

# REQUEST FOR LEGISLATIVE ACTION

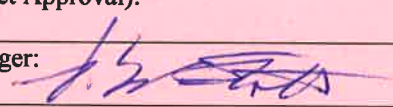
Completed by County Counselor's Office:

Res/~~Ord~~ No.: 19781

Sponsor(s): Dennis Waits

Date: March 19, 2018

<b>SUBJECT</b>	<p>Action Requested  <input checked="" type="checkbox"/> Resolution  <input type="checkbox"/> Ordinance</p> <p>Project/Title: <u>Awarding a Twenty-Four Month term and supply contract with Three Twelve Month Options to Extend, for the furnishing of HVAC Services to U.S. Engineering Company of Kansas City, MO under the terms and conditions of Invitation to Bid No. 98-17.</u></p>																																																								
<b>BUDGET INFORMATION</b> <i>To be completed By Requesting Department and Finance</i>	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>Amount authorized by this legislation this fiscal year:</td> <td></td> </tr> <tr> <td>Amount previously authorized this fiscal year:</td> <td></td> </tr> <tr> <td>Total amount authorized after this legislative action:</td> <td></td> </tr> <tr> <td>Amount budgeted for this item * (including transfers):</td> <td></td> </tr> <tr> <td>Source of funding (name of fund) and account code number:</td> <td></td> </tr> </table> <p>* If account includes additional funds for other expenses, total budgeted in the account is: \$</p> <p><b>OTHER FINANCIAL INFORMATION:</b></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 style="width:100%;"> <tr> <td style="width:40%;">Department:</td> <td>Estimated Use:</td> </tr> <tr> <td>Facilities Management</td> <td>\$25,000.00</td> </tr> <tr> <td>Public Works</td> <td>\$10,000.00</td> </tr> <tr> <td>Parks + Rec</td> <td><u>\$20,000.00</u></td> </tr> <tr> <td>Total</td> <td>\$55,000.00</td> </tr> </table> <p>This RLA only approves the term and supply contract. The funds were appropriated through the annual budget adoption. Figures included in the Budget Information section are for informational purposes to provide an estimate of the contract value.</p> <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:		Department:	Estimated Use:	Facilities Management	\$25,000.00	Public Works	\$10,000.00	Parks + Rec	<u>\$20,000.00</u>	Total	\$55,000.00																																				
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<b>PRIOR LEGISLATION</b>	<p>Prior ordinances and (date):          Prior resolutions and (date):</p>																																																								
<b>CONTACT INFORMATION</b>	<p>RLA drafted by (name, title, &amp; phone): Katie Bartle, Senior Buyer, 816-881-3465</p>																																																								
<b>REQUEST SUMMARY</b>	<p>Various County Departments require a Term and Supply Contract for the furnishing of HVAC Services. The Purchasing Department issued Invitation to Bid 98-17 in response to those requirements.</p> <p>A total of forty-nine notifications were distributed and five bids were received and evaluated as follows:</p> <table border="1" style="width:100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>NO</th> <th>Description</th> <th>U.S Engineering</th> <th>Rand Construction</th> <th>Fagan</th> <th>Design Mechanical</th> <th>Heartland Mechanical</th> </tr> </thead> <tbody> <tr> <td>1.0</td> <td>Regular Work Hours</td> <td>\$84.00</td> <td>\$95.00</td> <td>\$104.00</td> <td>\$102.00</td> <td>\$95.00</td> </tr> <tr> <td>2.0</td> <td>Overtime Work Hours</td> <td>\$120.75</td> <td>\$135.00</td> <td>\$135.00</td> <td>\$163.00</td> <td>\$142.50</td> </tr> <tr> <td>3.0</td> <td>Sunday and Holiday Work Hours</td> <td>\$120.75</td> <td>\$190.00</td> <td>\$164.00</td> <td>\$178.00</td> <td>\$190.00</td> </tr> <tr> <td></td> <td>Percentage Markup on</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>4.0</td> <td>Materials</td> <td>25%</td> <td>15%</td> <td>20%</td> <td>25%</td> <td>20%</td> </tr> <tr> <td></td> <td>Delivery Charge for</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>5.0</td> <td>Parts orders</td> <td>N/A</td> <td>\$45.00</td> <td>\$0</td> <td>\$0</td> <td>\$30.00</td> </tr> </tbody> </table>	NO	Description	U.S Engineering	Rand Construction	Fagan	Design Mechanical	Heartland Mechanical	1.0	Regular Work Hours	\$84.00	\$95.00	\$104.00	\$102.00	\$95.00	2.0	Overtime Work Hours	\$120.75	\$135.00	\$135.00	\$163.00	\$142.50	3.0	Sunday and Holiday Work Hours	\$120.75	\$190.00	\$164.00	\$178.00	\$190.00		Percentage Markup on						4.0	Materials	25%	15%	20%	25%	20%		Delivery Charge for						5.0	Parts orders	N/A	\$45.00	\$0	\$0	\$30.00
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	<p>The expected annual usage of the Facilities Management Division is \$25,000.00. However, they have requested to be able to use up to \$150,000.00 on this contract in case of emergency.</p> <p>Pursuant to Chapter 1054.6 of the Jackson County Code, the Department of Finance and Purchasing recommends the award of a Twenty-Four Month Term and Supply Contract with Three Twelve Month Options to Extend to U.S Engineering of Kansas City, MO for the furnishing of HVAC Services for use by Various County Departments.</p> <p>This award is made on an "as needed" basis and does not obligate Jackson County, Missouri to pay any specific amount. The availability of funds for specific purchases is subject to annual appropriation.</p>	
CLEARANCE	<input checked="" type="checkbox"/> Tax Clearance Completed (Purchasing & Department) <input checked="" type="checkbox"/> Business License Verified (Purchasing & Department) <input checked="" type="checkbox"/> Chapter 6 Compliance - Affirmative Action/Prevailing Wage (County Auditor's Office)	
COMPLIANCE	<input checked="" type="checkbox"/> MBE Goals, 5% <input checked="" type="checkbox"/> WBE Goals, 5% <input checked="" type="checkbox"/> VBE Goals, 5%	
ATTACHMENTS	Abstract of Bids, Award Recommendation from each department, and the pertinent pages of the vendor's bid documents.	
REVIEW	Department Director:	Date:
	Finance (Budget Approval): <i>If applicable</i>	Date:
	Division Manager: 	Date: 3/14/18
	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:** Katie Bartle, Senior Buyer, Purchasing Department

