

# REQUEST FOR LEGISLATIVE ACTION

Completed by County Counselor's Office:

Res/Ord No.: 19299

Sponsor(s): Greg Grounds

Date: October 31, 2016

SUBJECT	<p>Action Requested  <input checked="" type="checkbox"/> Resolution  <input type="checkbox"/> Ordinance</p> <p>Project/Title: <u>Awarding a Thirty-Two (32) Month Term and Supply Contract for the furnishing of HVAC Products, Installation, Services for Various County Departments to Johnson Controls of Milwaukee, WI; under the Terms and Conditions of General Services Administration (GSA) Contract No. GS-06F-0060P, a competitively bid contract.</u></p>																		
<p>BUDGET INFORMATION  <i>To be completed By Requesting Department and Finance</i></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Amount authorized by this legislation this fiscal year:</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Amount previously authorized this fiscal year:</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Total amount authorized after this legislative action:</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Amount budgeted for this item * (including transfers):</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Source of funding (name of fund) and account code number; FROM / TO</td> <td></td> </tr> </table> <p>* If account includes additional funds for other expenses, total budgeted in the account is: \$</p> <p>OTHER FINANCIAL INFORMATION:</p> <p><input type="checkbox"/> No budget impact (no fiscal note required)  <input checked="" type="checkbox"/> Term and Supply Contract (funds approved in the annual budget); estimated value and use of contract:</p> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse;"> <thead> <tr> <th>Department</th> <th>Estimated Use</th> </tr> </thead> <tbody> <tr> <td>Facilities Management</td> <td style="text-align: right;">\$100,000.00</td> </tr> <tr> <td>Parks + Rec Department</td> <td style="text-align: right;">\$ 10,000.00</td> </tr> <tr> <td><b>Total</b></td> <td style="text-align: right;"><b>\$110,000.00</b></td> </tr> </tbody> </table> <p>Prior Year Budget (if applicable):            Prior Year Actual Amount Spent (if applicable):</p>	Amount authorized by this legislation this fiscal year:	\$	Amount previously authorized this fiscal year:	\$	Total amount authorized after this legislative action:	\$	Amount budgeted for this item * (including transfers):	\$	Source of funding (name of fund) and account code number; FROM / TO		Department	Estimated Use	Facilities Management	\$100,000.00	Parks + Rec Department	\$ 10,000.00	<b>Total</b>	<b>\$110,000.00</b>
Amount authorized by this legislation this fiscal year:	\$																		
Amount previously authorized this fiscal year:	\$																		
Total amount authorized after this legislative action:	\$																		
Amount budgeted for this item * (including transfers):	\$																		
Source of funding (name of fund) and account code number; FROM / TO																			
Department	Estimated Use																		
Facilities Management	\$100,000.00																		
Parks + Rec Department	\$ 10,000.00																		
<b>Total</b>	<b>\$110,000.00</b>																		
PRIOR LEGISLATION	<p>Prior ordinances and (date):            Prior resolutions and (date):</p>																		
CONTACT INFORMATION	<p>RLA drafted by (name, title, &amp; phone): Jessica Johnson, Senior Buyer, 881-3265</p>																		
REQUEST SUMMARY	<p>Various County Departments require a Term and Supply Contract for Johnson Controls HVAC Products and Services in order to maintain the current Johnson Controls systems and provide equipment upgrades as necessary for satisfactory working climates.</p> <p>Pursuant to Section 1030.4 of the Jackson County Code, the Director of Finance and Purchasing recommends the award of a Thirty-Two (32) Month Term and Supply Contract for the furnishing of HVAC Products, Installation, Services to Johnson Controls of Milwaukee, WI, under the Terms and Conditions set forth in GSA Contract No. GS-06F-0060P, a competitively bid government contract.</p> <p>The Director of Finance and Purchasing recommends the purchase made under this contract due to higher volume discounts offered to larger government entities.</p> <p>This award is made on an "As Needed" basis and does not obligate Jackson County to pay any specific amount.</p>																		
CLEARANCE	<p><input type="checkbox"/> Tax Clearance Completed (Purchasing &amp; Department)N/A  <input type="checkbox"/> Business License Verified (Purchasing &amp; Department)N/A  <input checked="" type="checkbox"/> Chapter 6 Compliance - Affirmative Action/Prevailing Wage (County Auditor's Office)</p>																		

