

Staff Summary Report



Council Meeting Date: 11-06-2008

Agenda Item Number: _____

SUBJECT: Request to award one-year contracts with four, one-year renewal options to Caltrol, Inc. and Hennesy Equipment Sales Company for the purchase, repair, and maintenance of actuators used by the Water Utilities Department for water production and wastewater treatment services.

DOCUMENT NAME: 20081106fst03 **PURCHASES (1004-01)**

SUPPORTING DOCS: Yes

COMMENTS: (RFP #08-170) Total cost for these contracts shall not exceed \$75,000 during the initial contract period.

PREPARED BY: Ted Stallings, CPPB, Procurement Officer, 480-350-8617

REVIEWED BY: Michael Greene, CPM, Central Services Administrator, 480-350-8516
Don Hawkes, Water Utilities Manager, 480-350-2660

**LEGAL REVIEW AS
TO CONTRACT FORM**

ONLY: N/A

FISCAL NOTE: Sufficient funds have been appropriated in 3013, 3014 and 3034.

RECOMMENDATION: Award the contracts.

ADDITIONAL INFO: Request for Proposal 08-170 was issued to establish contracts to provide for the purchase, maintenance, and repair of actuators used in water production and wastewater treatment services. A total of two responses were received. An evaluation committee comprised of Water Utilities and Procurement staff reviewed the proposals. It is the recommendation of the committee to award contracts to Caltrol, Inc. and Hennesy Equipment Sales Company, the overall high scorers as follows:

Caltrol, Inc. – Price sheet items 6 and 7 (purchase of actuators and parts).

Hennesy Equipment Sales Company – Price sheet items 1 through 9 (purchase of actuators and parts, as well as maintenance and repair services).

Vendor's Proposal Offer

It is REQUIRED that Proposal Offeror COMPLETE, SIGN and SUBMIT the original of this form to the City Procurement Office with the proposal response offer. An unsigned "Vendor's Proposal Offer", late proposal response and/or a materially incomplete response will be considered non-responsive and rejected.

Proposal offeror is to type or legibly write in ink all information required below.

Proposal Offeror's Company Name	Caltrol, Inc.		
Company Mailing Address	8270 S. Kyrene Road, Suite 113		
Company Street Address	Tempe, AZ 85284		
Proposal Offeror Contact	Shari Hurley	Title	Area Manager
Contact's Phone No.	602-432-3637	E-mail Address	Shari_Hurley@caltrol.com
Proposal Offeror's Company Tax Information:			
Arizona Transaction Privilege (Sales) Tax No.	07345447-G	or	
Arizona Use Tax No.	_____		
Federal I.D. No.	95-3926313	_____	
City & State Where Sales Tax is Paid	Tempe	_____	AZ

THIS PROPOSAL IS OFFERED BY

Authorized Proposal Offeror (Type or Print in ink) Shari Hurley

Proposal Offeror's Title (Type of Print in ink) Area Manager

Date May 27, 2008

REQUIRED SIGNATURE OF AUTHORIZED PROPOSAL OFFEROR (Must Sign in Ink)

By signing this Proposal Offer, Offeror acknowledges acceptance of all terms and conditions contained herein and that prices offered were independently developed without consultation with any other offeror or potential offeror. Failure to sign and return this form with proposal offer will result in a non-responsive proposal.

Shari Hurley
Signature of Authorized Proposal Offeror

5-27-08
Date

Form 201-B (RFP)
(H/RFP 3-2002)

Company Name: Caltrol, Inc.

