



Fulton County Board of Commissioners
Agenda Item Summary

18-1014

BOC Meeting Date
 12/19/2018

Requesting Agency

Real Estate and Asset Management

Commission Districts Affected

All Districts

Requested Action *(Identify appropriate Action or Motion, purpose, cost, timeframe, etc.)*

Request approval to renew existing contract- Department of Real Estate and Asset Management, 17ITB104627C-BKJ, HVAC Full Maintenance Services for Selected County Facilities in the amount of \$300,000.00 with Johnson Controls, Inc. (Roswell, GA), to provide full service maintenance and repair to major HVAC mechanical systems and equipment for the eight (8) selected County facilities. This action exercises the first of two renewal options. One renewal option remains. Effective dates: January 1, 2019 through December 31, 2019.

Requirement for Board Action *(Cite specific Board policy, statute or code requirement)*

In accordance with Purchasing Code Section 102-394(6), the Purchasing Department shall present all renewal requests to the Board of Commissioners at least 90 days prior to the contract renewal date or 60 days if the contract term is six (6) months or less.

Is this Item related to a Strategic Priority Area? *(If yes, note strategic priority area below)*

Yes All People trust government is efficient, effective, and fiscally sound

Is this a purchasing item?

Yes

Summary & Background

(First sentence includes Agency recommendation. Provide an executive summary of the action that gives an overview of the relevant details for the item.)

Scope of Work: This service contract furnishing all materials, parts, labor, tools, equipment and appurtenances necessary to provide full periodic maintenance services and repairs to various types of major HVAC mechanical systems and equipment for the eight (8) selected Fulton County facilities.

The scope of work also includes but not limited to:

- Perform all original manufacturer's specified quarterly, semi-annual, and annual maintenance and diagnostics.
- Maintenance of all OEM control devices and components according to manufacturer to include all: safety devices; sensors; electronic circuits and drives; mechanicals/electrical drives, dampers and actuators components; and software maintenance.
- Maintenance, repair, and/or replacement as OEM specified, including but not limited to: belts, couplings, sheaves, pulleys and shafts; motors & starters, VFD and components; compressors; condensers; and evaporators refrigerant piping, manifolds, expansion valves, chilled water exchangers.

Agency Director Approval		County Manager's Approval
Typed Name and Title Felicia Strong-Whitaker, Director	Phone (404) 612-5800	
Signature	Date	

Revised 03/12/09 (Previous versions are obsolete)

- Maintenance, repair, and/or replacement as OEM Components of chillers, chill water and hot water pumps, terminal boxes, package units, split-systems, air handlers units, coolers, freezers and exhaust fans necessary for the equipment to operate according to manufacturer's standards.

Selected County facilities:

- Darnell Senior Multi-Purpose Center
- North Service Center
- Dorothy C. Benson Senior Multi-Purpose Center
- HJC Bowden Senior Multi-Purpose Center
- Helene S. Mills Senior Multi-Purpose Center
- College Park Health Clinic
- Aviation Cultural Center
- Oak Hill Child, Family and Adolescent Center

Community Impact: Maintaining major HVAC mechanical systems and equipment in reliable working condition and will ensure air quality and comfort for the community members and employees in the selected County facilities.

Department Recommendation: The Department of Real Estate and Asset Management recommends approval to renew existing contract to furnishing all materials, parts, labor, tools, equipment and appurtenances necessary to provide full periodic maintenance services and repairs to various types of major HVAC mechanical systems and equipment for the eight (8) selected Fulton County facilities for fiscal year 2019.

This contract is a time and materials periodic service contract that requires covering the cost for replacement parts/components and laboring for maintenance repairs.

Project Implications: This contract requires professional licenses, specialty tools, equipment, training and technician skills to perform periodic service to various types of major HVAC mechanical systems and equipment for the eight (8) selected County facilities.

Community Issues/Concerns: None that the Department is aware of.

Department Issues/Concerns: If this contract renewal is not approved, the County cannot provide full periodic maintenance services and repairs to various types of major HVAC mechanical systems and equipment for the selected Fulton County facilities.

History of BOC Agenda Item:

CURRENT CONTRACT HISTORY	BOC ITEM	DATE	DOLLAR AMOUNT
Original Contract Amount	17-0957	11/15/17	\$496,800.00
1st Renewal			\$300,000.00
Total Revised Amount			\$796,800.00

Continued

Contract Compliance Information*(Provide Contractor and Subcontractor details.)*

Contract Value: \$300,000.00
Prime Vendor: Johnson Controls, Inc.
Prime Status: Non-Minority
Location: Roswell, GA
County: Fulton County
Prime Value: \$300,000.00 or 100.00%

Total Contract Value: \$300,000 or 100.00%
Total M/FBE Value: \$-0-

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Solicitation Information	NON-MFBE	MBE	FBE	TOTAL
No. Bid Notices Sent:				
No. Bids Received:				