**Date:** 02/12/2018

**Subject:** ITB 98-17 HVAC Services, Term and Supply Contract

Katie,

This memorandum is being prepared and submitted in response to your request for feedback regarding the above contract being awarded by Jackson County for HVAC Services on a Term and Supply basis.

After considering factors and bids, the Facilities Management Division would like to recommend US Engineering, they possess the lowest bid rates out of the group of vendors.

Thank you for your consideration in this matter,

Sincerely,

A handwritten signature in black ink, appearing to read "Joseph Tomlinson".

Joseph Tomlinson  
Facilities Management Administrator  
816.881.3748 (desk)  
816.217.9310 (mobile)



Jackson County  
Public Works Department

ROAD MAINTENANCE 34900 E. Old US 40 Hwy, P.O. Box 160  
Grain Valley, Missouri 64029  
(816) 847-7050 *phone*  
(816) 847-7051 *fax*

MEMORANDUM

TO: Katie Bartle, Senior Buyer

FROM: Caroline Deihl, Public Works – Road Maintenance

DATE: February 5, 2018

SUBJECT: Bid No. 98-17 HVAC Services

Katie, We recommend that the bid be split between US Engineering & Rand Construction. We have used US Engineering for years and they are familiar with our equipment and building. We want Rand Construction as a backup because we use them currently for other things.

We will use approximately \$10,000.00.



## JACKSON COUNTY

### Parks + Rec.

22807 Woods Chapel Road  
Blue Springs, Missouri 64015  
www.jacksongov.org

*Administration  
Historic Sites  
Ranger Station  
Leisure Services  
(816) 503-4800  
Fax (816) 795-1234*

*Kemper Outdoor  
Education Center  
(816) 229-8980*

*Fred Arbanas  
Golf Course at  
Longview Lake  
(816) 761-9445*

*Blue Springs Marina  
(816) 795-1112*

*Jacomo Marina  
(816) 795-8888*

*Longview Marina  
(816) 966-0131*

*Special Population  
Services  
(816) 763-5130*

## MEMORANDUM

**TO:** Katie Bartle, Senior Buyer

**FROM:** Wayne Shipley, Park Supervisor

**DATE:** February 1, 2018

**SUBJECT:** Invitation to Bid No. 97-17 – **HVAC Services**

The Parks Department recommendation is to award to U.S. Engineering Company as the lowest and best bid.

Our **projected usage** during the next twelve months is \$20,000

003 – 1602 – 56510 - \$20,000

*Frank White Jr., County Executive*

NO	DESCRIPTION	UNIT	QTY	Design Mechanical Inc.	U.S. Engineering	Rand Construction	Fagan an EMCOR Co.	Heartland Mechanical Services
1.0	Regular Work Hours	Hour	1	\$ 103. <sup>00</sup>	\$ 84. <sup>00</sup>	\$ 95. <sup>00</sup>	\$ 104. <sup>00</sup>	\$ 95. <sup>00</sup>
2.0	Overtime Work Hours	Hour	1	\$ 163. <sup>00</sup>	\$ 120. <sup>75</sup>	\$ 135. <sup>00</sup>	\$ 135. <sup>00</sup>	\$ 142. <sup>50</sup>
3.0	Sunday and Holiday Hours	Hour	1	\$ 178. <sup>00</sup>	\$ 120. <sup>75</sup>	\$ 190. <sup>00</sup>	\$ 164. <sup>00</sup>	\$ 190. <sup>00</sup>
4.0	Percentage markup on materials			95 %	25 %	15 %	20 %	20 %
5.0	Delivery Charge for parts orders			\$ 0. <sup>00</sup>	N/A	\$ 45. <sup>00</sup>	\$ 0. <sup>00</sup>	\$ 30. <sup>00</sup>

CERTIFICATION OF BID OPENING  
 BIDS WERE PUBLICLY  
 OPENED AND RECORDED  
 ON: 1/23/2018 BY  
Veddi A. Bowland  
 CLERK OF THE LEGISLATURE  
  
 PURCHASING

**STATEMENT OF CONTRACTOR'S QUALIFICATIONS**

(Complete in full, Use attachments if necessary)

Name of Bidder: <b>U.S. Engineering Company</b>	
Address with Zip Code: <b>3433 Roanoke Road, Kansas City, MO 64111</b>	
Federal Tax I.D. Number: <b>44-00470840</b>	
Check One: Corporation <input checked="" type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/>	
If <b>SOLE PROPRIETORSHIP</b> , state name, address and phone number of owner:	
N/A	
<b>If CORPORATION:</b>	
Date of Incorporation: <b>2/12/1914</b>	Name of State(s) in which incorporated: <b>Missouri</b>
President's Name: <b>Tim Moormeier</b>	Vice-President's Name: <b>Clay Daniels</b>
Secretary's Name: <b>Bob Brunson</b>	Treasurer's Name: <b>Brendan Rittle</b>
<b>If PARTNERSHIP:</b>	
Is the Partnership: <input checked="" type="checkbox"/> General <input type="checkbox"/> Limited <input type="checkbox"/> Association <input type="checkbox"/> (Check one)	
Date of Organization:	
Name and addresses of all partners:	
1. N/A	
2.	
3.	
<b>GENERAL INFORMATION:</b>	
Percent of work to be done under the proposed contract by your own staff: <b>100%?</b>	
No. of Permanent Employees: <b>1112</b>	Geographical Limits of Operation: <b>KC Midwest Area</b>
No. of years in business: <b>125</b>	
Have you ever done business under a different name: Yes <input type="checkbox"/> <b>No</b> <input checked="" type="checkbox"/> (Check one)	
If Yes, give Name and Location:	
Has contractor ever withdrawn or defaulted on a contractual obligation: Yes <input type="checkbox"/> <b>No</b> <input checked="" type="checkbox"/> (Check one)	
If Yes, state where and why:	
See Attached Legal Statement	

**STATEMENT OF CONTRACTOR'S QUALIFICATIONS - Continued**

Has Contractor ever been sued for breach of any contract? Yes  **No**  (Check one)

If Yes, Explain:

See Attached Legal Statement

List Completed Contracts within the Past Three Years, Including Amount of Each:

See Attached

List of Current Contracts, Including Amount of Each:

See Attached

Please indicated how you intend to comply with the State of Missouri's Prevailing Wage Requirement:

We use 100% union contractors.

Customer Reference (state name, address, and phone number):

See Attached

List each subcontractor you plan to use if awarded the contract. If no, so state. **No**

SUBCONTRACTOR'S NAME & PHONE #	ITEM OF WORK	\$ AMOUNT OF CONTRACT	MBE/WBE

State any other relevant information concerning Contractor's history, credentials, responsibility and capabilities (If none, so state):

None

**DBE STATUS** Indicate status claimed:

- 1. Minority Owned Business (MBE) YES \_\_\_ NO X  
 African American \_\_\_ Latino \_\_\_ Native American \_\_\_ Asian \_\_\_ Pacific Islander \_\_\_
- 2. Woman Owned Business (WBE) YES \_\_\_ NO X
- 3. Small Business YES \_\_\_ NO X

For consideration as an MBE, WBE or Small Business, a copy of any governmental entity or Minority Supplier Council certification must be attached.

