



The Right Resources. Right Now.

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MEET THE CP STAFF



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“NEWEST” MEMBERS OF THE CP STAFF

❖ Daniele Ferreira  
Digital File Clerk



❖ Brandy Dean  
Administrative Assistant



❖ DaJuan Forstall  
Contract Billing Clerk



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**CHOICE PARTNERS COOPERATIVE**

## VENDOR ORIENTATION AGENDA

<p><b>10:00 to 10:15 am.</b> Welcome and Introduction Choice Partners Cooperative *CHOICE CASH</p> <p><b>10:15 to 10:50 am.</b> Growing Your Business</p> <p><b>10:50 to 11:05 am.</b> *VENDOR EXHIBIT *NUTRITION/PRODUCT SHOW Food/Cafeteria Contracts</p>	<p><b>11:05 to 11:30 am.</b> Legal Requirements</p> <p><b>11:30 to 11:40 am.</b> Break for Lunch</p> <p><b>11:40 am. to 12:40 p.m.</b> Job Order Contracting</p> <p><b>12:40 - 1:00 pm.</b> Closing Remarks</p>
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**CHOICE PARTNERS COOPERATIVE**

## WELCOME

Contract is **broader** than HCDE  
*School districts, charter schools, counties,  
 municipalities, colleges, universities*

### WIN – WIN – WIN

How can we help you?

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**CHOICE PARTNERS COOPERATIVE**

## WIN, WIN, WIN

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  graph TD
    CP[Choice Partners] --- Intro[Introductory Agreement] --- CM[CP Member]
    CP --- Award[Awarded Contract] --- CV[CP Awarded Vendor]
    CM --- PO[P.O., Job Order and/or Contracted Services Agreement] --- CV
  
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## 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

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## THE 5 PILLARS WE SUPPORT

**GRADUATE BEING EDUCATED PERSONS ENT**

ABLE EDUCATION: 8,121

CHIEF OF STATE: 51,885

**IMPACT BEING COVER ACHIEVE**

STATE POLICE: 3,409

CHOICE PARTNERS: 528

**SUCCESS EDUCATION PREPARE NUTRITION HEALTH**

HEAD START: 3,409

EDUCATION CERTIFICATES: 1,489

**STUDENT ACADEMIC ACHIEVER SCHOLAR OPPORTUNIST LEARNER**

SPECIAL SCHOOLS: 729

SECRETARY: 42

**TREATMENT HELPFUL BENEFIT UNDERSTANDING PATIENCE INSURE ANALYSIS**

THERAPY SERVICES: 18,896

TEACHERS AND LEARNER CENTER: 9,200

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## REBATE PROGRAM



**REBATE PROGRAM**

- Eligible for rebate on all CP purchases
- Rebate amount is 2% of purchase price
- Rebate is credited to your account within 30 days of purchase
- Rebate is subject to certain restrictions

Rebate Program CP's Rebate Authority

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**CHOICE PARTNERS COOPERATIVE**

## CONTRACT MANAGERS



**Michael Robles**  
(top left)  
JOC Contracts

**Steve Gibson**  
(top right)  
Commodities (Products & Services) Contracts

**Ashlee Kane**  
(bottom left)  
Food/Nutrition Contracts

**Tami Cyrus**  
(bottom right)  
Trade JOC Contracts

**Monique Francis**  
(center)  
Technology/Commodities Contracts

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**CHOICE PARTNERS COOPERATIVE**

## 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?

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**CHOICE PARTNERS COOPERATIVE**

## 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

**Helpful Links**

[Set Up a New Account](#)  
Forgot your password? [Click here](#)  
To assist you, please close the popup window to login on this page again.

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## VENDOR DASHBOARD

**Vendor Dashboard**

Welcome, Jane Lopez, JPL@cp

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 **edit** 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 877-686-3122 for help and information you need.

