



**The Right  
Resources.  
Right Now.**



# MEET THE CP STAFF





# VENDOR ORIENTATION AGENDA

**10:00 to 10:15 a.m.**

*Welcome and Introduction  
Choice Partners Cooperative  
\*CHOICE CA\$H*

**10:15 to 10:40 a.m.**

*Legal Requirements  
Food/Cafeteria Contracts*

**10:40 to 11:15 a.m.**

*Growing Your Business*

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

*Job Order Contracting*

**12:15 -12:30 p.m.**

*Closing*



# WELCOME

Contract is **b r o a d e r** than HCDE  
*School districts, charter schools, counties,  
municipalities, colleges, universities*

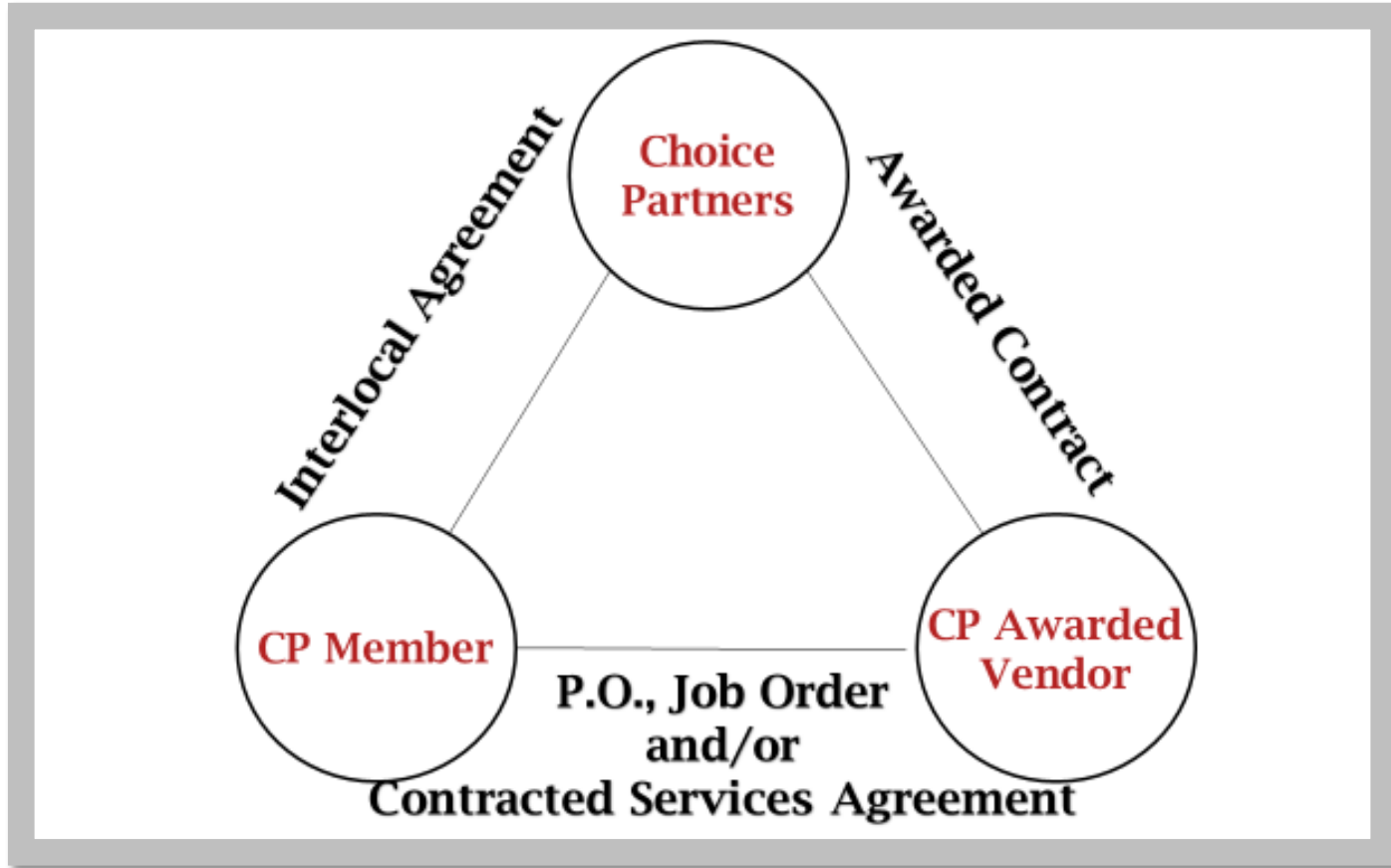
**WIN – WIN – WIN**

How can we help you?





