

PROSPECTIVE VENDOR WEBINAR





PRESENTERS



Jeff Drury Sr. Director <u>Jeff@choicepartners.org</u> 713.696.0786



Joann Nichols
Assistant Director
joann@choicepartners.org
713.696.2122



Stephen Kendrick Sr. Mgr. Facility Planning Skendrick@hcde-texas.org 713.696.8252



Steve Gibson Contract Manager steve@choicepartners.org 713.681.6052



Michael Robles Contract Manager michael@choicepartners.org 713.316.4254



Janet Wachs C.E. Asst. Director janet@choicepartners.org 713.696.1379





AGENDA

PART 1 (10 a.m. to 11:00 a.m.)

10:00 to 10:15 a.m.

Welcome and Introduction
Choice Partners Cooperative

10:15 to 10:30 a.m.

Legal Requirements,

10:30 to 10:45 a.m.

Growing Your Business

10:45 to 11:00 a.m.

eBid introduction

PART 2 (11:00 a.m. to 12:30 p.m.)

11:00 to 12:00 p.m.

Job Order Contracting

12:00 to 12:15 p.m.

Q & A

12:15 -12:30 p.m.

Closing



WELCOME

Jeff Drury

Senior Director of Choice Partners

Contract is **broader** than HCDE

School districts, charter schools, counties, municipalities, colleges, universities

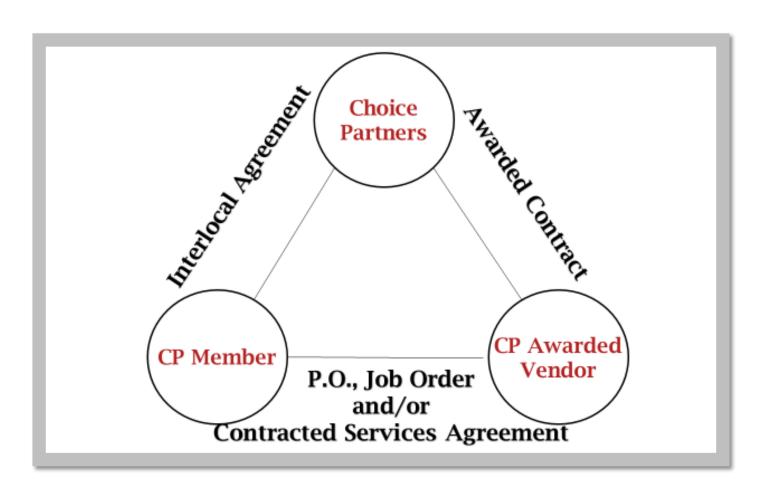
WIN - WIN - WIN

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





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 WHY IS THAT IMPORTANT?

- Repeat business
- Dollar thresholds of local government entity
- Satisfies requirement for procurement process (TEC 44.031(a) and others)
- Single award to sell to multiple entities
- Less bids/RFPs to respond to
- Not-to-exceed pricing applies to all members
- At members discretion

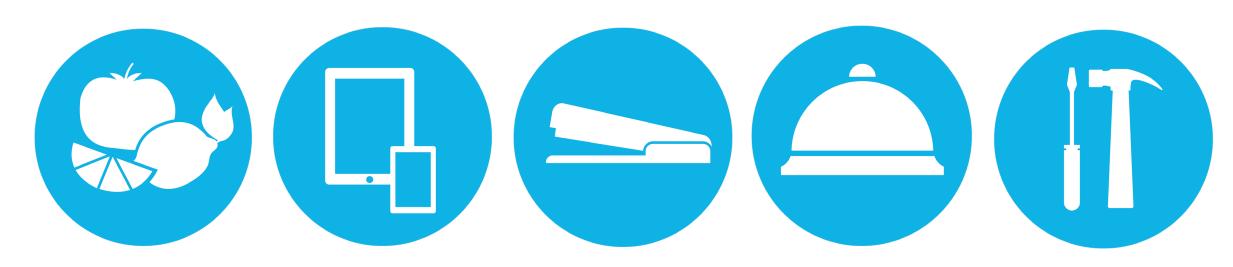


WHY YOUR GOV'T CUSTOMERS ARE USING COOPERATIVE PURCHASING

- Reduce the number of bids to prepare, issue, and monitor
- Appropriate for many needs (but not all)
- Labor in preparing bids/RFPs can be used elsewhere
- Shift procurement cost (and risk) to the cooperative
- 90-days is average time for RFP from development to award. 45-60 for a bid
- Flexibility and convenience to work with the vendors on established pricing and better discounts
- Cooperative Purchasing authorized by Texas Gov't Code 791, LGC 271, TEC 44.031(a) and others



CONTRACTS



FOOD/CAFETERIA TECHNOLOGY COMMODITIES SERVICES FACILITIES



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?



Register to Become a CP Vendor

Become a Vendor

To be awarded a contract within HCDE Choice Partners Cooperative, vendors must follow these few simple steps:

- 1. Register as a supplier in the eBid System you only become a BIDDER not an awarded vendor
- 2. Respond to a specific bid or proposal advertised by HCDE/Choice Partners
- 3.Be awarded a contract by the HCDE Board of Trustees





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 Jeff Drury

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.

eBid

Go to ebid and view/respond to current bids

RECENT ACTIVITY

2021 February Press Release March 25, 2021

2021 January Press Release
January 27, 2021

EVENTS

TASBO Marketplace and Annual Conference December 11, 2020

<u>CP Member Workshop</u> (<u>Virtual with registration</u>) April 14, 2021

TAPPA 2021 (Virtual Conference) April 26, 2021



VENDOR DASHBOARD

Marketing Resources

Find marketing tips.

conference/membership lists,

reporting files and more

Vendor Dashboard

Welcome Admin Admin

As 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.

You may:

- · View your contract information page as members see it
- · Access the list of members
- · Login to eBid system

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

Partners Messages

Get latest vendor news and view new members

View Members

Search members by name, type, state and region

eBid

Go to ebid and view/respond to current bids

RECENT ACTIVITY

2020 April Press Release April 20, 2020

February 2020 Press Release
March 5, 2020

EVENTS

TASBO Annual Conference

March 2, 2020

Texas Library Association

March 24, 2020

<u>CMAT</u>

March 31, 2020





VENDOR CONTACT INFORMATION

Balfour Company

Contract Category: Graduation Items, Yearbooks & Commemorative

Items

Contract Number: 19/012KC-01

Contract Terms:

Initial Award Date: February 27, 2019 1st Renewal Start Date: February 27, 2020 Current Expiration Date: February 26, 2021 Renewal Options Remaining: 2

CP Contract Manager:

Steve Gibson steve@choicepartners.org 713-681-6052 Print Info.

Contract Partner: Balfour Company

balfour.

Contract Partner Web Site: http://www.aaljackets.com

Approved Market Area: National

CONTACT INFO

For SALES

Butch Milks

8525 Westland West Blvd Houston, Texas 77041 **Phone:** 832-912-8000 **Cell Phone:** 713-882-3222

Fax: 832-912-8005

butchm@balfourhouston.c

<u>om</u>

For SALES

Matt Milks

8525 Westland West Blvd. Houston, Texas 77041 **Phone:** 832-912-8000 **Fax:** 832-912-8005

mattm@balfourhouston.co

m

For SALES

Butch Milks

8525 Westland West Blvd. Houston, Texas 77041 **Phone:** 832-912-8000 **Fax:** 832-912-8005

butchm@balfourhouston.c

<u>om</u>





DUE DILIGENCE / PARTNERSHIP



Contract Category: Construction-

JOC (JOC-IDIQ)

Contract Number: 16/054JN-04

Contract Terms:

Initial Award Date: August 16, 2016 1st Renewal Start Date: August 16, 2018

2nd Renewal Start Date: August 16, 2019 Current Expiration Date: August 15, 2020

Renewal Options Remaining: 1

CP Contract Manager:

Joann Nichols joann@choicepartners.org 713-696-2122 Contract Partner: Facilities Sources

Print Info.



Contract Partner Web Site:

http://www.facilitiessources.com

Approved Market Area: TX

APPROVED PRODUCT OR SERVICE: Maintenance, repair, alteration, renovation, remediation, or minor construction of a facility when the work is of a recurring nature but the delivery times, type and quantities of work are indefinite.

TO PLACE AN ORDER: Contact the vendor for all your pricing needs, stating you are using CP contract and send us the confirmation only Purchase Order copy

PRICING: Coefficient on file. Email confirmation copies of all PO\'s to

ecatalog@choicepartners.org

Freight Terms: N/A

HUB Status: Yes

MWBE Status: No

SBE Status: Yes

DUE DILIGENCE: Download

ABOUT THIS PARTNER:

With specialty licenses for electrical, mechanical and plumbing services, DPFS, Ltd. is able to efficiently coordinate all phases of construction, providing maximum productivity, quality and safety to its customers. This unique combination of services under one roof means one team is efficiently completing the job, ensuring maximum productivity and quality, at the least possible price, adding to customer satisfaction. Dura Pier Facilities Services foundation for success is the ability to plan and manage projects within budgets and within demanding schedules.



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) 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

<u>Marketing Resources</u>

Partners Messages

Reporting Sales

Bond Elections

<u>Graphics</u>

<u>eBid</u>

<u>Logout</u>



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.
- Complete request form found on Marketing Resources page and return to contract manager.
- Be interviewed by Client Engagement and your contract manager.
 CE 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.

Client Engagement will:

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

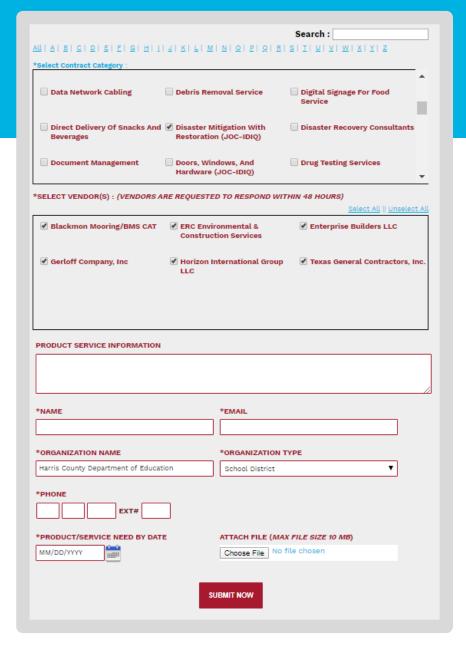
Ask your **contract manager** to provide you the **contact request form link** after you complete the three items at top.





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.





FAQ's

About Choice Partners

All-in-One Cooperative

Procurement Process

Member Reviews

FAQs

Current News

COVID-19

Vendor Spotlight

Events

Presentations

Contact Us

Frequently Asked Questions

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

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

Q: 1. What is Choice Partners?

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

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

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



STAFF CONTACT INFORMATION

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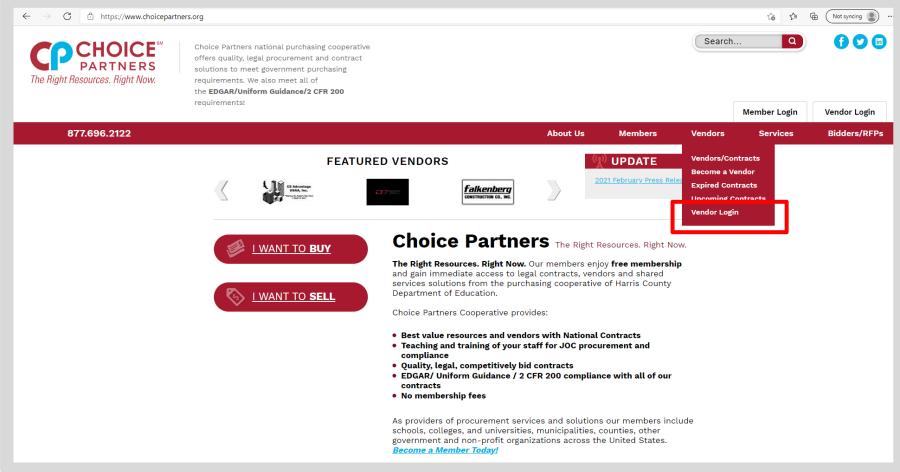
Joann Nichols, RTSBA	Assistant Director/Construction & Commodities	877-696-2122
Trisha Prestigiacomo, RTSBA	Assistant Director/Food	713-696-0742
Stephen Kendrick, RTSBA	Sr. Mgr. Facility Planning	713-696-8252
Kristi Nichols, RTSBA	Contract Manager	713-696-1337
Michael Robles, RTSBA	Contract Manager	713-316-4254
Monique Joseph	Contract Manager	713-316-4259
Steve Gibson	Contract Manager	713-681-6052
<u>Laura Sprehe</u>	Contract Manager/Food	713-696-8213
Melissa Wilder	Contract Coordinator/Food	713-696-8209
Emily Maldonado	Contract Assistant/Food	713-696-8243
Janet Wachs	CE Asst. Director	920-251-1097
Jan Arnold, CPA	Client Services Manager	713-696-0746
Mary Causey, MS, RTSBA	Contract Compliance Specialist	713-696-8270
Cora Day	Contract Coordinator	713-696-8208
Arlita Kyles, CTSBO	Contract Specialist	713-696-8241
Yvonne Johnson, CTSBO	General Office Clerk II	713-696-1886
Kay Vorish, CTSBO	Contract Assistant	713-696-0743
Shandra Powell	Clerk - General Office	713-696-1389
Fred Calhoun	Field Representative	713-203-5365
Ann Marie Harbour	Field Representative	817-703-7901
Jeff Drury, RTSBA	Sr. Director	713-696-0786



ACTION ITEMS AND TAKEAWAYS

- Register to become a vendor.
- Watch for evite to respond to RFP (request for proposal).
- Review Vendor Dashboard.
- Review Market Resources Page.







Vendor Dashboard

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USERNAME

PASSWORD

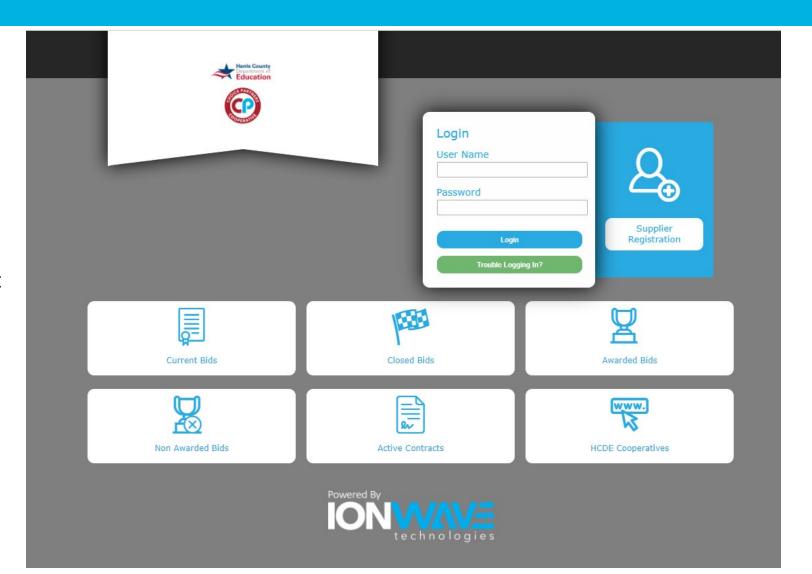
LOGIN

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.

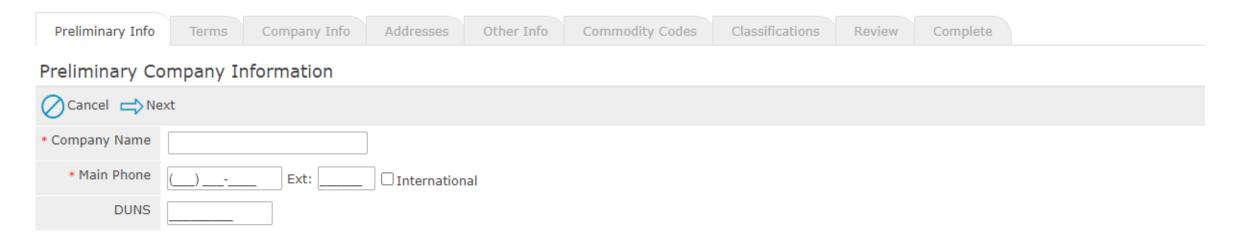


https://hcdeebid.ionwave.net











Preliminary Info

Terms

Company Info

Addresses

Other Info

Commodity Codes

Classifications

Review

Complete

HCDE Cooperatives Terms and Conditions



HARRIS COUNTY DEPARTMENT OF EDUCATION eBID WEB SITE USAGE AGREEMENT

This Agreement (the Agreement) is between Harris County Department of Education ("HCDE"), you, and, if you are registering on behalf of an entity, the entity. You and any entity you are registering on behalf of shall collectively be referred to as the ("Vendor").

