



**The Right
Resources.
Right Now.**



MEET THE CP STAFF





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.

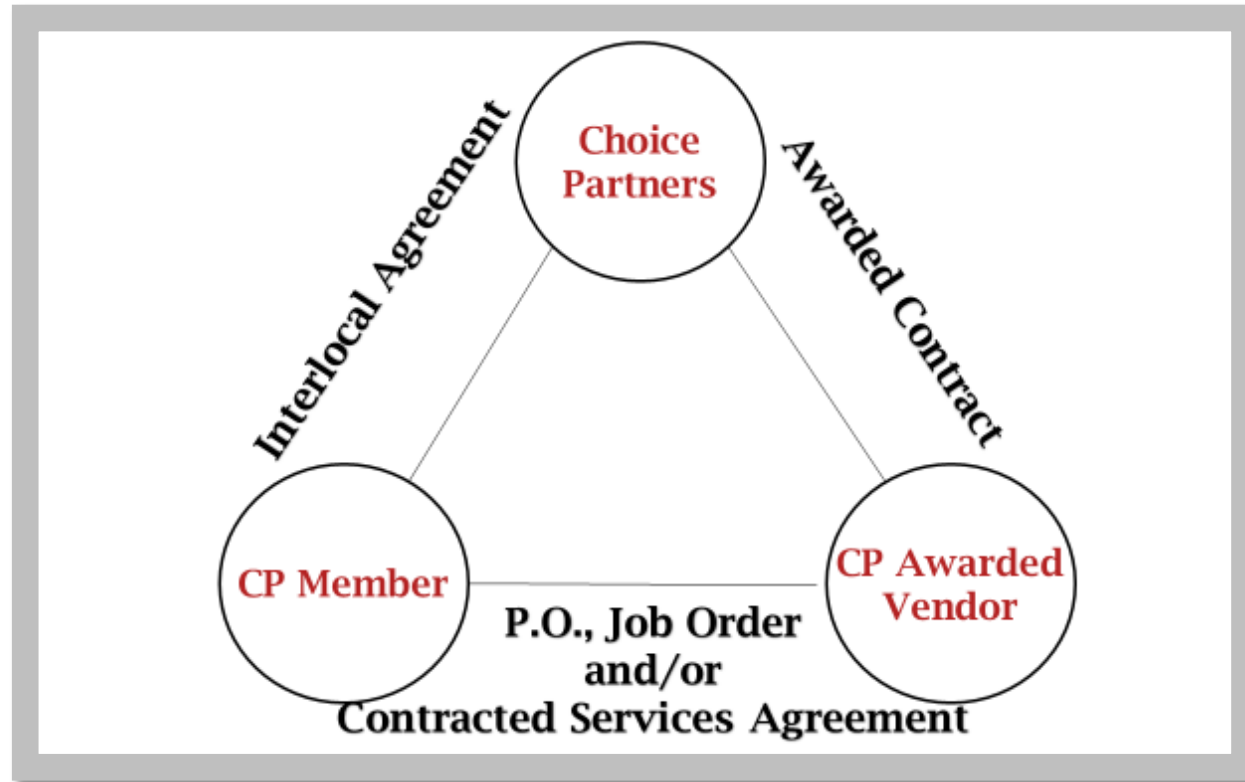
Door prizes awarded and evaluations

1:00 p.m.

Closing



WIN, WIN, WIN





HCDE, 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

| <p>STUDENTS AND EDUCATORS SERVED</p> <p>GRADUATE DEDICATED PURPOSEFUL CATALYST PERSISTENT</p> | <p>IMPACT ENGAGE DISCOVER ACHIEVE</p> | <p>SUCCESS EDUCATION PREPARE NUTRITION HEALTH</p> | <p>STUDENT ACADEMIC ACHIEVER SCHOLAR OPPORTUNIST LEARNER</p> | <p>TREATMENT HELPFUL BENEFIT UNDERSTANDING PATIENCE INSPIRE ANALYSIS</p> |
|--|--|--|--|--|
| <p>ADULT EDUCATION 9,121</p> | <p>CASE FOR KIDS 17,411</p> | <p>HEAD START 3,409</p> | <p>SPECIAL SCHOOLS 729</p> | <p>THERAPY SERVICES 13,898</p> |
| <p> CENTER FOR SAFE AND SECURE SCHOOLS 51,655 Students and Educators</p> | <p> CHOICE PARTNERS \$28 Million in Support for Districts</p> | <p> EDUCATOR CERTIFICATION 1,489 Educators Served</p> | <p> RECORDS MANAGEMENT 42 Government Agencies</p> | <p> TEACHING AND LEARNING CENTER 9,200 Educators Served</p> |





LEGAL REQUIREMENTS





Question 1

What are some reasons to use Choice Partners cooperative contracts?



Question 1 - Answer

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



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



DUE DILIGENCE

Print Info.

Facilities Sources

Contract Category: Construction-JOC (JOC-IDIQ)

Contract Number: 21/039MR-05

Contract Terms:

Initial Award Date: July 21, 2021

Current Expiration Date: July 20, 2022

Renewal Options Remaining: 3

CP Contract Manager:

Michael Robles
mrobles@hcde-texas.org
713-316-4254

Contract Partner: Facilities Sources



Contract Partner Web Site:
<http://www.facilitysources.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 | | | Document Flow |
|-----------------------|----------|------------------------------|---|
| 01 | XX-XXXXX | Independent Estimate (IED) | IED to generate Ad & Affidavit |
| 02 | XX-XXXXX | Advertisements & Affidavits | Ad and Affidavit rollout RFP |
| 03 | XX-XXXXX | RFP/CSP Document | RFP Posted on eBid |
| 04 | XX-XXXXX | RFP/CSP Addenda (if any) | RFP Addenda Posted on eBid |
| 05 | XX-XXXXX | Evaluation Summary | Committee Evaluates to Award |
| 06 | XX-XXXXX | Proposal (Bid) Tabulation | Document Generated from Evaluation |
| 07 | XX-XXXXX | Participation Listing | Back-up Doc of respondent history |
| 08 | XX-XXXXX | Vendor Response (Attributes) | Part of Proposal/CSP Response |
| 09 | XX-XXXXX | EDGAR Certification | Required Document for Proposal |
| 10 | XX-XXXXX | Cost Price Analysis (CPA) | Generated by Eval and Bid Tab |
| 11 | XX-XXXXX | Current Pricing | Listed with CPA |
| 12 | XX-XXXXX | TEC Form 1295 (ACK) | Required for Board Approval |
| 13 | XX-XXXXX | SAM Reports | Proof Entity/Officers not debarred by GSA |
| 14 | XX-XXXXX | Board Approval (Proof) | Award Approved |
| 15 | XX-XXXXX | Contract Award Letter | Board Approval Notice |
| 16 | XX-XXXXX | Contract | Exec of Offer and Ts and Cs |
| 17 | XX-XXXXX | Contract Assignment | Name or other changes (buyouts/mergers, etc.) |
| 18 | XX-XXXXX | Renewal Letter #1 | R1 Signed Document |
| 19 | XX-XXXXX | Renewal Letter #2 | R2 Signed Document |
| 20 | XX-XXXXX | Renewal Letter #3 | R3 Signed Document |



Question 2

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

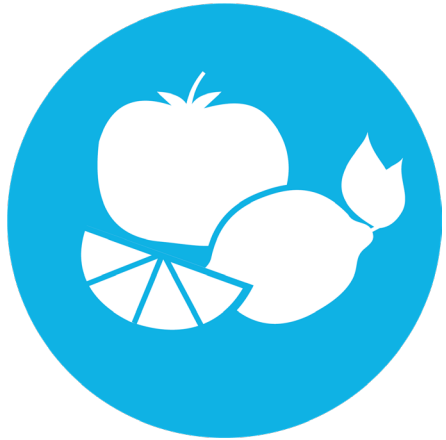
Michael Robles
Contract Manager
Michael@choicepartners.org

Monique Joseph-Francis
Contract Manager
Monique@choicepartners.org

Steve Gibson
Contract Manager
Steve@choicepartners.org



CONTRACTS



FOOD/CAFETERIA

TECHNOLOGY

COMMODITIES

SERVICES

FACILITIES



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





FOOD/CAFETERIA CONTRACTS

- ❖ 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



FOOD 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?](#)



FOOD MEMBER DASHBOARD

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 Prestigiaco, at 713-696-0742. Our goal is to support you in finding the right resources for your child nutrition or cafeteria program.