PRICE SHEET

ITEM NO.	DESCRIPTION OF REQUIRED MATERIAL, SERVICE OR CONSTRUCTION	QTY	UNIT	UNIT PRICE
1.	Labor Rate (Straight Time) During Normal Work hours 7:00am to 4:00pm (Monday – Friday) – Rate all inclusive of personnel, shop supplies, travel, equipment, mobilization, fuel, etc.	1	Hour	\$ <u>95.00</u> *
2.	Shop Labor Rate (Straight Time) During Normal Work hours 7:00am to 4:00pm (Monday – Friday) – Rate all inclusive of personnel, shop supplies, travel, equipment, mobilization, fuel, etc.	1	Hour	\$ <u>80.00</u> *
3.	Labor Overtime Rate (Night, Weekends, City Holidays) – Rate all inclusive of personnel, shop supplies, travel, equipment, mobilization, fuel, etc.	1	Hour	\$ <u>142.50</u> *
4.	Shop Labor Overtime Rate (Night, Weekends, City Holidays) – Rate all inclusive of personnel, shop supplies, travel, equipment, mobilization, fuel, etc.	1	Hour	\$ <u>120.00</u> *
				Total
5.	Equipment Rental – Markup percentage above cost. Must provide copy of rental invoice to verify markup.	15	%	
6.	Specify percentage off list price for Actuator parts for each manufacturer listed below.			Catalog Name/Number and Date
	• AUMA (Buyout)	Cost (+)20%		_____
		(-)10%	Modular Parts	_____
	• Limitorque (Caltrol is the representative)	List=Net %	Standard Parts	_____
	• Rotork (Buyout)	Cost (+)20%		_____
	• Keystone (Buyout)	Cost (+)20%		_____
	• EIM (Buyout)	Cost (+)20%		_____

Company Name: Caltrol, Inc.

PRICE SHEET

ITEM NO.	DESCRIPTION OF REQUIRED MATERIAL, SERVICE OR CONSTRUCTION	QTY	UNIT	UNIT PRICE
7.	Specify percentage off list price for purchase of new Actuator for each manufacturer listed below.			Catalog Name/Number and Date
	• AUMA (Buyout)	Cost (+)20 %		_____
		(-)10%		on MX and L120
	• Limitorque (Caltrol is the representative)	List = Net %		_____
				on SMB and HBC Gearboxes
	• Rotork (Buyout)	Cost (+)20 %		_____
	• Keystone (Buyout)	Cost (+)20 %		_____
	• EIM (Buyout)	Cost (+)20 %		_____

8. Discount off published list price for additional Actuators Manufactures equipment, parts, and supplies. Please add additional pages for multiple discounts.

Please provide manufacturer's name and percentage discount.

- _____ %
- _____ %
- _____ %
- _____ %
- _____ %
- _____ %
- _____ %
- _____ %

9. Other Costs/Fees Associated with may apply to the attached Scope of Work

_____	\$
_____	\$
_____	\$
_____	\$
_____	\$
_____	\$
_____	\$

Vendor's Proposal Offer

It is REQUIRED that Proposal Offeror COMPLETE, SIGN and SUBMIT the original of this form to the City Procurement Office with the proposal response offer. An unsigned "Vendor's Proposal Offer", late proposal response and/or a materially incomplete response will be considered non-responsive and rejected.

Proposal offeror is to type or legibly write in ink all information required below.

Proposal Offeror's Company Name	<u>HENNESY EQUIPMENT SALES CO.</u>		
Company Mailing Address	<u>4346 NORTH 7TH AVENUE, PHOENIX, ARIZONA 85013-2903</u>		
Company Street Address	<u>SAME AS ABOVE</u>		
Proposal Offeror Contact	<u>MIKE HAMMON</u>	Title	<u>SALES REPRESENTATIVE</u>
Contact's Phone No.	<u>602-277-7268</u>	E-mail Address	<u>mikeh@hennesyequipment.com</u>
Proposal Offeror's Company Tax Information:			
Arizona Transaction Privilege (Sales) Tax No.	<u>07-0499822</u>	or	
Arizona Use Tax No.	_____		
Federal I.D. No.	<u>86-0141180</u>		
City & State Where Sales Tax is Paid	<u>PHOENIX</u>	,	<u>AZ</u>

