



BOARD OF SUPERVISORS AGENDA ITEM REPORT AWARDS / CONTRACTS / GRANTS

☐ Award ☒ Contract ☐ Grant

Requested Board Meeting Date: 12/7/21

* = Mandatory, information must be provided

or Procurement Director Award: ☐

***Contractor/Vendor Name/Grantor (DBA):**

Kone Inc.

***Project Title/Description:**

Job Order Master Agreement: Elevator Modernization Design and Contracting Services

***Purpose:**

Amendment of Award: Master Agreement No. MA-PO-18-244, Amendment No. Four (4). This amendment adds the full annual award amount of \$1,000,000.00 within the current annual renewal term with one renewal remaining, increases the annual renewal amount from \$1,000,000.00 to \$3,000,000.00 for a cumulative not-to-exceed amount of \$3,000,000.00 and increases the maximum individual job order threshold from \$1,000,000.00 to \$1,500,000.00 to accommodate current and upcoming Elevator Modernization Job Order projects. Administering Department: Facilities Management.

This is an indefinite delivery/indefinite quantity job order master agreement. For all projects, selection will be based on the responses to a quotation covering either cost or cost and schedule from all Job Order Contractors. No individual Job Order may exceed \$1,500,000.00, including change orders.

***Procurement Method:**

Pursuant to Solicitation for Qualifications No. 281873, on 03/06/18, the Board of Supervisors awarded a master agreement for these services in the amount of \$1,000,000.00 for an agreement term of 03/06/18 to 03/05/19.

Amendment No. One (1) was approved by the Procurement Director on 01/14/19 to extend the term of the agreement to 03/05/20 with no funds required at the time.

Amendment No. Two (2) was approved by the Procurement Director on 02/24/20 to extend the term of the agreement to 03/05/21, implement a revised amendment notification process for a more efficient way to effect future renewals, extensions, revisions, update language in Articles 1 and 32, and add the annual award amount of \$1,000,000.00 for a cumulative not-to-exceed amount of \$2,000,000.00.

Amendment No. Three (3) was approved by the Procurement Director on 03/04/21 to extend the term of the agreement to 03/05/22 with no funds required at the time.

Attachment: Amendment No. Four (4) and Memorandum

***Program Goals/Predicted Outcomes:**

Contract with elevator modernization teams that can provide design, engineering, construction and maintenance on Pima County's elevators.

***Public Benefit:**

Aging elevators in a variety of Pima County facilities will be updated to meet current life safety and elevator codes.

***Metrics Available to Measure Performance:**

DD Form 2626 will be utilized to evaluate contractors performance in accordance with Pima County Board of Supervisors Policy D 29.1.

***Retroactive:**

No.

TO: COB 11-23-21 (1)
pgs: 2
Vers: 5

23-11 '21 PM01:21

THE APPLICABLE SECTION(S) BELOW MUST BE COMPLETED

Click or tap the boxes to enter text. If not applicable, indicate "N/A". Make sure to complete mandatory (*) fields

Contract / Award Information

Document Type: _____ Department Code: _____ Contract Number (i.e., 15-123): _____
 Commencement Date: _____ Termination Date: _____ Prior Contract Number (Synergen/CMS): _____
☐ Expense Amount \$ _____ * ☐ Revenue Amount: \$ _____

***Funding Source(s) required:** _____

Funding from General Fund? ☐ Yes ☐ No If Yes \$ _____ % _____

Contract is fully or partially funded with Federal Funds? ☐ Yes ☐ No

If Yes, is the Contract to a vendor or subrecipient? _____

Were insurance or indemnity clauses modified? ☐ Yes ☐ No

If Yes, attach Risk's approval.

Vendor is using a Social Security Number? ☐ Yes ☐ No

If Yes, attach the required form per Administrative Procedure 22-10.

Amendment / Revised Award Information

Document Type: MA Department Code: PO Contract Number (i.e., 15-123): 18-244
 Amendment No.: 4 AMS Version No.: 5
 Commencement Date: 12/7/21 New Termination Date: _____
 Prior Contract No. (Synergen/CMS): _____

☒ Expense ☐ Revenue ☒ Increase ☐ Decrease

Amount This Amendment: \$ 1,000,000.00

Is there revenue included? ☐ Yes ☒ No If Yes \$ _____

***Funding Source(s) required:** Various Funds

Funding from General Fund? ☐ Yes ☒ No If Yes \$ _____ % _____

Grant/Amendment Information (for grants acceptance and awards)

☐ Award ☒ Amendment

Document Type: _____ Department Code: _____ Grant Number (i.e., 15-123): _____
 Commencement Date: _____ Termination Date: _____ Amendment Number: _____
☐ Match Amount: \$ _____ ☐ Revenue Amount: \$ _____

***All Funding Source(s) required:** _____

*Match funding from General Fund? ☐ Yes ☐ No If Yes \$ _____ % _____

*Match funding from other sources? ☐ Yes ☐ No If Yes \$ _____ % _____

*Funding Source: _____

*If Federal funds are received, is funding coming directly from the Federal government or passed through other organization(s)?