IF YOU ARE REGISTERING AS A BUSINESS ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND THE ENTITY TO THIS AGREEMENT.

This registration enables the Vendor to make application for placement on HCDE's Vendor list and if approved as a Vendor, to receive Solicitation Notices, compile and submit Solicitation Responses, and view tabulated results of Solicitation Responses through the use of HCDE's on-line eProcurement and Vendor Management System ("the HCDE eBid system"), which is hosted by Ion Wave Technologies, Inc. ("IWT"), (see http://www.Ionwave.net), using IWT Software. The website through which the HCDE eBid system is accessed is hereinafter referred to as the "HCDE eBid Web Site".



Preliminary Info Terms Company Info Addresses Other Info Classifications Review Complete Commodity Codes Company Information Save and Next Company Information User Information * Trade Name (dba) * User Name / Login Legal Name (if different) * Password * Organization Type * Verify Password -- Select --Formation Date Prefix \blacksquare * Tax ID Number ● FEIN ○SSN/ITIN ○Other * First Name DUNS * Last Name Website Title Company Description * Email * Verify Email Office Phone ☐ International Keywords Use comma or [Enter] to separate keywords Mobile Phone ☐ International * Time Zone -- Select --~



HCDE eBid Supplier Registration Email Verification Required



HCDE eBid <HCDEebid@customer.ionwave.net>

To Michael Robles

(i) Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pic

Dear Supplier,

Please click the link below to verify your email address and continue the registration process. As you we be automatically saved and can be accessed at any time by clicking this link.

Click Here to Continue Registration

This link will expire in 14 days. If you have not completed your registration during this time period, it wi

Questions about this system can be directed to:

Harris County Department of Education

Email: ebids@hcde-texas.org



■ Security

Special Needs Students
Technology
Telecommunications
Transportation
Teaching and Instructional

eBid

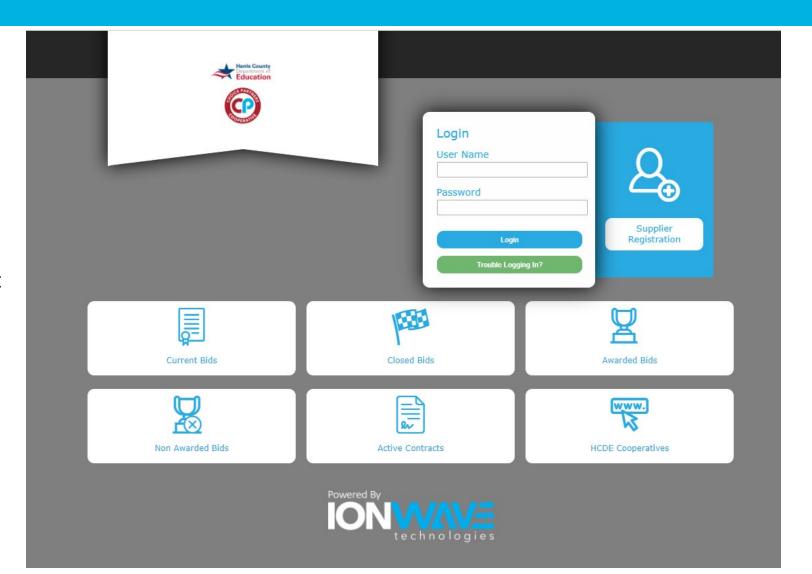
☐ Commodities	Territ County Education	Commodity Codes
由 ☐ Apparel		Commodity Codes
Appliances		- N Cause and Neut
Art Supplies		Save and Next
Recycled Art Paper	Preliminary Info Terms Company Info Addresses Other Info Comm	odity Code
Athletics	Freiminary Into Terms Company Into Addresses Other Into Comm	odity Code 🖃 Commodities
Awards, Trophies & Plaques		Apparel
Audio Visual Equipment	Commodity Codes	Apparel
☐ Technology/A.V.	Save and Next Q Search	Departmental
Maintenance Products	Jave and Next	- Departmental
Maintenance Services	■ Commodities	Formal Wear
Business Services	Apparel	
Child Nutrition	曲 ☐ Apparel	── □ Spirit Wear & Embroidery
Classroom Teaching Materials	□ Appliances	Work Uniforms
Construction Services	Art Supplies	- Work Chillionins
Consulting Services		Appliances
Curriculum Materials	Recycled Art Paper	
Janitorial Supplies	Athletics	── Dryer
■ Data Processing Supplies ■ File Cabinets	# Awards, Trophies & Plaques	Refrigerator
Papers		Neirigerator
Food Service Supplies	Audio Visual Equipment	Washer
Furniture	Technology/A.V.	
Grounds, Maintenance	Maintenance Products	Art Supplies
Health and Medical Supplies		Glu C Resouled Act Resear
Insurance	Maintenance Services	Recycled Art Paper
☐ Instructional Supplies/Equipment	Business Services	Construction Paper, Recycled
Miscellaneous	Child Nutrition	S constitution repair, necycles
Office Supplies		Roll Bulletin Board Paper, Recycled
Performing Arts	Classroom Teaching Materials	
■ Safety and Security Supplies	- Construction Services	



Preliminary Info Commodity Codes Classifications Terms Company Info Addresses Other Info Review Complete Special Classifications Save and Next Check any special business classifications that apply to your business; if none, then check "None Apply". Classifications are subject to app General Classifications **HUB - Texas Statewide Historically Underutilized Business Program** Texas Stat **Minority-Owned Business** MBE busin publicly ov and daily b American a **Small Business Enterprise** SBEs are b in accorda **Woman-Owned Business** WBE busin business, a operations None of the above classifications apply to my business



https://hcdeebid.ionwave.net





🕫 Bid Events 🔌 Auction Events 🧔 Admin

Alerts Up-to-date

No alerts!