**View Vendors**  
View members from the contract you are awarded.

**View Members**  
View members from the contract you are awarded.

**Marketing Resources**  
Get Marketing Resources with seal and guidelines.

**Partners Messages**  
Get latest contract tips and news from members.

**eBid**  
Go to eBid and understand the contract.

**RECENT ACTIVITY**

JANISIA LOPEZ (JPL@CP)  
August 22, 2022

JANISIA LOPEZ (JPL@CP)  
August 19, 2022

**EVENTS**

2022 Annual Events and Fundraising Event  
August 19, 2022

2022 News Announcements of Contracts, Candidates, and Bids  
August 16, 2022

2022 News Announcements of Contracts, Candidates, and Bids  
August 16, 2022

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## 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 (717-696-1273) 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 [List of markets to government entities documents](#) 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

Rebidding Sales

Bond Elections

Graphics

eBid

Logout

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## 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

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**MARKETING RESOURCES - CP SEAL**



**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 HCD Client Engagement (331.655.1313) 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, 713-696-1279, [jwachs@hcd-texas.org](mailto:jwachs@hcd-texas.org) for other file formats.



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**FEATURED VENDOR**



**Become a Featured Vendor in CP Newsletter**

- Have 3+ members (not from same entity) that have used your contract and are satisfied.
- Speak with your contract manager to request to be featured. Request will be reviewed for status of vendor reporting and usage.
- MCE will contact vendor to share interview questions and request pictures to support the article.
- 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*

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**MEMBER CONTACT LIST**



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

**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.

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## MEMBER LOGIN

### Member Login

If you are already a member, select "Get 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

**Helpful Links**  
[Get Up a New Account](#)  
[Automatic Contracts](#)  
[Forgot your password?](#)

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## MEMBER DASHBOARD

### Members Dashboard

Welcome Jackie Lopez Jaime  
 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 Orders with their complete documentation to help make purchase logic
- Access our Supply Catalog and other pricing catalogs
- Download useful data/reports/processing data.

For more information, contact Choice Partners or call 877-696-2322 for immediate assistance. Our goal is to support you in finding the right resources, right now!

**Get A Quote**  
 Get a quote for your project. It's quick and easy. You'll get a quote within 48 hours.

**Current Members**  
 Manage your current members. You can add, edit, or delete members.

**Contract List**  
 View a list of all your current contracts.

**Food**  
 Add your purchase order here.

**Order Portal**  
 Add your purchase order here.

**RECENT ACTIVITY**

Vendor Order Status  
 Order No. 1001  
 Location Dallas-Ark-005  
 Jul 16, 2023

**EVENTS**

2023 Annual Recycled Products Symposium  
 August 16, 2023

2023 Choice Partners of America Conference  
 August 16, 2023

2023 Food Service Business Conference  
 September 12, 2023

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## VENDOR CONTACT INFORMATION

### Tarkett USA Inc. Print Info

**Contract Category:** Flooring Services (JOC-IDQ)  
**Contract Number:** 21021MAJ-36  
**Contract Terms:**  
 Initial Award Date: February 24, 2021  
 1<sup>st</sup> Renewal Start Date: February 24, 2022  
 Current Expiration Date: February 23, 2024  
 Renewal Options Remaining: 2

**CP Contract Manager:**  
 Tami Cyrus  
[tami.cyrus@choicepartners.org](mailto:tami.cyrus@choicepartners.org)  
 713-866-1337

**Contract Partner:** Tarkett USA Inc.  
  
**Contract Partner Web Site:**  
<https://www.tarkett.com/en-us>  
**Approved Market Area:** National

**CONTACT INFO**

**For SALES**  
**Jeff Newman**  
 6010 C Washington Ave  
 Houston, Texas 77007  
**Phone :** 214-749-0863  
**Cell Phone :** 713-824-4812  
**Fax :** 866-718-9029  
[jeff.newman@tarkett.com](mailto:jeff.newman@tarkett.com)

**For SALES**  
**Paul Baker**  
 6010 C Washington Ave  
 Houston, Texas 77007  
**Cell Phone :** 713-724-2812  
[Paul.Baker@tarkett.com](mailto:Paul.Baker@tarkett.com)

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## DUE DILIGENCE / PARTNERSHIP

**Construction Masters of Houston**

**Contract Category:** Construction-  
CIC (JCRC-002)

**Contract Number:** 201917MR-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  
 3<sup>rd</sup> Renewal Start Date: February 26, 2023  
 Current Expiration Date: February 26, 2024  
 Renewal Options Remaining: 0

**CP Contract Manager:**  
 Michael Robles  
[michaelrobles@choicemasters.com](mailto:michaelrobles@choicemasters.com)  
 713-336-4264

**Contract Partner:** Construction Masters of Houston

**Contract Partner Web Site:**  
[www.choicemasters.com](http://www.choicemasters.com)

**Approved Market Area:** TX

**Texas Regional Centers:** Region 4 Primary

**APPROVED PRODUCT OR SERVICE:**  
 (CIC) 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 post on the construction job Purchase Order view. All contracts are EDGAR compliant.