Current Vendors

Search vendors by name, category, contract number or state

Commodity Processing

View/download product information and nutrition facts

Pricing

View/download pricing sheets by categories and contract

In-Active Contracts Due Diligence

Download required documents needed for auditing

Resources

Find commonly used information needed by nutrition directors

Child Nutrition Labels

View/download labels by vendor

Procurement/Annual Review

View/download procurement documents

Buy American Provision

View/download American Provision

CONTACT INFO



Trisha Prestigiaco,
RTSBA:
Choice Partners Assistant
Director
Food Contracts
Phone: 713-696-0742
trisha@ChoicePartners.org



Laura Sprehe - RD LD MPH:
Contract Manager
Phone: 713-696-8213
Laura@ChoicePartners.org



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 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 complete 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

Food



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 15, 2022



DUE DILIGENCE/PARTNERSHIP

Atlas Universal

Print Info.

Contract Category:

Waterproofing/Masonry

Contract Number: 22/022MJ-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

713-316-4259

Contract Partner: Atlas Universal



Contract Partner Web Site:

<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 Mansville, 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.co](mailto:Miranda@atlasuniversal.com)

[m](#)



ORDER PORTAL

Add Purchase Order

MANAGE 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

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

Add Purchase Order

MANAGE 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:

Contract:

| Bill Date | PO Number | PO File | PO Order Total |
|---|----------------------|---|----------------------|
| <input type="text" value="(MM/DD/YYYY)"/> | <input type="text"/> | <input type="button" value="Choose File"/> No file chosen | <input type="text"/> |
| <input type="text" value="(MM/DD/YYYY)"/> | <input type="text"/> | <input type="button" value="Choose File"/> No file chosen | <input type="text"/> |
| <input type="text" value="(MM/DD/YYYY)"/> | <input type="text"/> | <input type="button" value="Choose File"/> No file chosen | <input type="text"/> |
| <input type="text" value="(MM/DD/YYYY)"/> | <input type="text"/> | <input type="button" value="Choose File"/> No file chosen | <input type="text"/> |
| <input type="text" value="(MM/DD/YYYY)"/> | <input type="text"/> | <input type="button" value="Choose File"/> No file chosen | <input type="text"/> |

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

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](#)



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.

The screenshot shows a web form for requesting a quote. At the top right is a search bar. Below it is a navigation menu with letters A-Z. The main section is titled "*Select Contract Category:" and contains a grid of checkboxes for various services such as "Data Network Cabling", "Debris Removal Service", "Digital Signage For Food Service", "Direct Delivery Of Snacks And Beverages", "Disaster Mitigation With Restoration (JOC-IDIQ)", "Disaster Recovery Consultants", "Document Management", "Doors, Windows, And Hardware (JOC-IDIQ)", and "Drug Testing Services". Below this is a section for "*SELECT VENDOR(S) : (VENDORS ARE REQUESTED TO RESPOND WITHIN 48 HOURS)" with a "Select All | Unselect All" link. It lists several vendors with checkboxes, including Blackmon Mooring/BMS CAT, ERC Environmental & Construction Services, Enterprise Builders LLC, Gerloff Company, Inc, Horizon International Group, and Texas General Contractors, Inc. LLC. The "PRODUCT SERVICE INFORMATION" section has a large text area. Below that are input fields for *NAME, *EMAIL, *ORGANIZATION NAME (pre-filled with "Harris County Department of Education"), *ORGANIZATION TYPE (dropdown menu with "School District" selected), *PHONE (with separate boxes for area code, number, and extension), and *PRODUCT/SERVICE NEED BY DATE (with a calendar icon). There is also an "ATTACH FILE (MAX FILE SIZE 10 MB)" section with a "Choose File" button and "No file chosen" text. A red "SUBMIT NOW" button is at the bottom right.



