The Right Resources. Right Now.
MEMBER WORKSHOP AGENDA
November 3, 2022

9:30 a.m. to 9:45 a.m.
Welcome and Introduction

9:45 a.m. to 10:15 a.m.
Choice Partners Cooperative
Legal Requirements

10:15 to 11:00 a.m.
Navigating the Website

11:00 a.m. to 11:30 a.m.
Vendor Intro and Break

11:30 a.m. to 12:15 p.m.
Job Order Contracting

12:15 p.m. to 12:45 p.m.
Lunch and Vendor Visits

12:45 p.m. to 1:00 p.m.
Door prizes awarded and evaluations

1:00 p.m.
Closing
WIN, WIN, WIN
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
LEGAL REQUIREMENTS
Question 1

What are some reasons to use Choice Partners cooperative contracts?
Reasons to use Choice Partners!

- Saves staff time in purchasing - Contracts are already competitively procured
- Saves staff time in construction, purchasing and food services
- Saves on budgets while saving taxpayer dollars
- Improves procurement initiatives and efficiency
- Extends staff time through use of these contracts
**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 |

**Legal Requirements - Texas**

1. Government Code 2269 Construction Procurement for all government (except Higher Ed.)
2. Local Gov’t Code 252/262 Purchasing & Contracting Authority of Municipalities, Counties, other Government
3. 24 CFR 85.36 Housing and Urban Development
4. EDGAR/Uniform Guidance (2 CFR 200)
5. HB 1295
6. TEC 51.9335 Higher Education
**Facilities Sources**

**Contract Category:** Construction-JOC (JOC-IDIQ)  
**Contract Number:** 21/038MR-05  
**Contract Terms:**  
Initial Award Date: July 21, 2021  
Current Expiration Date: July 20, 2022  
Renewal Options Remaining: 3  
**CP Contract Manager:** Michael Robles  
email: mrobles@hcde-texas.org  
phone: 713-316-4254  

**Contract Partner:** Facilities Sources  
**Contract Partner Web Site:** http://www.facilitiessources.com  
**Approved Market Area:** TX  
**Texas Regional Centers:**  
Region 4  
Primary  
Regions 3 and 5 Secondary

**APPROVED PRODUCT OR SERVICE:**  
JOC-IDIQ Construction

**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:** Yes  
**MWBE Status:** Yes  
**SBE Status:** No  
**DUE Diligence:** [Download]
# DUE DILIGENCE ZIP FILE

## DUE DILIGENCE OUTLINE

<table>
<thead>
<tr>
<th>#</th>
<th>Document Name</th>
<th>Description</th>
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<tbody>
<tr>
<td>01</td>
<td>XX-XXXXX Independent Estimate (IED)</td>
<td>IED to generate Ad &amp; Affidavit</td>
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<tr>
<td>02</td>
<td>XX-XXXXX Advertisements &amp; Affidavits</td>
<td>Ad and Affidavit rollout RFP</td>
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<td>03</td>
<td>XX-XXXXX RFP/CSP Document</td>
<td>RFP Posted on eBid</td>
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<td>04</td>
<td>XX-XXXXX RFP/CSP Addenda (if any)</td>
<td>RFP Addenda Posted on eBid</td>
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<td>05</td>
<td>XX-XXXXX Evaluation Summary</td>
<td>Committee Evaluates to Award</td>
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<tr>
<td>06</td>
<td>XX-XXXXX Proposal (Bid)Tabulation</td>
<td>Document Generated from Evaluation</td>
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<tr>
<td>07</td>
<td>XX-XXXXX Participation Listing</td>
<td>Back-up Doc of respondent history</td>
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<td>08</td>
<td>XX-XXXXX Vendor Response (Attributes)</td>
<td>Part of Proposal/CSP Response</td>
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<tr>
<td>09</td>
<td>XX-XXXXX EDGAR Certification</td>
<td>Required Document for Proposal</td>
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<td>10</td>
<td>XX-XXXXX Cost Price Analysis (CPA)</td>
<td>Generated by Eval and Bid Tab</td>
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<td>11</td>
<td>XX-XXXXX Current Pricing</td>
<td>Listed with CPA</td>
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<td>12</td>
<td>XX-XXXXX TEC Form 1295 (ACK)</td>
<td>Required for Board Approval</td>
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<tr>
<td>13</td>
<td>XX-XXXXX SAM Reports</td>
<td>Proof Entity/Officers not debarred by GSA</td>
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<td>14</td>
<td>XX-XXXXX Board Approval (Proof)</td>
<td>Award Approved</td>
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<td>15</td>
<td>XX-XXXXX Contract Award Letter</td>
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<td>16</td>
<td>XX-XXXXX Contract</td>
<td>Exec of Offer and Ts and Cs</td>
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<td>17</td>
<td>XX-XXXXX Contract Assignment</td>
<td>Name or other changes (buyouts/mergers, etc.)</td>
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<td>18</td>
<td>XX-XXXXX Renewal Letter #1</td>
<td>R1 Signed Document</td>
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<td>19</td>
<td>XX-XXXXX Renewal Letter #2</td>
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<tr>
<td>20</td>
<td>XX-XXXXX Renewal Letter #3</td>
<td>R3 Signed Document</td>
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</tbody>
</table>
Who do I contact at CP if I would like someone to review a quote that I received from an awarded CP vendor?
Question 2 - Answer

Mary Causey
Contract Compliance Specialist
Mary@choicepartners.org

Kristi Nichols
Contract Manager
Kristi@choicepartners.org

Michael Robles
Contract Manager
Michael@choicepartners.org

Monique Joseph-Francis
Contract Manager
Monique@choicepartners.org

Steve Gibson
Contract Manager
Steve@choicepartners.org
FOOD / CAFETERIA CONTRACTS

• 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
New Contracts for SY 22-23
- Commercial Food Distributor
- Chemical Products for Foodservice
- Direct Delivery of Snacks and Beverages
- Restaurant Branded Food Delivery
- Technology Products for Foodservice
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 Prestigliacomo, at 713-696-0742. Our goal is to support you in finding the right resources for your child nutrition or cafeteria program.

Trisha Prestigliacomo,
RTSEBA:
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?
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 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 877-696-2122 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 or excel of current contracts

Supply Catalog
View our online supply catalog for cooperative contracts by category and for vendor

Order Portal
Add your Purchase Orders Here

RECENT ACTIVITY

2022 September Press Release
September 28, 2022

2022 August Press Release
August 23, 2022

EVENTS

Operations and Facility Masters Conference
October 27, 2022

Member workshop Region 1
November 3, 2022

TxPPA Annual Conference
November 16, 2022
DUE DILIGENCE/PARTNERSHIP

**Atlas Universal**

- **Contract Category:** Waterproofing/Masonry
- **Contract Number:** 22/O22M-02
- **Contract Terms:**
  - Initial Award Date: April 20, 2022
  - Current Expiration Date: April 19, 2023
  - Renewal Options Remaining: 3
- **CP Contract Manager:**
  - Monique Francis
  - monique@choicepartners.org
  - 713-316-4269
- **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 Manville, 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.

**CONTACT INFO**

For SALES

**Miranda Zenteno**

735 W. Tidwell Rd.
Houston, Texas 77091

**Phone:** 713-695-1626

**Fax:** 713-695-1654

[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  
Member Name: Harris County Department of Education  
Email: andrey.cuellar@hcoe-texas.org  
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

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

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<tr>
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<td>[ ]</td>
<td>Choose File</td>
<td>No file chosen</td>
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</tbody>
</table>

*ADD MORE*  *SAVE NOW*

**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.
• 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

TxPPA Annual Conference (November 15, 2022)

TxPPA Annual Conference
( November 15 - 18, 2022 )

Fall 2022 Conference Delegate Registration

Embassy Suites San Marcos | San Marcos, Texas
November 15 – 18, 2022

Plan to join the Texas Public Purchasing Association for its Fall 2022 Conference & Annual Business Meeting. This powerful conference will include timely content and a dynamic expo. Be sure to register today!

Note Delegate Registrations include the Pre-Conference Session. Registration for just the Pre-Conference session is also available.

Delegate Registration is only available for those involved in public purchasing. Registration is not available for exhibitors and sponsors. For participants staying at the Embassy Suites San Marcos, breakfast is included with the hotel stay.
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.
# STAFF CONTACT INFORMATION