Welcome to the HCDE eBid supplier portal!

This dashboard provides you with helpful alerts related to your activity on the system, including bid events closing soon and a list of opportunities you have been invited to. Simply click on the alert box to be taken to the appropriate area of the supplier portal. You can utilize the menu at the top to access all system functionality, including managing your supplier profile under 'Admin'.

Helpful hints:

- Periodically review your Company Profile to ensure the information is accurate. Your Commodity Code selections will help determine the bid invitations you receive.
- Add additional user accounts or utilize a generic/shared email address on your user account to ensure your company receives notifications.
- Submit your bid early! Submitting early gives you time to correct mistakes in your response or to deal with Internet/computer problems.
- Whitelist the @customer.ionwave.net email domain to ensure you receive email from our system.

Quick Links









Support Contact

For support, please contact the agency responsible for the solicitation.



Available Bids

Closed Bids

My Responses

My Awards

HCDE Internal Purchasing

HCDE Internal Purchasing

My Invitations

No records to display.

21/029IA

21/004IA-3

Bid Number	Organization	Title	Туре	Issue Date	Close Date 🔺

Oth	er Bid Opportunities					
	Bid Number	Organization	Title	Туре	Issue Date	Close Date 🔺
Q,	21/038YR	HCDE Internal Purchasing	Workforce Certification Training for Harris County Department of Education Adult Education Division	Request for Proposal	3/23/2021	4/13/2021 02:00 PM (CT)
Q	21/040SG	Choice Partners	Automotive Equipment, Tires, and Related Services	Request for Proposal	4/2/2021	4/27/2021 02:00 PM (CT)
Q _o	21/039MR	Choice Partners	CSP for JOC - IDIQ Construction	Competitively Sealed Proposal	3/12/2021	4/30/2021 02:00 PM (CT)
Q	21/042MJ	Choice Partners	Moving, Storage and Related Items	Request for Proposal	4/2/2021	4/30/2021 02:00 PM (CT)
Q	21/041LS	Choice Partners	Ice Cream Products	Request for Proposal	4/2/2021	5/3/2021 02:00 PM (CT)
Q,	21/046LS	Choice Partners	Site Based Pizza Program	Request for Proposal	4/9/2021	5/10/2021 02:00 PM (CT)
0	21/005IA-3	HCDE Internal Purchasing	CASE for Kids Content Area Services and Trainers	Request for Proposal	3/22/2021	5/18/2021 02:00 PM (CT)

Request for Proposal

Request for Proposal

5/18/2021 02:00 PM (CT)

6/22/2021 02:00 PM (CT)

3/22/2021

2/4/2021

Early Head Start Child Care Partnership

CASE for Kids Youth Services for Afterschool and Summer



Edit Bid Response - 21/039MR

Return No Bid Documents Response History Bid History Frror Check Response

Bid Number 21/039MR (CSP for JOC - IDIQ Construction)

Close Date & Time 4/30/2021 02:00:00 PM (CT)

Time Left 17 days 22 hours 26 minutes 24 seconds

Response Status NOT SUBMITTED - To complete your response, you must click 'Submit Response' in the Response Submission tab.

Event Details Questions Activities Invitations Attachments Attributes Line Items Response Attachments Response Submission

Bid Information

Bid Type	Competitively Sealed Proposal
Issue Date & Time	3/12/2021 03:28:02 PM (CT)
Close Date & Time	4/30/2021 02:00:00 PM (CT)
Bid Status	Issued
Question Cutoff Date	4/23/2021 02:00:00 PM (CT)
Bid Notes	Job Order Contracting IDIQ (indefinite Delivery Indefinite Quantity) Minor Construction, Maintenance, Repair, Alteration, Renovation and Remediation Services

Bid Contact Information

Choice Partners
Michael Robles
6005 Westview Drive
Houston, TX 77055 USA
Choice Partners
NPO
2016
(713) 3164254
mrobles@hcde-texas.org

Ship to Information

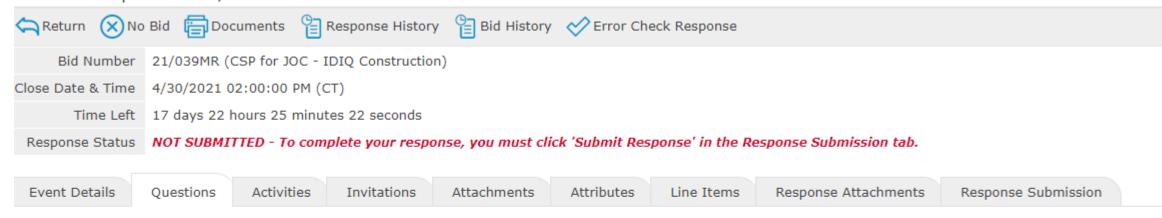
No Ship to Information

Bill to Information

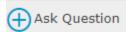
No Bill to Information



Edit Bid Response - 21/039MR



Bid Questions



Question Cutoff Date: 4/23/2021 02:00 PM (CT)

Question Evaluation Factors Item 5, page14, Vendor's safety record, including current OSHA safety report. Please specify what does it mean the Vendor's safety record?

This is your company's safety plan and how safety is handled while on the job site.