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

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

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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

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Contact Us

| | | |
|--|---|--------------|
| Joann Nichols, RTSBA | Assistant Director/Construction & Commodities | 877-696-2122 |
| Trisha Prestigiacombo, 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 |
| Monique Joseph-Francis, CTSBO | Contract Manager | 713-316-4259 |
| Steve Gibson, CPSM | Contract Manager | 713-681-6052 |
| vacant | Contract Coordinator | 713-696-8208 |
| Laura Sprehe, RD, LD, MPH, RTSBA | Contract Manager/Food | 713-696-8213 |

| | | |
|--|--------------------------------|--------------|
| vacant | Contract Assistant/Food | 713-696-8243 |
| Janet Wachs | MCE Asst. Director | 920-251-1097 |
| Jane Lopez | Client Services Manager | 713-696-0746 |
| Mary Causey, MS, RTSBA | Contract Compliance Specialist | 713-696-8270 |
| Arlita Kyles, CTSBO | Contract Specialist | 713-696-8241 |
| Yvonne Johnson, CTSBO | General Office Clerk II | 713-696-1886 |
| Kay Vorish, CTSBO | Contract Assistant | FMLA |
| Shandra Powell | Clerk - General Office | 713-696-1389 |
| Roland Salazar | Clerk - General Office | 713-696-1787 |
| Ann Marie Harbour | Field Representative | 817-703-7901 |
| Louise Hooper | Field Representative | 713-305-1447 |
| Charlie "Les" Hooper | Field Representative | 281-802-5693 |
| Jeff Drury, RTSBA | Sr. Director | 713-696-0786 |



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.

Standard
Opera
Procedu



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

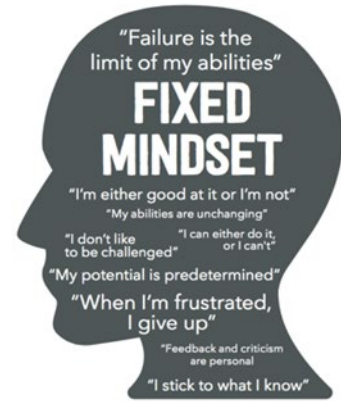


JOC/IDIQ – Why Job Order Contracting (JOC)

• ~~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



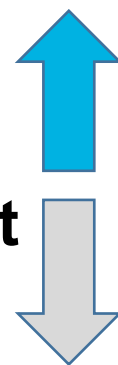
JOC/IDIQ – Maintenance VS. Construction

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)



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



JOC/IDIQ Estimate

| HVAC Example | | | | | | | | | |
|---------------------------------------|--------------|--|------|--------------|----------------|------------|---|---------------------------|--|
| Vendor Name | | | | | | | | | |
| Job Description | | | | | | | | | |
| Choice Partners Contract #18/036MC-XX | | | | | | | | | |
| Data Release : Year 2019 Quarter 2 | | | | | | | | | |
| Quantity | LineNumber | Description | Unit | O&P | Ext. Total O&P | Labor Type | Data Release | CCI Location | Notes |
| 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 | | 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 | | | | |