# WIN, WIN, WIN





# HCDE, A GOVERNMENTAL ENTITY

## Harris County Department of Education

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

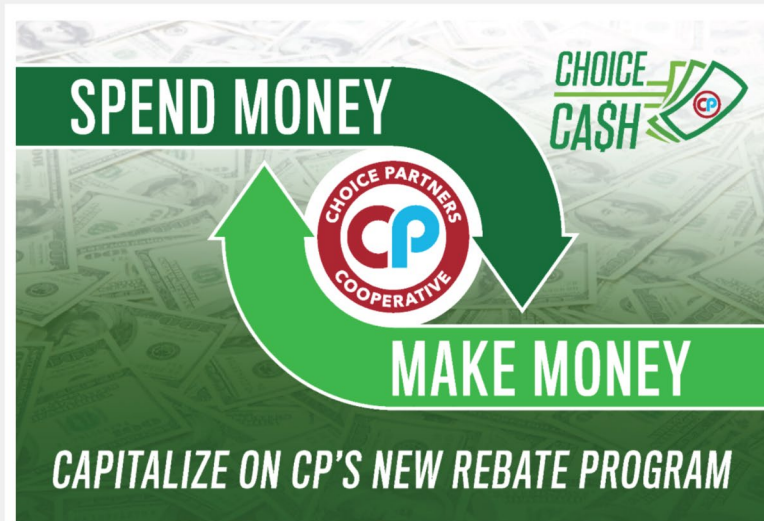
 RECORDS MANAGEMENT  
**42** Government Agencies

 TEACHING AND LEARNING CENTER  
**9,200** Educators Served



# 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](mailto: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](#)





# 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





# LEGALLY PROCURED CONTRACTS

## Benefits to Vendors

- Less risk/time per sale
- Repeat business
- Single award / potential for multiple entities
- More relationship sales, less RFPs
- Propose on needs that are never “bid out”
- **Not-to-exceed** pricing applies to **all members**
- “Pre-qualification” factor



# WHY YOUR GOV'T CUSTOMERS ARE USING COOPERATIVE PURCHASING

- Lower Prices
- Lower administrative costs
- More favorable terms and conditions

National Institute for Government Purchasing  
<https://www.nigp.org/our-profession/cooperative-purchasing-programs>



# WHY YOUR GOV'T CUSTOMERS ARE USING COOPERATIVE PURCHASING

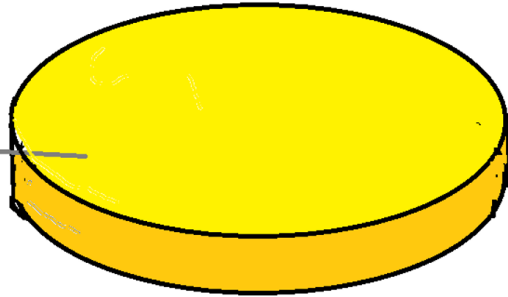
- Cooperative Purchasing authorized by Texas Gov't Code 791, LGC 271, TEC 44.031(a)
- Get the project or purchase started immediately
- Established pricing
- Flexibility and convenience
- Shift procurement resources to more complex/needed areas
- Reduce procurement cost and risk
- Work with established vendors