THIS PROPOSAL IS OFFERED BY

Authorized Proposal Offeror (Type or Print in ink) HENNESY EQUIPMENT SALES CO., MIKE HAMMON

Proposal Offeror's Title (Type of Print in ink) MIKE HAMMON, SALES REPRESENTATIVE

Date 5-28-08

REQUIRED SIGNATURE OF AUTHORIZED PROPOSAL OFFEROR (Must Sign in Ink)

By signing this Proposal Offer, Offeror acknowledges acceptance of all terms and conditions contained herein and that prices offered were independently developed without consultation with any other offeror or potential offeror. Failure to sign and return this form with proposal offer will result in a non-responsive proposal.

Mike B. Hammon
Signature of Authorized Proposal Offeror

5-28-08
Date

Form 201-B (RFP)
(H/RFP 3-2002)

Company Name: _____

PRICE SHEET

ITEM NO.	DESCRIPTION OF REQUIRED MATERIAL, SERVICE OR CONSTRUCTION	QTY	UNIT	UNIT PRICE
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|----|--|---|------|---------------|
| 1. | Labor Rate (Straight Time) During Normal Work hours
7:00am to 4:00pm (Monday – Friday) – Rate all inclusive of personnel, shop supplies, travel, equipment, mobilization, fuel, etc. | 1 | Hour | \$ <u>105</u> |
| 2. | Shop Labor Rate (Straight Time) During Normal Work hours
7:00am to 4:00pm (Monday – Friday) – Rate all inclusive of personnel, shop supplies, travel, equipment, mobilization, fuel, etc. | 1 | Hour | \$ <u>95</u> |
| 3. | Labor Overtime Rate (Night, Weekends, City Holidays) –
Rate all inclusive of personnel, shop supplies, travel, equipment, mobilization, fuel, etc. | 1 | Hour | \$ <u>155</u> |
| 4. | Shop Labor Overtime Rate (Night, Weekends, City Holidays) –
Rate all inclusive of personnel, shop supplies, travel, equipment, mobilization, fuel, etc. | 1 | Hour | \$ <u>140</u> |

Total

- | | | | | |
|----|---|-------------|--|--|
| 5. | Equipment Rental – Markup percentage above cost.
Must provide copy of rental invoice to verify markup. | <u>15</u> % | | |
|----|---|-------------|--|--|

- | | | | | |
|----|--|--|--|--|
| 6. | Specify percentage off list price for Actuator parts for each manufacturer listed below. | | | |
|----|--|--|--|--|

		Catalog Name/Number and Date	
• AUMA	<u>10</u> %	<u>WE ARE REP</u>	
• Limitorque	___ %	<u>NA NOT REP</u>	
• Rotork	___ %	<u>NA NOT REP</u>	
• Keystone	___ %	<u>NA NOT REP</u>	
• EIM	___ %	<u>NA NOT REP</u>	

Company Name: _____

PRICE SHEET

ITEM NO.	DESCRIPTION OF REQUIRED MATERIAL, SERVICE OR CONSTRUCTION	QTY	UNIT	UNIT PRICE
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7. Specify percentage off list price for purchase of new Actuator for each manufacturer listed below.

Catalog Name/Number and Date

• AUMA	10 %	REPRESENTATIVE
• Limitorque	_____ %	NA
• Rotork	_____ %	NA
• Keystone	_____ %	NA
• EIM	_____ %	NA

8. Discount off published list price for additional Actuators Manufactures equipment, parts, and supplies. Please add additional pages for multiple discounts.

Please provide manufacturer's name and percentage discount.

• DEWIK	10%
• CRISPIN	10%
• RODNEY HUNT	10%
• _____	_____ %
• _____	_____ %
• _____	_____ %
• _____	_____ %
• _____	_____ %

9. Other Costs/Fees Associated with may apply to the attached Scope of Work

FUEL SURCHARGE	\$ 50.00 / TRIP
_____	\$
_____	\$
_____	\$
_____	\$
_____	\$
_____	\$
_____	\$