Prepared by (print or type): **Scott Elsey**

Title: **Project Manager**

Signature:



Date: **11/23/18**



## U.S. ENGINEERING COMPANY CURRENT MAJOR PROJECTS

OWNER	CM/GENERAL CONTRACTOR	PROJECT	LOCATION	PERCENT COMPLETE	CONTRACT	COMPLETE
Department of Homeland Security	McCarthy/Mortenson	NBAF Labs Phase	Manhattan, KS	19%	\$150,000,000	12/31/22
University of Kansas	Clark/McCownGordon JV	KU Central District Development Project	Lawrence, KS	79%	\$42,042,774	08/01/18
University of Colorado Health	GE Johnson	UCHealth Memorial North Expansion	Colorado Springs, CO	1%	\$17,733,000	04/01/19
Adams County	Saunders Construction	Human Services Building	Westminster, CO	98%	\$11,830,266	09/01/17
State of Wyoming	JE Dunn Construction	Wyoming State Capitol Renovation	Cheyenne, WY	37%	\$10,332,978	10/10/19
Leprino Foods	Whiting-Turner Contracting Company	Manufacturing Plant Expansion	Greeley, CO	74%	\$10,096,262	11/01/17
Ball Aerospace	Hensel Phelps Construction	Plant Expansion	Westminster, CO	5%	\$9,791,689	12/31/18
Presbyterian St. Luke's Hospital	Layton Construction	Central Plant Upgrades	Denver, CO	91%	\$9,366,858	07/31/17
The University of Kansas Hospital	JE Dunn Construction	Cambridge North Tower	Kansas City, KS	76%	\$8,456,772	12/01/17
University of North Colorado	Adolfson & Peterson	UNC Commons	Greeley, CO	9%	\$8,000,000	10/01/18





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**U.S. ENGINEERING COMPANY**

Mechanical Contractor Since 1893

3433 Roanoke Road  
Kansas City, MO 64111-3726  
[www.usengineering.com](http://www.usengineering.com)

Tel 816.753.6969  
Fax 816.931.5773

**References:**

Contact Name: Jim Williamson  
Business Name: Quintiles  
Address: 6700 W 115<sup>th</sup> Street  
Overland Park, KS 66206  
Phone: 913-708-6791  
Services Provided: General HVAC & Plumbing Service/  
Maintenance/ Repairs/ and Replacments

Contact Name: Erik Hanan  
Business Name: IKEA  
Address: 6000 IKEA Way  
Merriam, KS 66202  
Phone: 888-888-4532  
Services Provided: General HVAC & Plumbing Service/  
Maintenance/ Repairs/ and Replacments

Contact Name: Damon Bender  
Business Name: Coveris  
Address: 1701 Johnson Industrial Drive  
Excelsior Springs, MO 64024  
Phone: 816-630-6581  
Services Provided: General HVAC & Plumbing Service/  
Maintenance/ Repairs/ and Replacments

9.0 QUOTATION

9.1 Total Base Bid: The Undersigned Bidder hereby proposes to perform all work as outlined in the Specifications as necessary and incidental to the completion of HVAC Services as follows:

NO.	DESCRIPTION	PRICE PER HOUR
1.	Regular Work Hours, Hourly Rate, Monday - Friday, 8:00 a.m. - 5:00 p.m.	\$ 84.00
2.	Overtime Work Hours, Hourly Rate Outside of Regular Work Hours, and Saturdays	\$ 120.75
3.	Overtime Work Hours, Hourly Rate Sundays and Holidays, 8:00 a.m. - 5:00 p.m.	\$ 120.75
4.	Percentage markup on materials of net cost as reflected on supplier's invoices of parts, equipment, materials, and supplies and must include any and all delivery charges.	25 %
5.	Delivery Charge, if any, for parts orders	\$ N/A

**NOTE:** Percentage mark-up for parts, equipment, materials, and supplies furnished by the subcontractors of the successful contractor shall be paid by the county only once and directly to the successful contractor and shall not exceed the percentage quoted above. The County will not pay for rental to the successful contractor for equipment, parts and supplies that are customarily used in the operation of the Successful Contractor's business.

9.2 Hours of Service:

Indicate Normal Service Hours and Days available: Monday through Friday 8:00am through 4:30pm

Indicate After/Emergency Service Hours and Days available: 4:30pm to 8am, Monday PM through Friday AM  
 4:30pm through 8am, Monday and Holidays

Indicate name and phone number of the contact person who should receive service calls:

Name: Melissa Agne

Phone: 816-753-6980

SIGNATURE: 	DATE: <u>1/31/18</u>
NAME (PRINT): <u>Clay Daniels</u>	PHONE: <u>816-753-6969</u>
TITLE (PRINT): <u>V.P. of Service &amp; Solutions</u>	CELL:
COMPANY NAME (PRINT) <u>U.S. Engineering Company</u>	FAX: <u>816-931-5773</u>
E-MAIL ADDRESS (PRINT) <u>clay.daniels@usengineering.com</u>	
E-MAIL ADDRESS FOR PO'S (PRINT) <u>scott.elsey@usengineering.com</u>	
URL (PRINT): <u>www.usengineering.com</u>	