**PRICING:** is according to the contract on file with CP. Send all PO copies to [achoice@choicemasters.com](mailto:achoice@choicemasters.com)

**Flight Name:**

**HOW ISSUED:** NO

**WHERE ISSUED:** NO

**ONE SOURCE:** NO

**DUE DILIGENCE:** (continued)

**ABOUT THIS PARTNER:**  
 Construction Masters of Houston, Inc is a privately owned, mid-size general contracting firm based in Houston, Texas. Robert Campbell, founder of 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.

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## 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.



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## EVENTS

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

Home • Member Dashboard • Events

**Events**

September 2023

START DATE	END DATE	INDUSTRY	EVENT NAME	LOCATION
09/11/2023	09/11/2023	Oil, Gas & Chemicals	2023 Pump Panel Business Session	Houston, Texas
09/11/2023	09/11/2023	Oil, Gas & Chemicals	2023 Pump Panel Business Session	Houston, Texas
09/11/2023	09/11/2023	Oil, Gas & Chemicals	2023 Pump Panel Business Session	Houston, Texas
09/11/2023	09/11/2023	Oil, Gas & Chemicals	2023 Pump Panel Business Session	Houston, Texas

[Send Email](#)  
[Send SMS](#)  
[Cancel My Alerts](#)  
[My Profile](#)  
[My Account](#)  
[My Alerts](#)

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**CHOICE PARTNERS COOPERATIVE**

## FAQ's

About Choice Partners

All-in-One Cooperative

Procurement Process

Member Services

FAQs

Current News

COVID-19

Vendor Spotlight

Events

Presentations

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 HCOE 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. [See website](#) for our vendors.

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**CHOICE PARTNERS COOPERATIVE**

## 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

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**CHOICE PARTNERS COOPERATIVE**

## NUTRITION / PRODUCT, & VENDOR EXPO

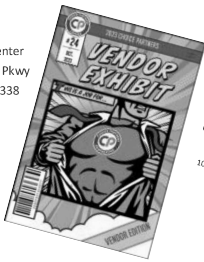


**DATE:**  
October 18, 2023

**TIME:**  
8 a.m. - 1 p.m.  
(Booths allowed from 10:30 a.m. - 1 p.m.)

**WHERE:**

Humble Civic Center  
8233 Will Clayton Pkwy  
Humble, TX 77338



**DATE:**  
October 19, 2023

**TIME:**  
10 a.m. - 1 p.m.

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**CHOICE PARTNERS COOPERATIVE**

## VENDOR BOOTH REGISTRATION

❖ **REGISTRATION:**

- [www.choicepartners.org/vendor-registration](http://www.choicepartners.org/vendor-registration)
- For this year's event we are once again using the online registration/event platform called Wisen Events (formerly Socio). If you see any issues or have any questions, please let us know.
- For the Nutrition & Product Expo: **Trisha Prestigiacomo** (713-636-0742) or [tprestig@choicepartners.org](mailto:tprestig@choicepartners.org) and for Vendor Exhibitor **Jane Lopez** (713-636-2122) [jlopez@choicepartners.org](mailto:jlopez@choicepartners.org) will be your "go-to" for the online registration platform.

❖ **BOOTH FEE:**

- Each booth fee is \$450 if paying by check and \$490 plus a service fee (up to approximately \$3.75) for credit card payments.
- If paying by check, make all checks payable to:
- Harris County Department of Education
- Mail check payments to:
- Choice Partners (Attn: Jane Lopez) 6005 Westview Dr., Houston, TX 77056
- (check must be received in our office by September 16, 2023)

❖ **ELECTRICAL:**

- **Electrical fees** - option is available at registration
- Payment (by check or credit card) for electricity needs to be paid directly to the Humble Civic Center.

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**CHOICE PARTNERS COOPERATIVE**

## VENDOR BOOTH REGISTRATION CONTINUED...

❖ **WE ARE LOOKING FOR 10 VENDORS TO BE THIS YEAR'S GOLD SPONSOR!!**

- PLEASE RESPOND IN YOUR REGISTRATION IF YOU ARE INTERESTED
- GOLD SPONSORSHIP INCLUDES:
  1. PREFERRED BOOTH LOCATION (UP FRONT/CORNER BOOTHS)
  2. RECOGNITION THROUGHOUT THE EVENT
  3. YOUR COMPANY'S LOGO ON THE ATTENDEE'S T-SHIRT
  4. SUBMISSION OF ANY POINT-OF-SALE LITERATURE/PROMO MATERIALS TO BE INSERTED IN ATTENDEE'S EXHIBIT BAG
- FEE FOR GOLD SPONSORSHIP HOST THE MEMBER APPRECIATION DINNER
- EACH GOLD SPONSORSHIP COMES WITH 2 TICKETS TO THE DINNER
- THE EVENT IS HELD BEFORE THE EXPO - TUESDAY, OCTOBER 17<sup>TH</sup> BEGINNING AT 5:30 PM
- VENUE: THE FEDERAL GRILL - 8791 KATY FWY STE. 150
- ATTENDEES: AREA DIRECTORS / ASST DIRECTORS, PROCUREMENT MANAGEMENT, FOOD SERVICE DIRECTORS/ASST DIRECTORS AND THEIR GUESTS.
- THE FEE TO SPONSOR THIS EVENT VARIES BUT HAS TYPICALLY BEEN AROUND \$500 PER SPONSOR.
- CREDIT CARDS WILL BE GATHERED AS YOU WALK INTO THE EVENT FOR PAYMENT. FINAL BILL WILL BE SPLIT BETWEEN ALL SPONSORS AT THE END OF THE NIGHT.

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**CHOICE PARTNERS COOPERATIVE**

## FOOD / NUTRITION TEAM

**Trisha Prestigiacomo**  
Assistant Director  
(center)

**Rosie Contreras**  
Contract Assistant  
(top left)

**Monica Niles**  
Contracts Coordinator  
(bottom left)

**Ashlee Kane**  
Contract Manager  
(bottom right)



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**CHOICE PARTNERS COOPERATIVE**

## 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 Produce
- Frozen and Chilled Beverages
- Ice Cream
- Pizza Delivery
- Snacks and Beverages
- Technical Services & Products




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**CHOICE PARTNERS COOPERATIVE**

## LEGAL REQUIREMENTS



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**CHOICE PARTNERS COOPERATIVE**

## BUSINESS FOUNDATIONS

- Both Member and Vendor strive for a simple path to a successful transaction
  - ✓ Vendors want to reduce cost of sales
  - ✓ Members want to reduce cost of procurement
  - ✓ Both parties benefit by using an existing contract and avoiding of procurement delays
- At its essence, the cooperative contract is an agreement to supply "IDIQ" a predetermined product or service at a predetermined cost to predetermined set of customers

In U.S. Federal government contracting, IDIQ is an abbreviation of the term Indefinite delivery/indefinite quantity. This is a type of contract that provides for an indefinite quantity of supplies or services during a fixed period of time. (Wikipedia)

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**CHOICE PARTNERS COOPERATIVE**

## 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
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Harris County Department of Education | EDGAR/Uniform Guidance (2 CFR 200) | HB 1295 | TEC 51.9335 Higher Education

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**CHOICE PARTNERS COOPERATIVE**

## Orders of Benefit "Layer Cake"

Help the customer

get what they want

legal and compliant

from you

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**CHOICE PARTNERS COOPERATIVE**

## 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

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**CHOICE PARTNERS COOPERATIVE**

### 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>

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**CHOICE PARTNERS COOPERATIVE**

### 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

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**CHOICE PARTNERS COOPERATIVE**

### CONTRACTS



FOOD/CAFETERIA | TECHNOLOGY | COMMODITIES | SERVICES | FACILITIES

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**CHOICE PARTNERS COOPERATIVE**

### 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 CPFee to the quotation?  
 A) True  
 B) False (RFP) 1.28

3. Pricing may be changed at any time in the contract period?  
 A) True  
 B) False (RFP) 5.29.

4. New Items may be added to the contract pricing/catalog?  
 A) Anytime  
 B) At renewal  
 C) Following approval from HCDE (RFP) 5.36.

5. Vendors' standard terms and conditions do not apply when using the Choice Partners contract?  
 A) True (RFP) 1.2,6; 5.5, 5.14, 5.26.  
 B) False

6. What does IDIQ stand for?  
 A) Impled discount in quotation  
 B) Indefinite delivery, indefinite quantity

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**CHOICE PARTNERS COOPERATIVE**

### 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 CPFee to the quotation?  
 A) True (RFP) 1.28  
 B) False

3. Pricing may be changed at any time in the contract period?  
 A) True (RFP) 5.29.  
 B) False

4. New Items may be added to the contract pricing/catalog?  
 A) Anytime (RFP) 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 (RFP) 1.2,6; 5.5, 5.14, 5.26.  
 B) False

6. What does IDIQ stand for?  
 A) Impled discount in quotation  
 B) Indefinite delivery, indefinite quantity

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**CHOICE PARTNERS COOPERATIVE**

### 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

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### Reporting Template - Commodities

**Choice Partners Monthly Reporting Form**  
When complete email to [comreporting@choicepartners.org](mailto:comreporting@choicepartners.org)

Vendor Name: \_\_\_\_\_  
 Contract Number: \_\_\_\_\_  
 Month Ending: \_\_\_\_\_  
 Year: \_\_\_\_\_

Name of Person Submitting: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 Date: \_\_\_\_\_

Please list the correct contract number for each entity's sale

	\$ Amount	Member Name	Date	PO Number	Contract Number
1					
2					
3					
4					
5					
6					
7					
8					
9					
T	\$0.00	TOTAL			

43

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### Reporting Template – J.O.C

**Choice Partners Monthly Reporting Form**  
When complete email to [comreporting@choicepartners.org](mailto:comreporting@choicepartners.org)

Vendor Name: \_\_\_\_\_  
 Contract Number: \_\_\_\_\_  
 Month Ending: \_\_\_\_\_  
 Year: \_\_\_\_\_

Name of Person Submitting: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 Date: \_\_\_\_\_

Please list the correct contract number for each entity's sale

	\$ Amount	Member Name	Date	PO #	Contract #
1					
2					
3					
4					
5					
6					
7					
8					
9					
T	\$0.00	TOTAL			

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### Reporting Template - Food

**Choice Partners Monthly Reporting Form**  
When complete email to [foodreporting@choicepartners.org](mailto:foodreporting@choicepartners.org)

Vendor Name: \_\_\_\_\_  
 Contract Number: \_\_\_\_\_  
 Month: \_\_\_\_\_  
 Year: \_\_\_\_\_

Name of Person Submitting: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 Date: \_\_\_\_\_

Please list the correct contract number for each entity's sale

	\$ Amount	Member Name	Date	PO #	Contract #
1					
2					
3					
4					
5					
6					
7					
8					
9					
T	\$0.00	TOTAL			

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### CHECK LIST

**AWARDED**

**PROCUREMENT**

**ADMIN FEE**

**REPORTING**

**INVOICING**

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### Survey



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

# SURVEY

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## Job Order Contracting (JOC)

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**Objectives**

- Why JOC?
- Maintenance vs. Construction
- Concepts including Trade JOC & Quoting vs. Bidding
- How to Legally Use a CP JOC Contract

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**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

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**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**

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**CHOICE PARTNERS COOPERATIVE**

### 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*

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**CHOICE PARTNERS COOPERATIVE**

### 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

<b>JOC contract</b> (TGC 2269)	↑	Repair & Maintenance
<b>Maintenance Contract</b> (TEC 44.031)	↓	Construction Services

OSHA Letter to Raymond Knobb (11.18.2003)

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**CHOICE PARTNERS COOPERATIVE**

### WIN, WIN, WIN

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    graph TD
      CP[Choice Partners] --- Intro[Introductory Agreement] --- CM[CP Member]
      CP --- Award[Awarded Contract] --- CV[CP Awarded Vendor]
      CM --- PO[P.O., Job Order and/or Contracted Services Agreement] --- CV
  