Contact: James Johnson Digitally signed by James Johnson
Date: 2021.11.16 08:41:07-07:00

Division Manager: Scott Loomis Digitally signed by Scott Loomis
Date: 2021.11.17 15:26:24 -07:00

Department: Procurement Director: Terri Spencer Digitally signed by Terri Spencer
Date: 2021.11.17 16:11:34 -07:00 Telephone: 520-724-7465

Department Director Signature: _____ Date: 11/18/2021

Deputy County Administrator Signature: _____ Date: 11/18/2021

County Administrator Signature: _____ Date: 11/18/2021

MEMORANDUM

DATE: November 2, 2021

TO: Terri Spencer, Procurement Director

FROM: Lisa Josker, Facilities Management Director 

SUBJECT: Elevator Modernization Design & Contracting Services Job Order Master Agreement Increase


The Job Order Master Agreement (JOMA) for Elevator Modernization Design & Contracting services was awarded in March 2018 using a competitive process to a single qualified contractor, Kone, Inc. The award was for an annual shared amount not to exceed \$1M, with a single job maximum not to exceed \$1M for an initial one-year term with up to four (4) one-year extensions. Three (3) one-year extensions have subsequently been awarded.

A current award for two of the four cabs in the 130 W Congress building is \$904,260. To allow for continuous elevator access in the building, the other two cabs were scheduled to be modernized in the next award year; however, with material cost escalations the estimate could be more than a million by the March 2022 extension. We recommend an increase to the annual JOC award limit to \$3M, with a single job maximum of \$1.5M, so that materials for the second job can be awarded prior to extension to minimize potential cost increases.

Upcoming elevator modernization projects in Facilities Management's Integrated Infrastructure Plan submission include multiple projects at the following locations to begin in FY 2025 for 32 N Stone Ave., in FY 2026 for 150 W Congress, and in FY 2027 at 110 W Congress. We anticipate resoliciting the Elevator Modernization Design & Contracting Services agreement prior to initiating those projects.

LJ:TT

cc: Scott Loomis, Division Manager Design & Construction, Procurement

Approved:


11-2-2021

PIMA COUNTY FACILITIES MANAGEMENT DEPARTMENT

PROJECT: Job Master Agreement: Elevator Modernization Design and Contracting Services

CONTRACTOR: Kone Inc.
4639 South 36th Street
Phoenix, Arizona 85040

MASTER AGREEMENT NO.: MA-PO-18-244

AMENDMENT NO.: Four (4)

FUNDING: Various Funds

| | | | |
|--|----------------------------------|----|--------------|
| CONTRACT TERM: 03/06/18 - 03/05/19 | ORIGINAL CONTRACT AMOUNT: | \$ | 1,000,000.00 |
| TERMINATION PRIOR AMENDMENT: 03/05/22 | PRIOR AMENDMENT(S): | \$ | 1,000,000.00 |
| TERMINATION THIS AMENDMENT: 03/05/22 | AMOUNT THIS AMENDMENT: | \$ | 1,000,000.00 |
| | REVISED CONTRACT AMOUNT: | \$ | 3,000,000.00 |

MASTER AGREEMENT AMENDMENT

WHEREAS, COUNTY and CONTRACTOR entered into a Master Agreement (Agreement) for services, as referenced above; and

WHEREAS, COUNTY has an increased need for job order elevator modernization design and contracting services; and

WHEREAS, ARTICLE 1 – BASIC TERMS, RENEWALS, EXTENSIONS AND REVISIONS allows COUNTY to unilaterally add funding to the Agreement; and

WHEREAS, COUNTY intends to add the full annual award amount within the current annual renewal term; and

WHEREAS, COUNTY intends to increase the annual award amount and the maximum individual job order thresholds to accommodate current and upcoming elevator modernization projects.

NOW, THEREFORE, it is agreed as follows:

1. This Amendment adds the full annual award amount of \$1,000,000.00 within the current annual renewal term and increases the annual award amount from \$1,000,000.00 to \$3,000,000.00 for a cumulative not-to-exceed amount of \$3,000,000.00.
2. **CHANGE:** ARTICLE 1 – BASIC TERMS, RENEWALS, EXTENSIONS AND REVISIONS, Paragraph 4 as follows:

FROM: "No individual Job Order may exceed \$1,000,000.00."

TO: "No individual Job Order may exceed \$1,500,000.00."
3. **CHANGE:** EXHIBIT "C" ARTICLE 1 – OVERVIEW AND DEFINITIONS, Paragraph 2 as follows:

FROM: "The Contract price for each Job Order shall not exceed \$1,000,000.00, including any Change Orders."

TO: "The Contract price for each Job Order shall not exceed \$1,500,000.00, including any Change Orders."

All other provisions of the Contract, not specifically changed by this Amendment, shall remain in effect and be binding upon the Parties.

IN WITNESS THEREOF, the Parties have affixed their signatures to this Amendment on the dates written below.

APPROVED:

Chairman, Board of Supervisors

Date

ATTEST:

Clerk of the Board

Date

APPROVED AS TO FORM:



Deputy County Attorney

Stacey Roseberry

Name (Please Print)

11/19/2021

Date

CONTRACTOR:


Signature

Name and Title (Please Print)

11/23/2021

Date: