ORGANIZATION NAME *ORGANIZATION TYPE

*PHONE EXT#

*PRODUCT/SERVICE NEED BY DATE

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



EVENTS

- About Choice Partners
- All-in-One Cooperative
- Procurement Process
- Member Reviews
- FAQs
- Current News
- COVID-19
- Vendor Spotlight
- Events
- Presentations
- Contact Us

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

About Choice Partners

All-in-One Cooperative

Procurement Process

Member Reviews

FAQs

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COVID-19

Vendor Spotlight

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Frequently Asked Questions

Q : 0. What is Harris County Department of Education?

A : Harris County Department of Education is a governmental entity. Created in 1889, HCDE provides educational services for school districts and learners of all ages. It is located in Harris County but is not part of the governmental entity of Harris County, Texas. See attorney letter [here](#). [See the benefits for membership to learn more.](#)

Q : 1. What is Choice Partners?

A : Choice Partners was created by the merger of three Harris County Department of Education procurement cooperatives, Choice Facility Partners, Gulf Coast Food Co-op and HCDE Purchasing Cooperative. Choice Partners is a national cooperative purchasing service with legally procured contracts. Using these contracts streamlines purchasing, saving time and money for governmental organizations and nonprofits. A division of [Harris County Department of Education](#), organizations in Texas that want to use these competitively bid and legally awarded contracts, sign an interlocal, government-to-government contract. Organizations outside Texas may just sign up and follow their state procurement laws.

Q : 2. Who is eligible to use Choice Partners?

A : Schools, colleges, universities, municipalities, counties, state agencies and other governmental entities, and nonprofits may join and use Choice Partners contracts. Private schools and higher education organizations that operate as nonprofit organizations may also become members.



VENDOR CONTACT INFORMATION

Balfour Company

Print Info.

Contract Category: 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@choicepartners.org

713-681-6052

Contract Partner: Balfour Company



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.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

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Contact Us

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Kristi Nichols, RTSBA	Contract Manager	713-696-1337
Michael Robles, RTSBA	Contract Manager	713-316-4254
Monique Joseph	Contract Manager	713-316-4259
Steve Gibson	Contract Manager	713-681-6052
Laura Sprehe	Contract Manager/Food	713-696-8213
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
Arlita Kyles, CTSBO	Contract Specialist	713-696-8241
Yvonne Johnson	General Office Clerk II	713-696-1886
Kay Vorish, CTSBO	Contract Assistant	713-696-0743
Shandra Powell	Clerk - General Office	713-696-1389
Fred Calhoun	Field Representative	713-203-5365
Ann Marie Harbour	Field Representative	817-703-7901
Jeff Drury	Director	713-696-0786

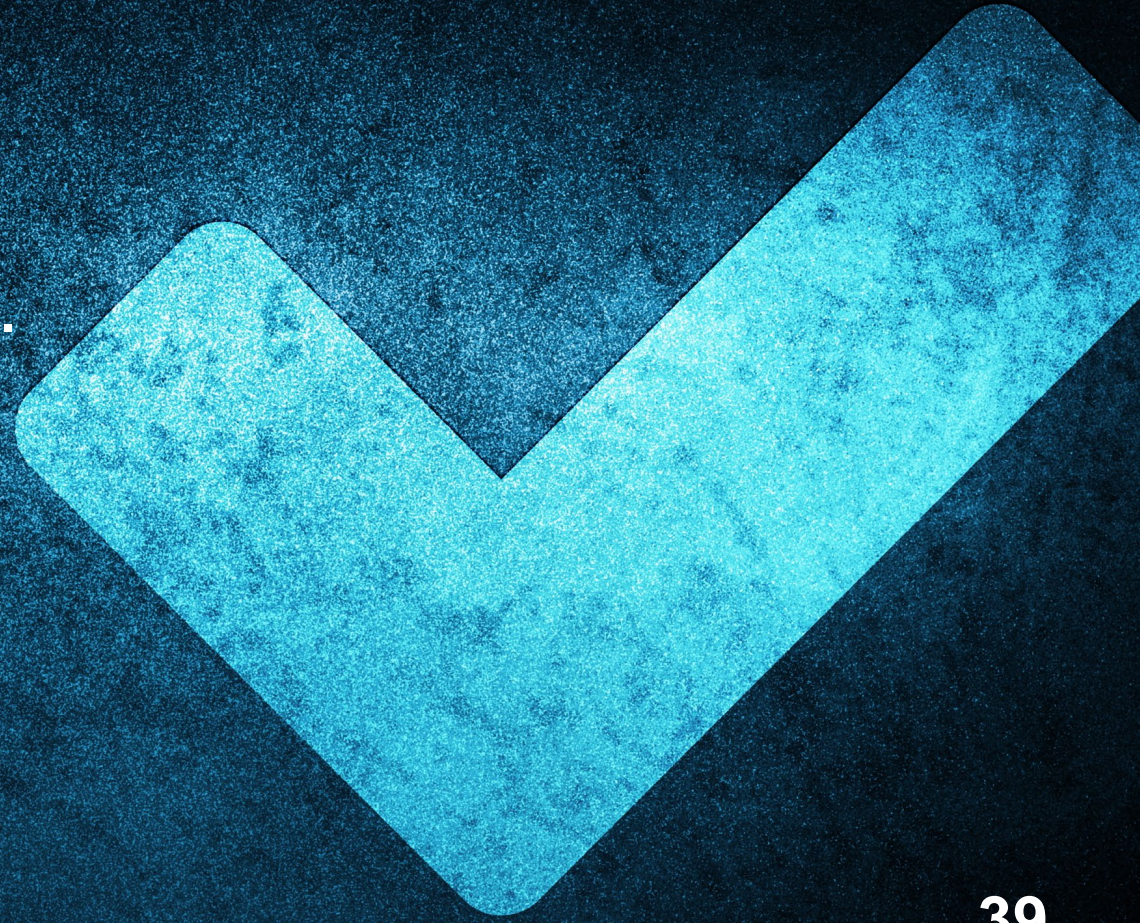


Survey

Members:

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

SURVEY





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

www.linkedin.com/company/choice-partners

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



Contacts

CP Management

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Michael: michael@choicepartners.org
Monique: monique@choicepartners.org
Steve: steve@choicepartners.org

Contract Compliance

Mary: mary@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