<table>
<thead>
<tr>
<th>Name</th>
<th>Title/Position</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joann Nichols, RTCS</td>
<td>Assistant Director/Construction &amp; Commodities</td>
<td>713-696-2122</td>
</tr>
<tr>
<td>Trisha Pirotta, RTCS</td>
<td>Assistant Director/Food</td>
<td>713-696-0742</td>
</tr>
<tr>
<td>Stephen Kendrick, RTCS</td>
<td>Sr. Mgr. Facility Planning</td>
<td>713-696-8252</td>
</tr>
<tr>
<td>Kristi Nichols, RTCS</td>
<td>Contract Manager</td>
<td>713-696-1337</td>
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<tr>
<td>Michael Robles, RTCS</td>
<td>Contract Manager</td>
<td>713-316-4254</td>
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<tr>
<td>Monique Joseph-Francis, CTCS</td>
<td>Contract Manager</td>
<td>713-316-6259</td>
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<tr>
<td>Steve Gibson, CPSM</td>
<td>Contract Manager</td>
<td>713-681-8052</td>
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<tr>
<td>vacant</td>
<td>Contract Coordinator</td>
<td>713-696-8208</td>
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<tr>
<td>Laura Sprehn, RD, LD, MPH, RTCS</td>
<td>Contract Manager/Food</td>
<td>713-696-8213</td>
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<tr>
<td>Janet Wachs</td>
<td>MCE Asst. Director</td>
<td>920-351-1097</td>
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<tr>
<td>Jane Lopez</td>
<td>Client Services Manager</td>
<td>713-696-0746</td>
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<tr>
<td>Mary Caussey, MS, RTCS</td>
<td>Contract Compliance Specialist</td>
<td>713-696-8270</td>
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<tr>
<td>Arline Styles, CTCS</td>
<td>Contract Specialist</td>
<td>713-696-8241</td>
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<tr>
<td>Vonne Johnson, CTCS</td>
<td>General Office Clerk II</td>
<td>715-696-1886</td>
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<tr>
<td>Kay Verhulst, CTCS</td>
<td>Contract Assistant</td>
<td>FMLA</td>
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<tr>
<td>Shandra Powell</td>
<td>Clerk - General Office</td>
<td>713-696-1389</td>
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<tr>
<td>Roland Salazar</td>
<td>Clerk - General Office</td>
<td>715-696-1787</td>
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<tr>
<td>Ann Marie Harbour</td>
<td>Field Representative</td>
<td>817-703-7901</td>
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<tr>
<td>Louise Hooper</td>
<td>Field Representative</td>
<td>713-305-1447</td>
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<tr>
<td>Charlie “Les” Hooper</td>
<td>Field Representative</td>
<td>281-802-5693</td>
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<tr>
<td>Jeff Drury, RTCS</td>
<td>Sr. Director</td>
<td>713-696-0786</td>
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CHOICE PARTNERS
COOPERATIVE

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.
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)**
Maintenance VS. Construction

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
<table>
<thead>
<tr>
<th>Vendor Name</th>
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<th>Choice Partners Contract #18/036MC-XX</th>
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**Data Release**  
Year 2019 Quarter 2

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<th>Unit</th>
<th>Total O&amp;P</th>
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<td>Central station air handler, up thru 15 ton, selective demolition</td>
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<td>$5,792.50</td>
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<td>Year 2019 Quarter 2 (Use most updated available at time quote is requested)</td>
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<td>Rooftop air conditioner, single zone, electric cool, gas heat, 3 ton cooling, 60 MBH heating, includes, standard controls, curb and economizer</td>
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<td>$4,265.00</td>
<td>RR</td>
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<td>TEXAS / HOUSTON (770-772)</td>
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<td>3</td>
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<td>TEXAS / HOUSTON (770-772)</td>
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<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>
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<td>1</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>$13,614.90</td>
<td>RR</td>
<td>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
<td></td>
</tr>
<tr>
<td>2</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>RR</td>
<td>Year 2019 Quarter 2</td>
<td>TEXAS / HOUSTON (770-772)</td>
<td></td>
</tr>
<tr>
<td>100</td>
<td>239110106050</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>$9,470.00</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>$9,888.76</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**  
$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**  
$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
WIN, WIN, WIN

Diagram showing the relationship between Choice Partners, CP Member, and CP Awarded Vendor. The diagram illustrates how these entities are connected through Interlocal Agreement, Awarded Contract, P.O., Job Order and/or Contracted Services Agreement.
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
JOC / IDIQ – The JOB Order

- 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
  
  *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
  
  *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 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.
The JOC Process - Texas

1. **Project Identification**
   - Choose Delivery Method and receive Board Approval if necessary (Master JOC Contract)
   - Require A/E? (Refer to TBPE & TBAE flowcharts)

2. **Joint Site Visit with Contractor(s) & Joint Scope (include Prevailing Wages)**
3. **Contractor(s) prepare Estimate/Proposal using UPB**
4. **Owner Reviews Proposal(s)**
5. **Owner/Contractor Negotiate Proposal, VE, Schedule, etc**
6. **Finalize Proposal**
7. **Send to CP for compliance review**
8. **Owner Issues Written Job Order with Prevailing Wages, obtain any applicable bonds & board approval if required**
9. **JOC/Project Delivery**
10. **Project closeout, Owner sign-off**
• 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
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

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