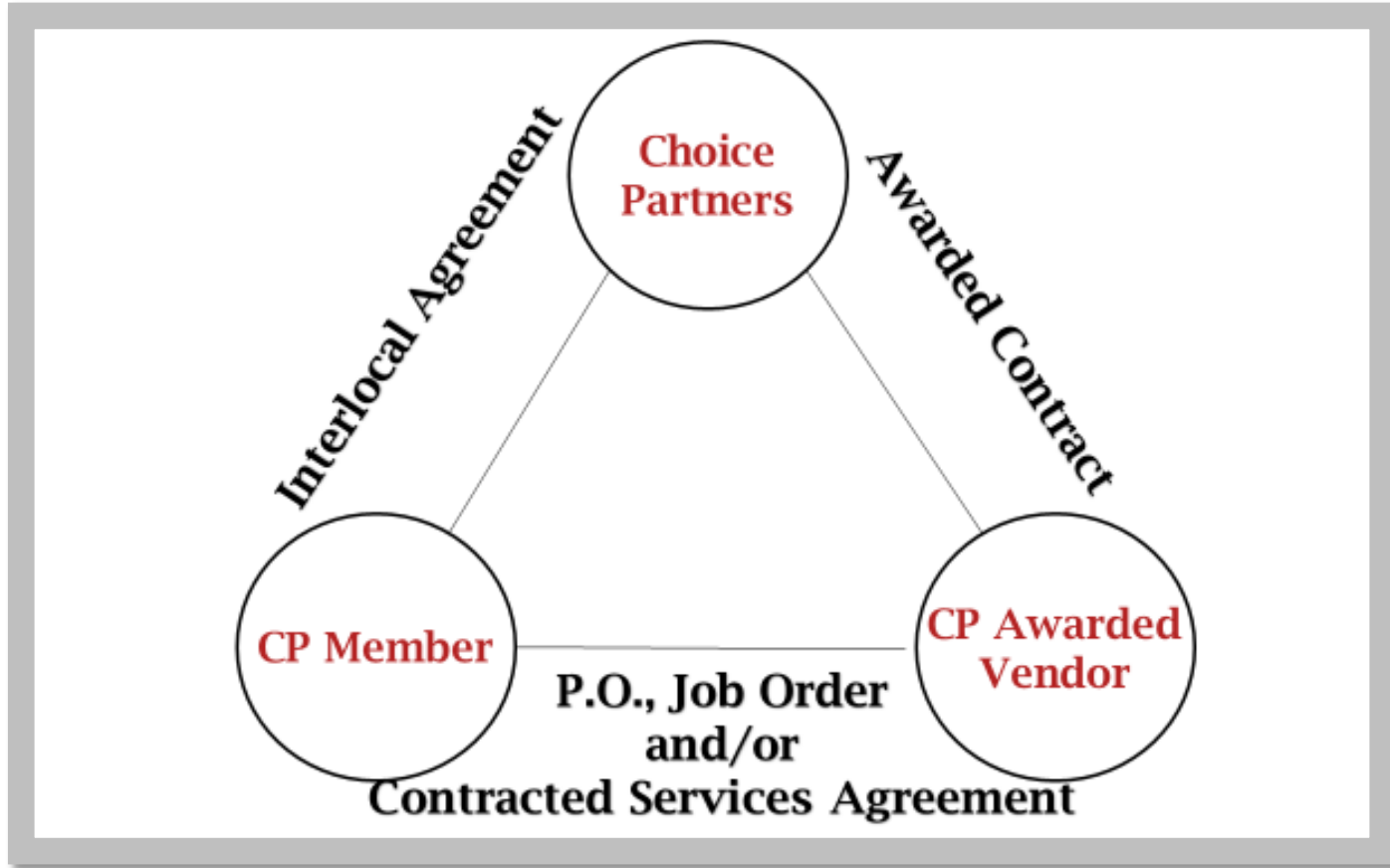


Review the JOC Quote

- 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



WIN, WIN, WIN





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.”



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. 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 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