Total Contract Value	\$300,000.00 or 100.00%
Total M/FBE Values	\$-0-
Total Prime Value	\$300,000.00 or 100.00%

Fiscal Impact / Funding Source *(Include projected cost, approved budget amount and account number, source of funds, and any future funding requirements.)*
 100-520-5220-1116: General, Real Estate and Asset Management, Building Maintenance- \$233,000
 500-520-5200-F014: Capital, Real Estate and Asset Management, Major HVAC Repairs- \$67,000
 "Subject to availability of funding adopted for FY2019 by BOC"

Exhibits Attached *(Provide copies of originals, number exhibits consecutively, and label all exhibits in the upper right corner.)*

- Exhibit 1:** Contract Renewal Agreement
- Exhibit 2:** Contract Renewal Evaluation Form
- Exhibit 3:** Contractor's Performance Report

Source of Additional Information *(Type Name, Title, Agency and Phone)*
 Ellis G. Kirby, LEED AP, CEM, CEFP, Deputy Chief Operation Officer, Infrastructure, (404) 612-5919

Agency Director Approval		County Manager's Approval
Typed Name and Title Felicia Strong-Whitaker, Director	Phone (404) 612-5800	
Signature	Date	

Revised 03/12/09 (Previous versions are obsolete)

Procurement			
Contract Attached: Yes	Previous Contracts: Yes		
Solicitation Number: 17ITB104627C-BKJ	Submitting Agency: Department of Real Estate and Asset Management	Staff Contact: Harry Jordan	Contact Phone: (404) 612-5933
Description: Approval to renewal existing contract to provide HVAC full maintenance services for selected Fulton County facilities.			
FINANCIAL SUMMARY			
Total Contract Value:		MBE/FBE Participation:	
Original Approved Amount:	\$496,800.00	Amount: .	%: .
Previous Adjustments:	.	Amount: .	%: .
This Request:	\$300,000.00	Amount: \$0	0.00%: .
TOTAL:	\$796,800.00	Amount: .	%: .
Grant Information Summary:			
Amount Requested: .	<input type="checkbox"/>	Cash	
Match Required: .	<input type="checkbox"/>	In-Kind	
Start Date: .	<input type="checkbox"/>	Approval to Award	
End Date: .	<input type="checkbox"/>	Apply & Accept	
Match Account \$: .			
Funding Line 1: 100-520-5220-1116: \$233,000.00 "Subject to availability for funding adopted for FY2019 by BOC"	Funding Line 2: 500-520-5200-F014: \$67,000.00 "Subject to availability for funding adopted for FY2019 by BOC"	Funding Line 3: .	Funding Line 4: .
KEY CONTRACT TERMS			
Start Date: 1/1/2019	End Date: 12/31/2019		
Cost Adjustment: .	Renewal/Extension Terms: One renewal options remains.		
ROUTING & APPROVALS (Do not edit below this line)			
X	Originating Department:	Kirby, Ellis	Date: 11/14/2018
X	County Attorney:	Stewart, Derval	Date: 12/8/2018
X	Purchasing/Contract Compliance:	Strong-Whitaker, Felicia	Date: 12/10/2018
X	Finance/Budget Analyst/Grants Admin:	Whitted, Ivan	Date: 11/14/2018
.	Grants Management:	.	Date: .
X	County Manager:	Anderson, Dick	Date: 12/10/2018



DEPARTMENT OF PURCHASING & CONTRACT COMPLIANCE

Fulton County, GA

CONTRACT RENEWAL AGREEMENT

BOC DATE:

BOC NUMBER:

DEPARTMENT: Real Estate and Asset Management

BID/RFP# NUMBER: 17ITB104627C-BKJ

BID/RFP# TITLE: HVAC Full Maintenance Services for Selected County Facilities

ORIGINAL APPROVAL DATE: 11/15/2017

RENEWAL PERIOD: FROM: 1/1/2019 THROUGH 12/31/2019

RENEWAL OPTION #: 1 OF 2

NUMBER OF RENEWAL OPTIONS: 2

RENEWAL AMOUNT: \$300,000.00

COMPANY'S NAME: Johnson Controls, Inc.

ADDRESS: 1350 Northmeadow Parkway, Suite 100

CITY: Roswell

STATE: Georgia

ZIP: 30076

This Renewal Agreement No. ____ was approved by the Fulton County Board of Commissioners on BOC DATE: BOC NUMBER:

SIGNATURES: SEE NEXT PAGE

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SIGNATURES:

Vendor agrees to accept the renewal option and abide by the terms and conditions set forth in the contract and specifications for Bid/RFP# 17ITB104627C-BKJ

(Person signing must have signature authority for the company/corporation)

NAME: _____ **(Print)**
(CEO, President, Vice President)

VENDOR'S SIGNATURE: _____ **DATE** _____

ATTEST:

NOTARY PUBLIC: _____

TITLE: _____ **COUNTY:** _____

SEAL (Affix) **MY COMMISSION EXPIRES:** _____

FULTON COUNTY, GEORGIA

ROBERT L. PITTS, CHAIRMAN
BOARD OF COMMISSIONERS **DATE:** _____

ATTEST:

JESSE A. HARRIS
CLERK TO THE COMMISSION **DATE:** _____

SEAL (Affix)

DEPARTMENT AUTHORIZES RENEWAL OPTION ON THE AFOREMENTIONED BID/RFP:

DEPARTMENT HEAD: Ellis G. Kirby, LEED AP, CEM, CAFP, Director **(Print)**

DEPARTMENT HEAD SIGNATURE: _____ **DATE** _____

ITEM#: _____ **RCS:** _____ **ITEM#:** _____ **RM:** _____
RECESS MEETING **REGULAR MEETING**

Contract Renewal Evaluation Form

Date:	June 22, 2018
Department:	Real Estate and Asset Management
Contract Number:	17ITB104627C-BKJ
Contract Title:	HVAC Full Maintenance Services for Selected County Facilities

Instructions:

It is extremely important that every contract be rigidly scrutinized to determine if the contract provides the County with value. Each renewal shall be reviewed and answers provided to determine whether services should be maintained, services/scope reduced, services brought in-house or if the contract should be terminated. Please submit a completed copy of this form with all renewal requests.

1. Describe what efforts were made to reduce the scope and cost of this contract.

The scope of work for this contract cannot be reduced because requires professional licenses, specialty tools, equipment, training and technical skills to perform periodic services to various types of major HVAC mechanical system and equipment. The County is in the process of addressing the multiple upgrades of HVAC systems for repair/replacement in County facilities that was identified from the condition assessment due to deferred maintenance and the age of the units. This service contract furnishing all materials, parts, labor, tools, equipment and appurtenances necessary to provide full service maintenance and repair to major HVAC mechanical systems and equipment for selected Fulton County facilities: Darnell, Dorothy C. Benson, HJC Bowden and Helene S. Mills Senior Multi-Purpose Centers, North Service Center, College Park Health Clinic, Southwest Art Center, Aviation Cultural Center and the Oak Hill Child, Family and Adolescent Center.

2. Describe the analysis you made to determine if the current prices for this good or service is reflective of the current market. Check all applicable statements and provide documentation:

Internet search of pricing for same product or service:

Date of search:	Click here to enter a date.
Price found:	Click here to enter text.
Different features / Conditions:	Click here to enter text.
Percent difference between internet price and renewal price:	Click here to enter text.

Explanation / Notes:

The prices for HVAC Maintenance do reflect the current market. This procurement was conducted in accordance with all applicable provisions of the Fulton County Code of Ordinances and the specific method of source selection for the services required in this bid is code Selection 102-373, Competitive Sealed Bid.

Market Survey of other jurisdictions:

Date contacted:	Click here to enter a date.
Jurisdiction Name / Contact name:	Click here to enter text.
Date of last purchase:	Click here to enter a date.
Price paid:	Click here to enter text.
Inflation rate:	Click here to enter text.
Adjusted price:	Click here to enter text.
Percent difference between past purchase price and renewal price:	Click here to enter text.
Are they aware of any new vendors?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Are they aware of a reduction in pricing in this industry?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
How does pricing compare to Fulton County's award contract?	Hourly rates applicable for Fulton County contract is \$65 which is less than price applicable for City of Atlanta contract.

Explanation / Notes:

Click here to enter text.

Other (Describe in detail the analysis conducted and the outcome):

Click here to enter text.

3. **What was the actual expenditure (from the AMS system) spent for this contract for previous fiscal year?**

There's no past expenditure history, this service commenced in FY2018.

4. **Does the renewal option include an adjustment for inflation?** Yes No
(Information can be obtained from CPI index)

Was it part of the initial contract? Yes No

Date of last purchase:	Click here to enter a date.
Price paid:	Click here to enter text.
Inflation rate:	Click here to enter text.
Adjusted price:	Click here to enter text.
Percent difference between past purchase price and renewal price:	Click here to enter text.

Explanation / Notes:

Click here to enter text.

5. Is this a seasonal item or service? Yes No

6. Has an analysis been conducted to determine if this service can be performed in-house? Yes No If yes, attach the analysis.

This service is required as an augmentation of capacity and is used when the capabilities and availability of in-house resources are not sufficient to meet the maintenance requirements. This service requires professional licenses, specialty tools, equipment, training and technical skills to perform periodic services to various types of major HVAC mechanical system and equipment. Therefore, cannot be performed in-house because the DREAM does not have enough qualified and experienced technicians necessary to perform this kind of work.