Submitted 3/30/2021 07:23:08 PM (CT)







Event Details Questions Activities Invitations Attachments Attributes Line Items Response Attachments Response Submission

Event Activities

 $H \leftarrow 1 \rightarrow H$

	Activity Date 🔺	Activity Time	Activity Type	Activity Name
			All ▼	
0,	3/12/2021	9:00 AM (CT)	Participation	1st Advertisement
0,	3/15/2021	9:00 AM (CT)	Participation	2nd Advertisement
0,	3/25/2021	10:00 AM (CT)	Participation	Pre-Proposal Meeting (Optional)
0,	3/25/2021	11:00 AM (CT)	Participation	RS MEANS Beginner Training (Optional)
0,	4/30/2021	2:00 PM (CT)	Participation	Proposal Closes
0,	7/21/2021	2:00 PM (CT)	Participation	Anticipated Board Award

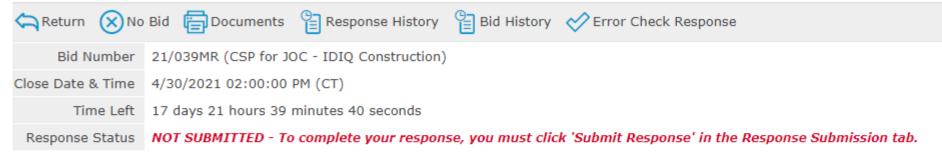


Edit Bid Response - 21/039MR

Questions

Activities

Invitations



Attachments

Bid Attachments

Event Details

# Download All File Name	Description
1 Download Lump Sum Estimate Example.pdf (410 KB)	Lump Sum Estimate Example.
2 Download 10.0 Attachment Packet (swl 1.23.2021).pdf (4.67 MB)	Section 10 Attachment.
3 Download CP Cooperative Member List _FEBRUARY Web 2021.pdf (228 KB)	Membership list as of February 2021.
4 Download 21039MR Job Order Contracting IDIQ.pdf (561 KB)	This is the complete CSP with instructions. Please read completely before asking questions.
Items 1-4 shown of 4	

Attributes

Line Items

Response Submission

Response Attachments



Edit blu Kespt	nise - 21/035	אויוכ						
Return No	Bid 🗐 Docum	nents	Response History	Bid History	Error Ch	eck Response		
Bid Number	21/039MR (CSP	for JOC - I	DIQ Construction)				
Close Date & Time	4/30/2021 02:0	00:00 PM (0	CT)					
Time Left	17 days 21 hour	rs 36 minut	tes 53 seconds					
Response Status	NOT SUBMITTE	D - To com	plete your respor	nse, you must clic	ck 'Submit Res	ponse' in the Re	sponse Submission tab.	
Event Details	Questions A	Activities	Invitations	Attachments	Attributes	Line Items	Response Attachments	Response Submission
Bid Attributes								
Save Save	e & Next 💛 Erro	or Check						
Attributes 1 - 30	shown of 79 • P	Page 1 of 3	3 shown					
# Attribute							Response	
 Company Name Please provide y 	our company name	<u>.</u>					Maximum 1000 characters	allowed
2 Company Street Please provide v	Address our company street	t address.					Maximum 1000 characters	allowed
3 Company City							Maximum 1000 characters	allowed
	ou company city.							
4 Company State Please provide y	our company state.						Maximum 1000 characters	allowed
5 Company Zip Co Please provide v	de our company zip co	ode.					Maximum 1000 characters	allowed
6 Company Phone							() Ext	International *
should be a page	te our company's web e that describes the es not within the aw	e products/s	ervices for which yo	ou were awarded th	ne contract - if y			



Event Details Questions Activities Invitations Attachments Attributes Line Items Response Attachments Response Submission

Bid Line Items

Place No Bid Lines Fror Check

Response Total: \$0.00

	IVE (X) NO BIG LINES & Error Check			Response	e lotal: \$0.00
#	Specification	Quantity	UOM	Response	Extended
1	Coefficient to be used with the RSMeans unit price book for Regular hours as defined in the CSP.	1	Percentage	Coefficient*	No Response
	Item Note: This is a not to exceed price. This one will be used with the RSMeans online data set. This shall be less than 1.0 to give our members best value.				Add Notes
2	Coefficient for RSMeans online - after hours and overtime hours	1	Percentage	Coefficient*	No Response
					Add Notes
3	Coefficient for National Construction Estimator book by Craftsman	1	Percentage	Coefficient*	No Response
	Item Note: This will be more than 1 and usually between 1.15 and 1.25				Add Notes
4	Coefficient for overtime hours for the National Construction Estimator book by Craftsman	1	Percentage	Coefficient*	No Response
	Item Note: This is normally over 1.25 but below 1.35				Add Notes
5	This is the coefficient to be used with the Sierra West Publishing UPB.	1	Percentage	Coefficient*	No Response
					Add Notes
6	Coefficient to be used with Xactimate UPB	1	Percentage	Coefficient*	No Response
					Add Notes
7	Usual and customary mark up for any non-pre-priced items that may come up. This is not a coefficient. It is a percent mark up of actual cost.	1	Percentage	Price	No Response
	Item Note: This is normally between 10 and 20%. For best value, we recommend 10%.			⊕ Add Alternate ⊗ No Bid	Add Notes



Eve	ent Details	Questions	Activities	Invitations	Attachments	Attributes	Line Items	Response Attachments	Response Submission
Regu	ested Atta	chments							
		iciiciico							
≪ F	rror Check								
#	Requested A								
1 *	Upload the o	Attachments completed, execu ad these items n			ned (ex: DocuSign)	or wet signature	documents. If we	et signature is used, the origin	als MUST be mailed or hand d
	Upload	Click "Upload	" to select file						
2 *	Form 1295 Upload your	certified, signed	l, and notarized	form here.					
	Upload	Click "Upload	" to select file						
3 *			ırance coverage	that meets the re	equirements as state	ed in section 5.4	4 of the CSP Docu	ment	
	Upload	Click "Upload	" to select file						
4	Company Lo Attach your	go company logo in	.JPG format						
	Upload		" to select file						
5		SBE etc. Certific		ations your compa	iny may hold				
	Upload		" to select file		•				
6 *			ntract with HCD	E/Choice Partners	s?				
	Upload		" to select file						
7 *		Safety Plan her	e.						
	Upload		" to select file						
8 *	Surety Lette	r show us your bo	nding capacity						
	Upload		" to select file						
9 *				your suggested o		ce estimating wi	th the line item es	stimates that you attached her	re. Not attaching an example (
	Upload		" to select file					,	
10 *		stance/Quality Coresponses to Qu		Program					
	Upload		" to select file						



							•	
Event Details	Questions	Activities	Invitations	Attachments	Attributes	Line Items	Response Attachments	Response Submission
Supplier Respo	nse Summai	ry						
Save								
Supplier Note to	o Buyer							
Supplier Notes								
Digital Signatur	re							
By submitting your	response, you	ertify that you	are authorized to	represent and bind	d your company			
* Your Full Name:				* Your Email Addr	ress:			

Submit Response



Edit Bid Response - 21/039MR



88 validation error(s) present. Please review the following tabs:



- Attributes
- Line Items
- · Response Attachments
- Response Submission

Event Details Questions Activities Invitations Attachments Attributes Line Items Response Attachments Response Submission

Supplier Response Summary

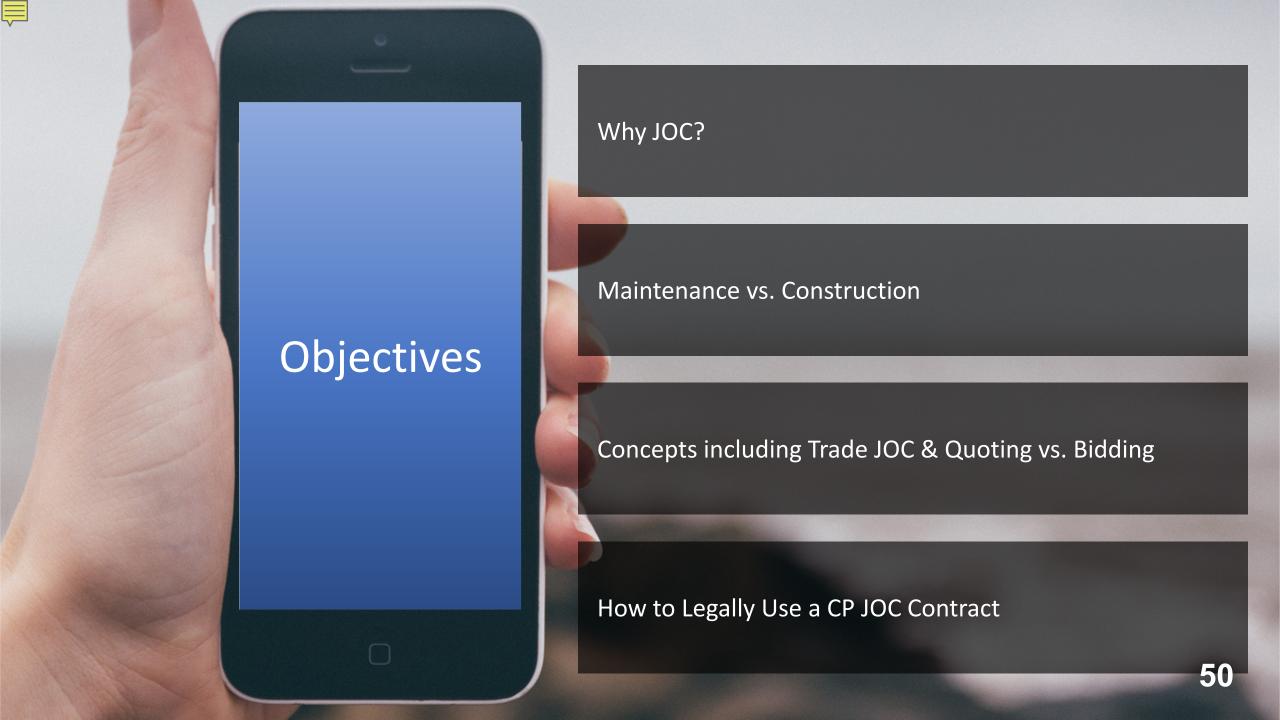


2 validation error(s) present

- . Digital Signature: You must enter the full name of the individual responding to this event
- · Digital Signature: You must enter the email address of the individual responding to this event



Job Order Contracting (JOC)





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 triggerbonding 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 <u>Texas Education Code 44.031</u>
 (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)