ATTACHMENTS	Memorandum from Joseph Tomlinson, Facilities Management Administrator, pertinent pages of GSA Contract	
REVIEW	Department Director: <i>Q. Tray Thomas / SPP</i>	Date: 10/17/2016
	Finance (Budget Approval): <i>If applicable</i> <i>[Signature]</i>	Date: 10/17/16
	Division Manager: <i>Marylou Brown</i>	Date: 10/27/16
	County Counselor's Office:	Date:

Fiscal Information (to be verified by Budget Office in Finance Department)

- This expenditure was included in the annual budget.
- Funds for this were encumbered from the \_\_\_\_\_ Fund in \_\_\_\_\_.
- There is a balance otherwise unencumbered to the credit of the appropriation to which the expenditure is chargeable and there is a cash balance otherwise unencumbered in the treasury to the credit of the fund from which payment is to be made each sufficient to provide for the obligation herein authorized.
- Funds sufficient for this expenditure will be/were appropriated by Ordinance # \_\_\_\_\_
- Funds sufficient for this appropriation are available from the source indicated below.

Account Number:	Account Title:	Amount Not to Exceed:

- This award is made on a need basis and does not obligate Jackson County to pay any specific amount. The availability of funds for specific purchases will, of necessity, be determined as each using agency places its order.
- This legislative action does not impact the County financially and does not require Finance/Budget approval.



## JACKSON COUNTY Facilities Management Division

Jackson County Courthouse  
415 East 12th Street, Third Floor Mezzanine  
Kansas City, Missouri 64106  
jacksongov.org

(816) 881-3258  
Fax: (816) 881-3583

### MEMORANDUM

**From:** Joseph Tomlinson, Facilities Management Administrator

**To:** Jessica Johnson, Senior Buyer, Purchasing Department

**Date:** 9/28/2016

**Subject:** Johnson Controls Term and Supply Proposal

Jessica,

This memorandum is being prepared and submitted in response to your request for evaluation and comment regarding the need for retaining Johnson Controls on a Term and Supply basis.

It is vital to the Facilities Management Division (FMD) that Johnson Controls be retained on a Term and Supply basis, due to the high level of use their proprietary systems within our building stock. Currently, the Downtown Courthouse's HVAC System is completely outfitted with Johnson Controls software, and its hardware is made up of mostly Johnson Controls products. The over 70 Air Handling Units require frequent preventative maintenance, and issues are discovered during these routine work that prompts the need for Johnson Controls to be summoned. Often, these expenses are higher than the non-contractual Jackson County threshold, and may occur on a more frequent basis.

FMD recommends they be awarded a minimum amount of \$100,000.00 for this contract on an annual basis.

Thank you for your consideration in this matter.

Joseph Tomlinson  
Facilities Management Administrator  
Jackson County, MO  
816.881.3748 (desk)  
816.217.9310 (mobile)



## GENERAL SERVICES ADMINISTRATION

### Schedule 03FAC Facilities Maintenance and Management

#### Federal Supply Service

#### Authorized Federal Supply Schedule Price List

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA Advantage!, a menu-driven database system. The Internet address for GSA Advantage! is: <https://www.GSAAdvantage.gov>

#### Johnson Controls, Inc.

507 E. Michigan Street  
Milwaukee, WI 53202

Phone: 1-800-727-6660

Fax: 1-240-683-7601

Email: [cg-gsa-schedules@jci.com](mailto:cg-gsa-schedules@jci.com)

Website: [www.johnsoncontrols.com](http://www.johnsoncontrols.com)

**Business Size:** Large

**Price list is effective as of Modification  
#PO-0013, 07/14/14**

For more information on ordering from  
Federal Supply Schedules, see:  
<http://www.gsa.gov/schedules>

**Contract Number:** GS-06F-0060P

**Contract Period:** 7/14/14 through 7/13/19

#### Special Item Numbers:

811 002 Complete Facilities Maintenance  
811 003 Complete Facilities Management  
811 005 Refrigeration, Heating, Ventilation, Air  
Conditioner, Boiler and Chiller HVAC Maintenance  
871 202 Energy Management Planning and  
Strategies  
871 203 Training on Energy Management  
871 204 Metering Services  
871 205 Energy Program Support Services  
871 206 Building Commissioning Services  
871 207 Energy Audit Services  
871 208 Resource Efficiency Management (REM)  
871 209 Innovations in Renewable Energy  
871 210 Water Conservation  
003 97 Ancillary Repair and Alterations

Johnson Controls offers products and  
services that optimize energy use and  
improve comfort and security.

Johnson Controls is a leading full-line  
service provider of mechanical equipment  
as well as systems that control heating,  
ventilation, air conditioning (HVAC),  
lighting, security and fire management in  
non-residential buildings. Services include  
complete mechanical and electrical  
maintenance. We are a world leader in  
integrated facility management for Fortune  
500 companies, managing more than one  
billion square feet worldwide.