7. What would be the impact on your department if this contract was not approved?

If this contract is not approved, there will be a significant delay or failure in the repair and replacement of HVAC equipment in County owned facilities. This will result in hazardous building environments for employees and tax payers who use the buildings.

Charles Lyons, Building Maintenance Manager *C.L.*

Dexter Dyer, Trades Manager *[Signature]*

Prepared by

3 July 2019
Date

Ellis Kirby, Director
[Signature]
Department Head *AK ER*

Click here to enter a date.
3 July 18
Date

DEPARTMENT OF PURCHASING & CONTRACT COMPLIANCE

CONTRACTORS PERFORMANCE REPORT
OTHER SERVICES

Report Period Start	Report Period End	Contract Period Start	Contract Period End
4/1/2018	7/31/2018	1/1/2018	12/31/2018
PO Number			PO Date
120-020918*200			2/12/2018
Department	Real Estate and Asset Management		
Item Number	17ITB104627C-BKJ		
Service Commodity	HVAC Full Service Maintenance for Selected County Facilities		
Contractor	Johnson Controls Incorporated		

= Unsatisfactory	<i>Achieves contract requirements less than 50% of the time, not responsive, effective and/or efficient, unacceptable delay, incompetence, high degree of customer dissatisfaction.</i>
= Poor	<i>Achieves contract requirements 70% of the time. Marginally responsive, effective and/or efficient; delays require significant adjustments to programs; key employees marginally capable; customers somewhat satisfied.</i>
= Satisfactory	<i>Achieves contract requirements 80% of the time; generally responsive, effective and/or efficient; delays are excusable and/or results in minor programs adjustments; employees are capable and satisfactorily providing service without intervention; customers indicate satisfaction.</i>
= Good	<i>Achieves contract requirements 90% of the time. Usually responsive; effective and/or efficient; delays have not impact on programs/mission; key employees are highly competent and seldom require guidance; customers are highly satisfied.</i>
= Excellent	<i>Achieves contract requirements 100% of the time. Immediately responsive; highly efficient and/or effective; no delays; key employees are experts and require minimal directions; customers expectations are exceeded.</i>

Quality of Goods/Services (-Specification Compliance - Technical Excellence - Reports/Administration - Personnel Qualification)

Comments:

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During this review period Johnson Controls Inc. (JCI), had a 40% improvement on their work plan requirements. This was evidenced by JCI not executing the scope of work outlined in the full maintenance contract until the second quarter of the year. In fact, they met only 70% of the requirements. It's my experience that JCI has some competent technicians who perform their work at a satisfactory level but their submission of paperwork is lackluster at best.

Timeliness of Performance (-Were Milestones Met Per Contract - Response Time (per agreement, if applicable) - Responsiveness to Direction/Change - On Time Completion Per Contract)

Comments:

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JCI on a whole have met key milestones per the contract 70% of the time and have proved to be tardy in the first quarter of the year at best. Some examples of unmet key milestones are previously approved work plans that were not executed in a timely manner. After a scheduled meeting with JCI back in April 2018 to review and confirm expectations going forward to avoid missed deadlines and failure to complete work plans, we have noticed an improvement in JCI's performance since the last review and they are continually improving.

Business Relations (-Responsiveness to Inquiries - Prompt Problem Notifications)

Comments:

0

1

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ices will be sent out by their Accounts Payable Department on a quarterly schedule following a Purchase Order execution. When an
into any discrepancies the Account Executive communicated that JCI managers wanted to conduct weekly meetings to reconcile any
their behalf.

4

Customer Satisfaction (-Met User Quality Expectations - Met Specification - Within Budget - Proper Invoicing - No Substitutions)

0

Comments:

Overall, JCI completed their contractual agreement although there were some initial concerns; the arranged meeting appears to have improved JCI's performance in areas where we initially experienced less than acceptable performance. Again, JCI's technicians displayed a high level of professionalism and often went out their way to ensure that DREAM and the end users were completely satisfied.

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Contractors Key Personnel (-Credentials/Experience Appropriate - Effective Supervision/Management - Available as Needed)

0

Comments:

JCI's key technicians continued to demonstrate a high degree of experience and expertise in this review period. Although in the beginning phase of the maintenance agreement, JCI's management performed at a level inconsistent with Fulton County's expectations which resulted in a 2-month delay starting the preventive maintenance. JCI has since revamped their Project Management team and are quickly back on a fast track to completing their contractual agreements.

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Overall Performance Rating: 2.6

Would you select/recommend this vendor again?
(check box for Yes. Leave Blank for No)

Yes No

Rating completed by:

Dexter Dyer

Department Head Name

Department Head Signature

Date

ELUIS G. KIRBY

[Handwritten Signature]
FOR EK

8/1/2018