# Orders of Benefit

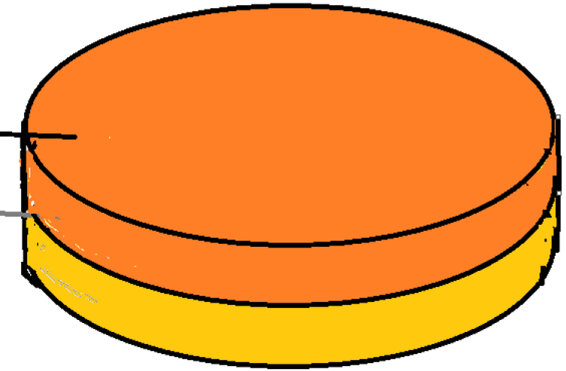
## “Layer Cake”

Help the customer



get what they want

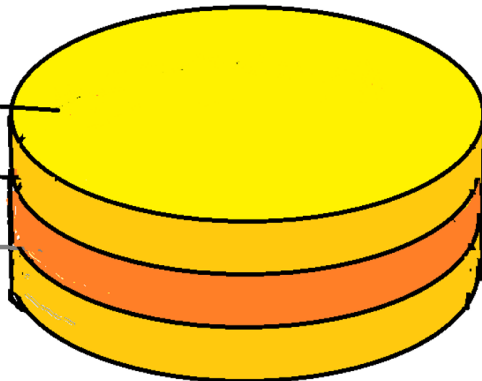
Help the customer



from you

Get what they want

Help the customer

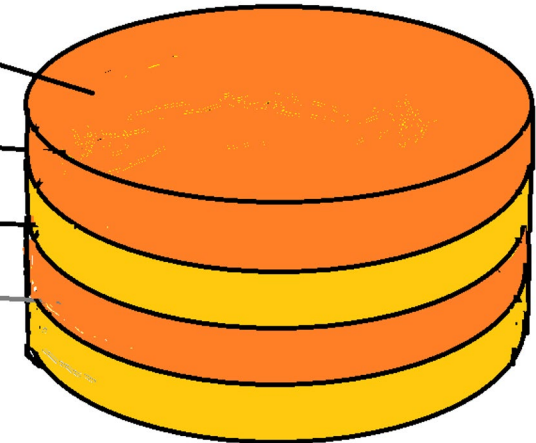


legal and compliant

From you

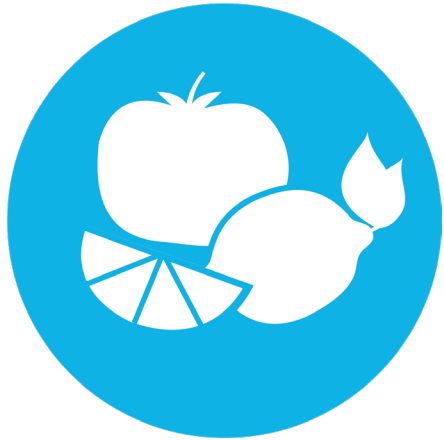
Get what they want

Help the customer





# CONTRACTS



**FOOD/CAFETERIA**

**TECHNOLOGY**

**COMMODITIES**

**SERVICES**

**FACILITIES**



# How Well Do You Know Your Choice Partners Contract?

1. It's appropriate to offer better pricing/discounts to Choice Partners members than the contracted pricing?

- A) True
- B) False (RFP) 8.1

2. Its permitted to add the CP Fee to the quotation?

- A) True (RFP) 1.2.8.
- B) False

3. Pricing may be changed at any time in the contract period?

- A) True 5.29.
- B) False

4. New Items may be added to the contract pricing/catalog?

- A) Anytime 5.36.
- B) At renewal
- C) Following approval from HCDE

5. Vendors' standard terms and conditions do not apply when using the Choice Partners contract?

- A) True
- B) False (RFP) 1.2.6; 5.5., 5.14., 5.26.

6. What does IDIQ stand for?

- A) Implied discount in quotation
- B) Indefinite delivery, indefinite quantity





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A) Implied discount in quotation  
✓ B) Indefinite delivery, indefinite quantity



# 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





# REPORTING REQUIREMENTS

- **Section 5.28:**
  - Reports detail the total dollar volume of all sales under the contract for the previous month
  - Vendor is responsible for submitting one consolidated report monthly to Choice Partners
  - Reports shall be electronically mailed and in Excel format to:
    - [supplyreporting@choicepartners.org](mailto:supplyreporting@choicepartners.org) – for **Commodities**
    - [facilityreporting@choicepartners.org](mailto:facilityreporting@choicepartners.org) – for **JOC**
    - [foodreporting@choicepartners.org](mailto:foodreporting@choicepartners.org) – for **Food**
  - Due by the fifteenth (15) day of each month



# Reporting Template - Commodities

Choice Partners Monthly Reporting Form					
When complete email to <a href="mailto:supplyreporting@choicepartners.org">supplyreporting@choicepartners.org</a>					
Vendor Name:					
Month Ending:					
Year:					
Name of Person Submitting:					
Email Address:					
Date:					
<b>Please list the correct contract number for each entity's sale</b>					
	Dollar Amount	Member Name	Date	PO Number	Contract Number
1					
2					
3					
4					
5					
6					
7					
8					
9					
T	\$0.00	TOTAL			





# Reporting Template - Food

Choice Partners Monthly Reporting Form					
When complete email to <a href="mailto:foodreporting@choicepartners.org">foodreporting@choicepartners.org</a>					
Vendor Name:					
Contract Number:					
Months:					
Year:					
Name of Person Submitting:					
Email Address:					
Date:					
<b>Please list the correct contract number for each entity's sale</b>					
	\$ Amount	Member Name	Date	PO #	Contract #
1					
2					
3					
4					
5					
6					
7					
8					
9					
<b>T</b>	<b>\$0.00</b>	<b>Total</b>			





# CHECK LIST

**AWARDED**

**PROCUREMENT**

**ADMIN FEE**

**REPORTING**

**INVOICING**



# 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





# GROWING YOUR BUSINESS



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



# VENDOR LOGIN

## Vendor Login

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

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

USERNAME

PASSWORD

LOGIN

### Helpful Links

[Set Up a New Account](#)

[Forgot your password? Click here to reset password](#), then close the popup window to login on this page again.



# VENDOR DASHBOARD

## Vendor Dashboard

Welcome Admin Admin

If you are a Choice Partners vendor with a legal, competitively bid contract awarded by the HCDE governing board, you will have access to information just for awarded contract partners. If not, you will only see the eBid tab.

**After being awarded, you may:**

- **View your contract information page, as members see it**
- **Access the list of members**
- **Login to eBid system**
- **Get Marketing Resources with seal and guidelines**
- **See Bond results**

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

### View Vendors

Search vendors by name, contract title, or contract number

### View Members

Search members by name, type, state and region

### Marketing Resources

Find marketing tips, conference/membership lists, reporting files and more

### Partners Messages

Get latest vendor news and view new members

### eBid

Go to ebid and view/respond to current bids

### RECENT ACTIVITY

[2022 October Press Release](#)

October 21, 2022

[2022 September Press Release](#)

September 28, 2022

### EVENTS

[TxPPA Annual Conference](#)

November 15, 2022

[Vendor Orientation and Rebate Rollout](#)

November 29, 2022

[Member Workshop](#)

November 30, 2022





# RESOURCES

## Marketing Resources

### Your Marketing Resource Center

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

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

### Become a Featured Vendor

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

[Dashboard](#)

[View Vendors](#)

[View Members](#)

[Marketing Resources](#)

[Partners Messages](#)

[Reporting Sales](#)

[Bond Elections](#)

[Graphics](#)

[eBid](#)

[Logout](#)





# MARKETING REQUIRED

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

***OPTIONAL: (coordinate with us)***

- Ads in statewide publications
- Targeted emails



# MARKETING RESOURCES - CP SEAL

## Marketing Resources

### Marketing Resources

#### Your Marketing Resource Center

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

#### Download Choice Partner Seal

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

[Here are the guidelines for use of the seal.](#)

[Vendor Seal](#)     [Vendor Seal no white background](#)

EPS and other various file versions of the seal are available; please contact **Janet Wachs, 713-696-1379, [jwachs@hcde-texas.org](mailto:jwachs@hcde-texas.org)** for other file formats.





# FEATURED VENDOR

## Become a Featured Vendor

- Have 3+ members (not from same entity) that have used your contract and are satisfied. They must be willing to be interviewed and quoted.
- Request a form from your contract manager to be featured and return to your contract manager.
- Be interviewed by Marketing and Client Engagement and your contract manager. MCE will interview contacts.
- Vendor to review article before release.

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



# MEMBER CONTACT LIST

## **Vendor must:**

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

## **Marketing and Client Engagement will:**

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

Ask your **contract manager** to provide you the **contact request form link** after you complete the three items at top.



# 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 Admin Admin

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!

<b>Get A Quote</b> Quickly select a category, vendors, and submit for quotes	<b>Current Vendors</b> Search vendors by name, category, contract number or state	<b>Contract List</b> Download pdf or excel of current contracts
<b>Food</b>	<b>Supply Catalog</b> View our online supply catalog for cooperative contracts by Category and for Vendor	<b>Order Portal</b> Add your Purchase Orders Here

### RECENT ACTIVITY

[2022 October Press Release](#)  
October 21, 2022

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[2022 September Press Release](#)  
September 28, 2022

### EVENTS

[TxPPA Annual Conference](#)  
November 15, 2022

[Vendor Orientation and Rebate Rollout](#)  
November 29, 2022

[Member Workshop](#)  
November 30, 2022





# VENDOR CONTACT INFORMATION

## United Rentals

Print Info.

**Contract Category:** Industrial Equipment Rent, Lease or Purchase

**Contract Number:** 18/072KC-06

**Contract Terms:**

Initial Award Date: October 17, 2018

1<sup>st</sup> Renewal Start Date: October 17, 2019

2<sup>nd</sup> Renewal Start Date: October 17, 2020

3<sup>rd</sup> Renewal Start Date: October 17, 2021

Current Expiration Date: October 16, 2022

Renewal Options Remaining: 0

**CP Contract Manager:**

Steve Gibson

[steve@choicepartners.org](mailto:steve@choicepartners.org)

713-681-6052

**Contract Partner:** United Rentals



**Contract Partner Web Site:**

<http://www.unitedrentals.com>

**Approved Market Area:** National

### CONTACT INFO

For SALES

**Daniel Cunningham**

100 First Stamford Place,

Suite 700

Stamford, Connecticut

6902

**Phone :** 877-874-4468

**Fax :** 877-735-7450

[govrents@ur.com](mailto:govrents@ur.com)

For SALES

**Government Sales &**

**Service Center**

12802 Tampa Oaks Blvd,

Suite 350

Temple Terrace, Florida

33637

**Phone :** 877-874-4468

**Fax :** 877-735-7450

[govrents@ur.com](mailto:govrents@ur.com)

For SALES

**Brad Laws**

**Cell Phone :** 504-915-6013

[jlaws@ur.com](mailto:jlaws@ur.com)



# DUE DILIGENCE / PARTNERSHIP

## Construction Masters of Houston

Print Info.

**Contract Category:** Construction-JOC (JOC-IDIQ)

**Contract Number:** 20/017MR-05

**Contract Terms:**

Initial Award Date: February 26, 2020

1<sup>st</sup> Renewal Start Date: February 26, 2021

2<sup>nd</sup> Renewal Start Date: February 26, 2022

Current Expiration Date: February 25, 2023

Renewal Options Remaining: 1

**CP Contract Manager:**

Michael Robles

[mrobles@hcde-texas.org](mailto:mrobles@hcde-texas.org)

713-316-4254

**Contract Partner:** Construction Masters of Houston



**Contract Partner Web Site:**

<http://www.cmhou.com>

**Approved Market Area:** TX

**Texas Regional Centers:** Region 4  
Primary

**APPROVED PRODUCT OR SERVICE:**

IDIQ Construction and Maintenance (Job Order Contracting)

**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](mailto:ecatalog@choicepartners.org)

**Freight Terms:** -

**HUB Status:** No

**MWBE Status:** No

**SBE Status:** No

**DUE DILIGENCE:** [Download](#)

**ABOUT THIS PARTNER:**

Construction Masters of Houston, Inc is a privately owned, mid-size general contracting firm based in Pearland, Texas. Robert Campbell started the company in 1987 with the belief that honesty, integrity and reliability would be the key elements to providing the Greater Houston Area with general contracting and construction management services.

Constructing buildings is a passion of ours and we do not take the responsibility of quality and customer satisfaction lightly. We have dedicated our careers to cultivating relationships, beyond the responsibilities of constructing a building, so that an organization's mission, culture and values are encompassed.



# GET A QUOTE

- Members select a category of contract.
- 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

TASA/TASB txEDCon22 (September 23, 2022) ▼

### TASA/TASB txEDCon22

( September 23 - 25, 2022 )

Booth 1000 is where you will find us in San Antonio for the convention.



# FAQ's

About Choice Partners

All-in-One Cooperative

Procurement Process

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Contact Us

## 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

**About Choice Partners**

**All-in-One Cooperative**

**Procurement Process**

**Member Reviews**

**FAQs**

**Current News**

**COVID-19**

**Vendor Spotlight**

**Events**

**Presentations**

**Contact Us**

<a href="#">Joann Nichols, RTSBA</a>	Assistant Director/Construction & Commodities	877-696-2122
<a href="#">Trisha Prestigiacomo, RTSBA</a>	Assistant Director/Food	713-696-0742
<a href="#">Stephen Kendrick, RTSBA</a>	Sr. Mgr. Facility Planning	713-696-8252
<a href="#">Kristi Nichols, RTSBA</a>	Contract Manager	713-696-1337
<a href="#">Michael Robles, RTSBA</a>	Contract Manager	713-316-4254
<a href="#">Monique Joseph-Francis, CTSBO</a>	Contract Manager	713-316-4259
<a href="#">Steve Gibson, CPSM</a>	Contract Manager	713-681-6052
<b>vacant</b>	Contract Coordinator	713-696-8208
<a href="#">Laura Sprehe, RD, LD, MPH, RTSBA</a>	Contract Manager/Food	713-696-8213
<a href="#">Monica Niles</a>	Contract Coordinator/Food	713-696-8209
<b>vacant</b>	Contract Assistant/Food	713-696-8243