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## 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

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## 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

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## JOC/IDIQ Estimate

HWAC Example

Item	Description	Unit	Qty	Unit Price	Amount	Subcontractor	Notes
1	Total labor to install of the 12 in. x 18 in. x 24 in. concrete pipe for 1000 ft. (1000 LF) @ 1.0000	LF	1000	1.0000	1000.00	See UPB Item 1212	Concrete pipe 12" x 18" x 24"
2	Concrete pipe 12" x 18" x 24" (1000 LF) @ 1.0000	LF	1000	1.0000	1000.00	See UPB Item 1212	Concrete pipe 12" x 18" x 24"
3	Concrete pipe 12" x 18" x 24" (1000 LF) @ 1.0000	LF	1000	1.0000	1000.00	See UPB Item 1212	Concrete pipe 12" x 18" x 24"
4	Concrete pipe 12" x 18" x 24" (1000 LF) @ 1.0000	LF	1000	1.0000	1000.00	See UPB Item 1212	Concrete pipe 12" x 18" x 24"
5	Concrete pipe 12" x 18" x 24" (1000 LF) @ 1.0000	LF	1000	1.0000	1000.00	See UPB Item 1212	Concrete pipe 12" x 18" x 24"
6	Concrete pipe 12" x 18" x 24" (1000 LF) @ 1.0000	LF	1000	1.0000	1000.00	See UPB Item 1212	Concrete pipe 12" x 18" x 24"
7	Concrete pipe 12" x 18" x 24" (1000 LF) @ 1.0000	LF	1000	1.0000	1000.00	See UPB Item 1212	Concrete pipe 12" x 18" x 24"
8	Concrete pipe 12" x 18" x 24" (1000 LF) @ 1.0000	LF	1000	1.0000	1000.00	See UPB Item 1212	Concrete pipe 12" x 18" x 24"
9	Concrete pipe 12" x 18" x 24" (1000 LF) @ 1.0000	LF	1000	1.0000	1000.00	See UPB Item 1212	Concrete pipe 12" x 18" x 24"
10	Concrete pipe 12" x 18" x 24" (1000 LF) @ 1.0000	LF	1000	1.0000	1000.00	See UPB Item 1212	Concrete pipe 12" x 18" x 24"
Subtotal					10000.00		
Subcontractor Fee (10%)					1000.00		
Total JOC/IDIQ Estimate					11000.00		

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### 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

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### 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

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### 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.

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### 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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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

**Stephen Kendrick, RTSBA**  
*Sr. Manager of Facilities Planning*  
 Office: 713-696-8252  
 Cell: 281-773-3036  
 skendrick@hcd-texas.org

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### Survey



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

# SURVEY

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**Looking forward to working with you!**



Contact your Choice Partners contract manager to get started.

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**Contact Information**

6005 Westview | Houston TX 77055  
 Tel 713-696-0786 or 1-877-696-2122  
[www.choicepartners.org](http://www.choicepartners.org)

Follow us:  
[www.twitter.com/choice\\_partners](https://www.twitter.com/choice_partners)  
[www.linkedin.com/company/choice-partners](https://www.linkedin.com/company/choice-partners)

Email: [info@choicepartners.org](mailto:info@choicepartners.org) or [jeff@choicepartners.org](mailto:jeff@choicepartners.org)

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**Contacts**

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<p><b>Contract Compliance</b></p> <p>Mary: <a href="mailto:mary@choicepartners.org">mary@choicepartners.org</a>        Sophie: <a href="mailto:sophie@choicepartners.org">sophie@choicepartners.org</a></p>	<p><b>Field Representatives</b></p> <p>Ann Marie Harbour: <a href="mailto:annmarie@choicepartners.org">annmarie@choicepartners.org</a>        Brittany Webber: <a href="mailto:brittany@choicepartners.org">brittany@choicepartners.org</a>        Heather Foster: <a href="mailto:heather@choicepartners.org">heather@choicepartners.org</a>        Guy Wallace: <a href="mailto:guy@choicepartners.org">guy@choicepartners.org</a>        Bill Sherer: <a href="mailto:bill@choicepartners.org">bill@choicepartners.org</a></p>

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The Right  
Resources.  
Right Now.

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

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