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	Exa	mple				
endor Na											
ob Descr											
Choice Pa	artners Contract #	18/036MC-XX									
Data Relea	ase : Year 2019 Qu	arter 2									
Quantity	LineNumber	Description	Unit	0&P	rotai	Fyt	Total O&P	Labor Type	Data Release	CCI Location	Notes
Luarrery		2000.1541011					Total Co.	Luber Type	Year 2019 Quarter	551 25541511	Insert any notes to
									2 (Use most		describe where work
									updated available		being done, what is
		Central station air handler, up thru 15 ton, selective							at time quote is		being provided in this
10	230505100400	demolition	Ea.	\$	579.25	\$	5.792.50	RR	requested)	TEXAS / HOUSTON (770-772)	line item, etc
		Rooftop air conditioner, single zone, electric cool,							, ,	,	,
		gas heat, 3 ton cooling, 60 MBH heating, includes,				l			Year 2019 Quarter		
1	237433101100	standard controls, curb and economizer	Ea.	\$	4.359.00	\$	4.359.00	RR	2	TEXAS / HOUSTON (770-772)	
		Rooftop air conditioner, single zone, electric cool,		Ť	.,	Ť	.,		_		
		gas heat, 7.5 ton cooling, 170 MBH heating,							Year 2019 Quarter		
3	237433101150	includes, standard controls, curb and economizer	Ea.	\$	8,213.65	\$	24.640.95	RR	2	TEXAS / HOUSTON (770-772)	
		Rooftop air conditioner, single zone, electric cool,		Ť	0,2.0.00	Ť			_		
		gas heat, 8.5 ton cooling, 170 MBH heating,							Year 2019 Quarter		
1	237433101156	includes, standard controls, curb and economizer	Ea.	\$	9,733.10	\$	9,733.10	RR	2	TEXAS / HOUSTON (770-772)	
		Rooftop air conditioner, single zone, electric cool,		Ť	-,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	<u> </u>	-,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		_		
		gas heat, 10 ton cooling, 200 MBH heating,							Year 2019 Quarter		
2	237433101160	includes, standard controls, curb and economizer	Ea.	\$	12,186.50	\$	24,373.00	RR	2	TEXAS / HOUSTON (770-772)	
		Rooftop air conditioner, single zone, electric cool,		· ·	, , , , , , , , , , , , , , , , , , , ,		, , , , , , , , , , , , , , , , , , , ,			,	
		gas heat, 12.5 ton cooling, 230 MBH heating,							Year 2019 Quarter		
1	237433101170	includes, standard controls, curb and economizer	Ea.	\$	13,614.90	\$	13,614.90	RR	2	TEXAS / HOUSTON (770-772)	
		Rooftop air conditioner, single zone, electric cool,								, , ,	
		gas heat, 15 ton cooling, 270 MBH heating,							Year 2019 Quarter		
2	237433101180	includes, standard controls, curb and economizer	Ea.	\$	16,839.60	\$	33,679.20	RR	2	TEXAS / HOUSTON (770-772)	
		Curbs/pads prefabricated, pad, condenser,									
		fiberglass reinforced concrete with polystyrene							Year 2019 Quarter		
100	239110106050	foam core, 2" thick, 20" x 38"	Ea.	\$	94.70	\$	9,470.00	RR	2	TEXAS / HOUSTON (770-772)	
		Rent crane truck mounted, hydraulic, 100 ton							Year 2019 Quarter		
1	015433602720	capacity, Incl. Hourly Oper. Cost.	Week	\$	9,898.76	\$	9,898.76	RR	2	TEXAS / HOUSTON (770-772)	
		RS Means Unit Cost Total		\$	75,519.46	\$	135,561.41				
	Insert what you bi	Total with Coefficient (1.0 x RS Means Total)				\$	135,561.41				
		Additional Discount of XX% good for current project									
		only				\$		***Optional if yo	u need to give additiona	discount to be competitive.	
		2% Bond (Any additional Pass-Through Costs)				\$	2,440.11				
		Total Project Quote				\$	124,445.37				
							•				



Review the JOC Quote

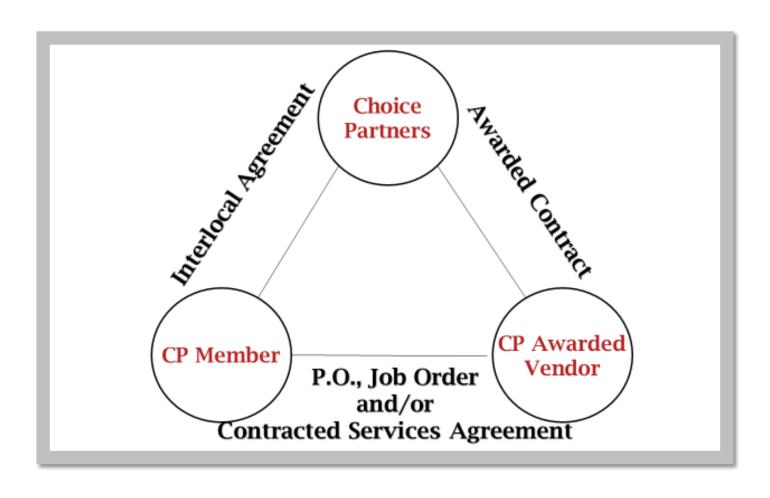
- CCI location
- Coefficient
- O & P Pricing
- Data release (most recent)

- Non pre-priced items
- Attempts to passthrough 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 <u>involving electrical or mechanical engineering</u> will cost <u>\$8,000 or less</u>
 - A project <u>not involving electrical or mechanical engineering</u> will cost **\$20,000 or less** (i.e., structural or civil)



What Must Go to the Board?

- Determination of construction services project delivery method (if other than Competitive Sealed Bids).
- 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.



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



THE FOREGOING PRESENTATION WAS CREATED BY HARRIS COUNTY DEPARTMENT OF EDUCATION. THIS PRESENTATION IS INTENDED TO BE USED SOLELY FOR GENERAL INFORMATION PURPOSES AND IS NOT TO BE REGARDED AS LEGAL ADVICE. IF SPECIFIC LEGAL ADVICE IS SOUGHT, PLEASE CONSULT AN ATTORNEY

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Q & A





Looking forward to working with you!





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PROSPECTIVE VENDOR WEBINAR