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





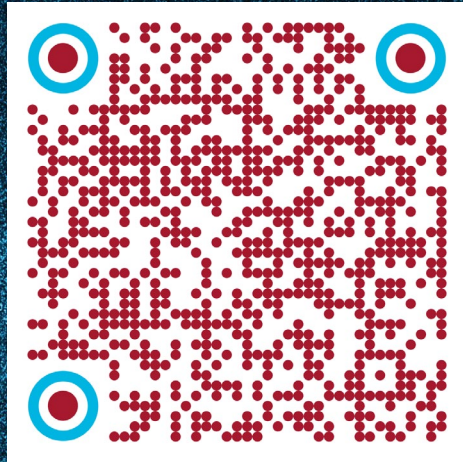
# ACTION ITEMS AND TAKEAWAYS

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





# Survey



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

# SURVEY





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



# 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)



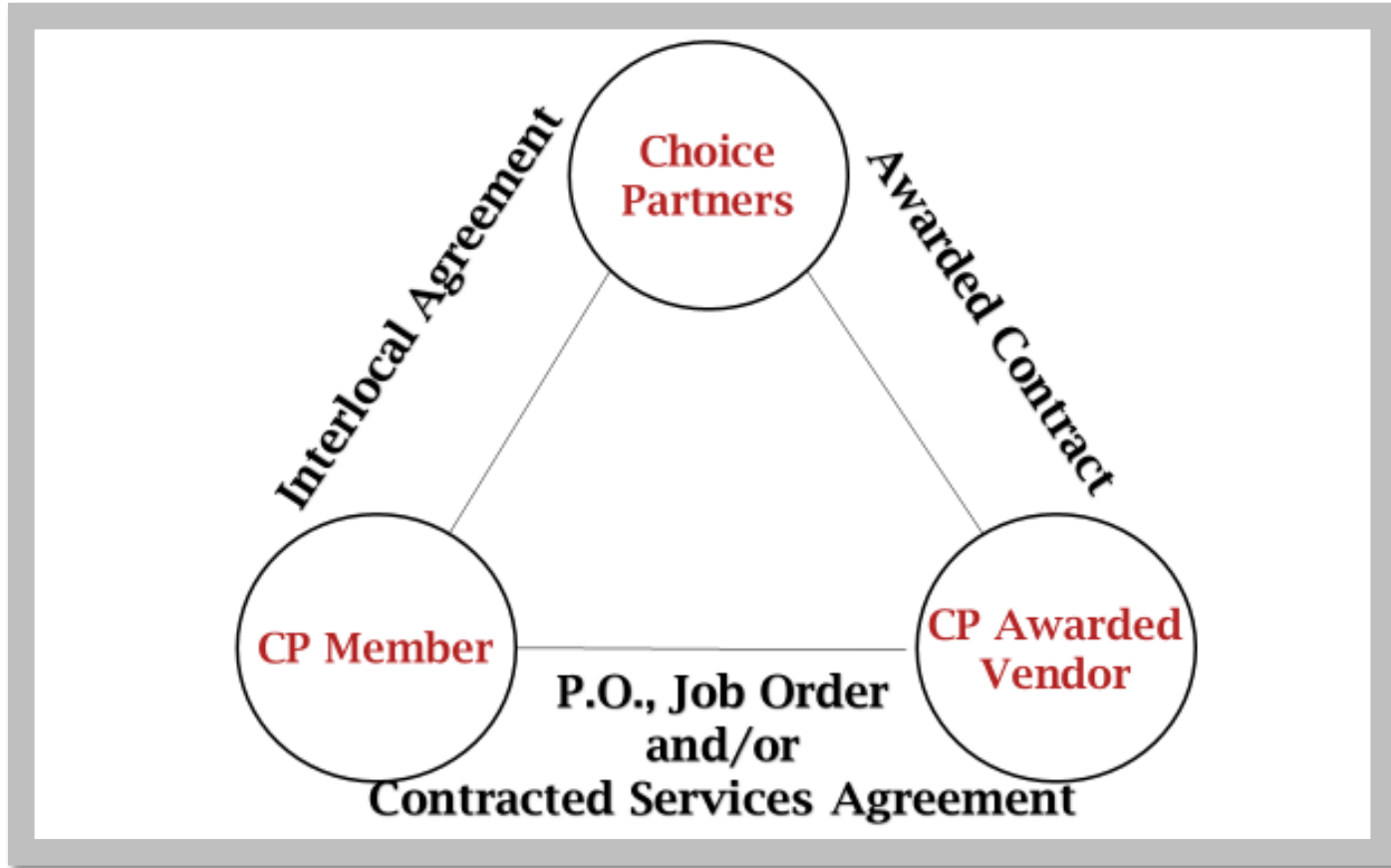
Repair &  
Maintenance

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									
<b>Vendor Name</b>									
<b>Job Description</b>									
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 <b>Total with Coefficient (.95 x RS Means Total)</b>					\$ 128,783.34				
Additional Discount of XX% good for current project only					\$ 115,905.01	***Optional if you need to give additional discount to be competitive.			
2% Bond (Any additional Pass-Through Costs)					\$ 2,318.10				
<b>Total Project Quote</b>					\$ 118,223.11				





# 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



## 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



# 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)



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# Survey



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

# SURVEY





Looking forward to working with you!



**Contact your Choice Partners  
contract manager to get started.**



# Contact Information

6005 Westview | Houston TX 77055

Tel 713-696-0786 **or** 1-877-696-2122

[www.choicepartners.org](http://www.choicepartners.org)

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**Kay:** [kay@choicepartners.org](mailto:kay@choicepartners.org)  
**Shandra:** [shandra@choicepartners.org](mailto:shandra@choicepartners.org)

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**Supplies:** [supplyreporting@choicepartners.org](mailto:supplyreporting@choicepartners.org)

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## Field Representative

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