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**

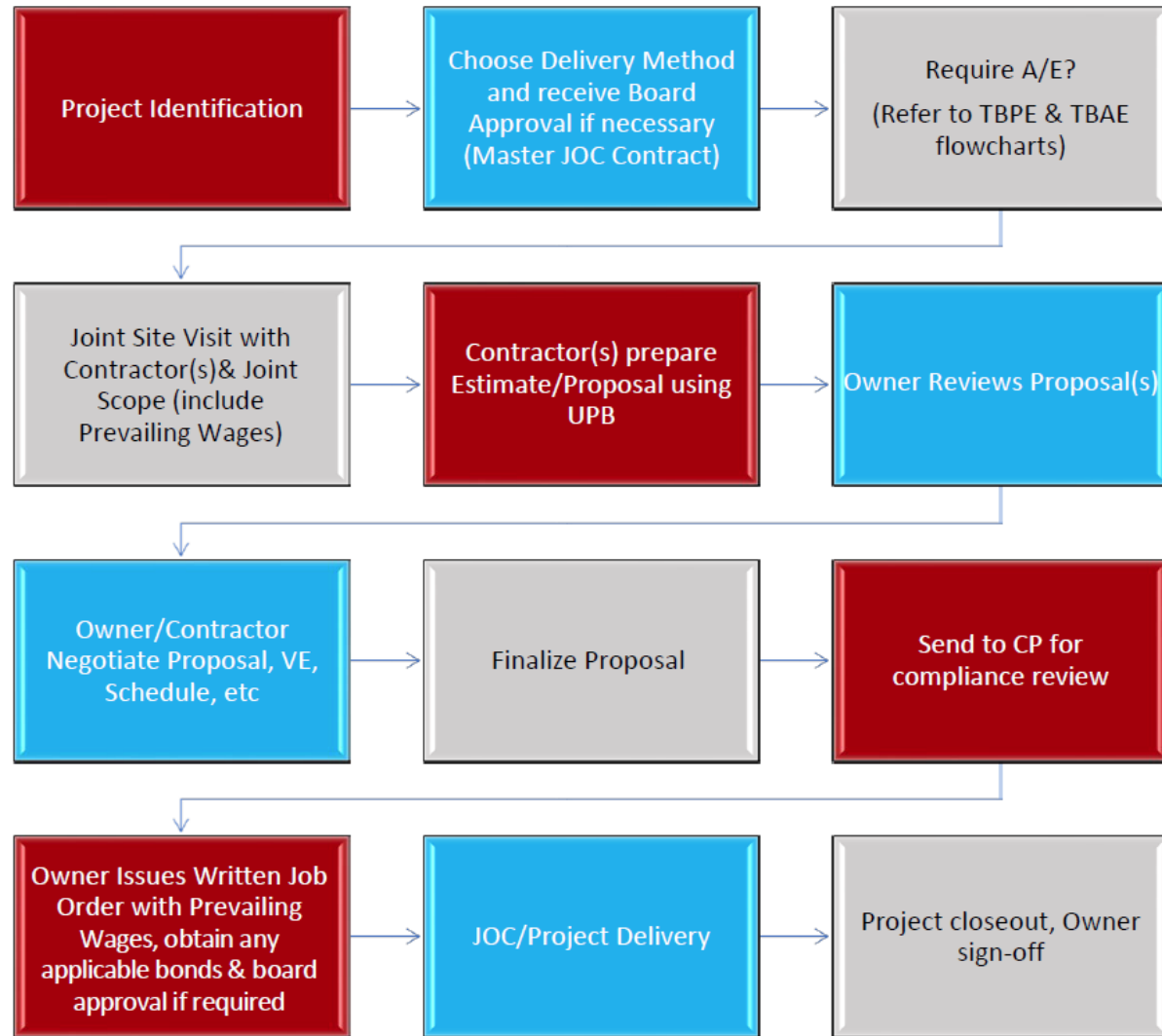
vendor's ***formal, written, sealed response*** that satisfies the state's procurement requirements for a governmental entity.

- **QUOTE**

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



The JOC Process - Texas





JOC / IDIQ – Final Thoughts

- 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



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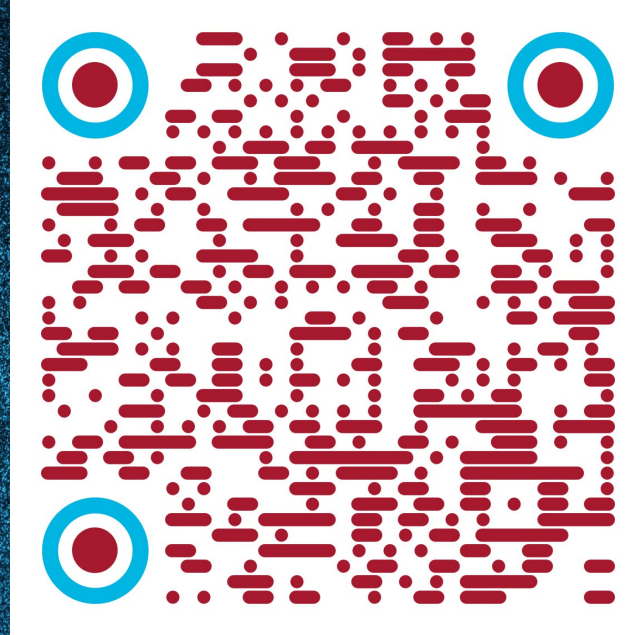
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Survey

Members:

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



SURVEY



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