**TABLE OF CONTENTS**

**CUSTOMER INFORMATION ..... 1**  
**SPECIAL IDENTIFICATION NUMBER (SIN) DESCRIPTIONS.....3**  
**INSTRUCTIONS FOR PLACING ORDERS FOR SERVICES BASED ON GSA SCHEDULE HOURLY RATES**  
**..... 7**  
**REQUIREMENTS EXCEEDING THE MAXIMUM ORDER.....8**  
**BLANKET PURCHASE AGREEMENTS (BPAs).....9**  
**LABOR CATEGORY DESCRIPTIONS ..... 14**  
**HOURLY RATES FOR SERVICES ..... Error! Bookmark not defined.**





## CUSTOMER INFORMATION

**1a. Special Item Number(s)**

- 811 002** Complete Facilities Maintenance
- 811 003** Complete Facilities Management
- 811 005** Refrigeration, Heating, Ventilation, Air Conditioner, Boiler and Chiller HVAC Maintenance
- 871 202** Energy Management Planning and Strategies
- 871 203** Training on Energy Management
- 871 204** Metering Services
- 871 205** Energy Program Support Services
- 871 206** Building Commissioning Services
- 871 207** Energy Audit Services
- 871 208** Resource Efficiency Management (REM)
- 871 209** Innovations in Renewable Energy
- 871 210** Water Conservation
- 003 97** Ancillary Repair and Alterations

Please refer to [page 3](#) for full SIN descriptions.

**1b. Lowest Priced Model Number per SIN:**

**1c. Labor Categories and Hourly Rates:**

Please refer to [page 14](#)

**2. Maximum Order Threshold:**

All SINs - \$1,000,000 per SIN

Please note this is not a GSA enforced limitation on the value of a task order (see I-FSS-125 Requirements Exceeding the Maximum Order (Sep. 1999))

**3. Minimum Order:**

\$100

**4. Geographic Coverage (delivery area)**

Worldwide

**5. Point(s) of Production:**

Not Applicable

**6. Discount from List Prices:**

Please contact Johnson Controls for pricing information

**7. Quantity Discounts:**

None

**8. Prompt Payment Terms:**

Net 30 Days

**9a. Government Purchase Cards are accepted at or below the micro-purchase threshold.**

**9b. Government Purchase Cards are accepted above the micro-purchase threshold.**

**10. Foreign Items:**

None

**11a. Time of Delivery:**

30 Days ARO

**11b. Expedited Delivery:**

Please contact Johnson Controls for assistance

**11c. Overnight and 2 Day Delivery:**

Please contact Johnson Controls for assistance

**11d. Urgent Requirements:**

Please contact Johnson Controls for assistance



**12. F.O.B. Point(s):**

Jobsite

**13a. Ordering Address:**

Johnson Controls, Inc.  
507 E. Michigan St.  
Milwaukee, WI USA 53201  
Phone: 1-800-727-6660  
Fax: 1-240-683-7601  
Email: [cg-gsa-schedules@jci.com](mailto:cg-gsa-schedules@jci.com)

**13b. Ordering Procedures:**

For supplies and services, the ordering procedures and information on establishing Blanket Purchase Agreements (BPAs) are found in Federal Acquisition Regulation (FAR) 8.405-3.

**14. Payment Address:**

Johnson Controls, Inc.  
507 E. Michigan St.  
Milwaukee, WI USA 53201

**15. Warranty provision.**

Not Applicable

**16. Export Packing Charges:**

Not applicable

**17. Terms and Conditions of Government Purchase Card Acceptance:**

Accepted, no discount.

**18. Terms and Conditions of Rental, Maintenance and Repair:**

Please contact Johnson Controls for assistance

**19. Terms and Conditions of Installation:**

Please contact Johnson Controls for assistance

**20. Terms and Conditions of Repair Parts:**

Please contact Johnson Controls for assistance

**20a. Terms and Conditions for any Other Services:**

Please contact Johnson Controls for assistance

**21. List of Service and Distribution Points:**

Please refer to [page 78](#) for a list of Johnson Controls area offices.

**22. List of Participating Dealers:**

Not Applicable

**23. Preventive Maintenance:**

Please contact Johnson Controls for assistance

**24a. Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants).**

Not Applicable

**24b. Section 508 Compliance Information:**

Not Applicable

**25. Data Universal Number System (DUNS) number:**

050516509

**26. Contractor is registered in the System for Award Management (SAM) (formerly CCR).**