



AGENDA ITEM REPORT

DATE: March 19, 2024
DEPARTMENT: Procurement Management
REQUESTER: Mary Tucker
TITLE: Award Annual Contract for Plumbing, HVAC, and Electrical Engineering Services

I. MOTION REQUESTED

- A) Award Competitive Negotiation Request for Proposal No. CN230600JJB, Plumbing, HVAC, and Electrical Engineering Services - Annual to BCER Engineering, Inc., Diversified Technology Consultants, Inc., Engineers and Associates, LLC, Matern Professional Engineering, Inc., McKim & Creed, Inc., and TLC Engineering Solutions, Inc., for plumbing, HVAC, and electrical engineering services, on an as-needed basis, for an initial term of three years, as approved in the departments' annual adopted budgets. Individual projects over \$100,000.00 will be presented to the Board for approval.
- B) Authorize the Chair to execute the contract documents on behalf of the Board of County Commissioners.
- C) Grant the County Manager or designee the authority to renew the contracts, for up to two additional years, and to execute all associated documents, as approved in the departments' annual adopted budgets, if doing so is in the best interest of Lee County, and there are no cost increases associated with the renewal(s).

II. ITEM SUMMARY

Awards annual plumbing, HVAC, and electrical professional services contracts from a competitive solicitation process to six firms. The scope of services includes design, construction drawings (AutoCAD), construction specifications, permitting, bidding and negotiation services, construction observation/administration, energy management program evaluations, conceptual estimates for new construction and renovation/retrofit projects, analysis of existing systems, as-built drawings (AutoCAD drawing), and performance of eleventh-month warranty inspections.

The services will be used on an as-needed basis, for an initial term of three years with the option to renew the contracts up to two additional years.

Total expenditures for these services for Fiscal Year 2022-2023 were \$141,392.50. Contracts used primarily by the Facilities Management department.

The awarded firms are: BCER Engineering, Inc., Diversified Technology Consultants, Inc., Engineers and Associates, LLC, Matern Professional Engineering, Inc., McKim & Creed, Inc., and TLC Engineering Solutions, Inc.

III. BACKGROUND AND IMPLICATIONS OF ACTION

- A) Board Action and Other History
 Procurement Management advertised a solicitation for Plumbing, HVAC, and Electrical Engineering Services on 09/12/2023, with all proposals due by 2:30 PM on 10/13/2023. At the time of opening, 88 proposals had been received.

 Evaluation Meeting 1 was held on 11/01/2023, and the Evaluation Committee members discussed all proposals received. Firms were scored and the most qualified firms were shortlisted for Presentation/ Interviews in Evaluation Meeting 2. The Committee short-listed 6 out of the 8 firms.

 Evaluation Meeting 2 was held on 11/17/2023. The Committee saw presentations and interviewed each firm that was shortlisted. After all presentations and interviews, the Committee then discussed the firms, and a motion was made to award to all 6 firms.
- B) Policy Issues
- C) BoCC Goals
- D) Analysis
- E) Options

IV. FINANCIAL INFORMATION

A)	Current year dollar amount of item:	See Comments below.
----	-------------------------------------	---------------------

B)	Is this item approved in the current budget?	Yes
C)	Is this a revenue or expense item?	Expense
D)	Is this Discretionary or Mandatory?	Discretionary
E)	Will this item impact future budgets? If yes, please include reasons in III(D) above.	
F)	Fund: Various department funds Program: Project: Account Strings:	
G)	Fund Type?	Other: Various funds
H)	Comments: Expenditures will be on an as-needed basis. Funding will be transferred to appropriate accounts when required and is not included in the annual adopted budget.	

V. RECOMMENDATION

Approve

VI. TIMING/IMPLEMENTATION

VII. FOLLOW UP

ATTACHMENTS:

Description	Upload Date	Type
CN230600JJB BCER Vendor Executed Agreement OCR	2/22/2024	Agreement
CN230600JJB DTC Vendor Executed Agreement OCR	2/22/2024	Agreement
CN230600JJB Engineers and Assoc Vendor Executed Agreement OCR	2/22/2024	Agreement
CN230600JJB Matern Prof Eng Vendor Executed Agreement OCR	2/22/2024	Agreement
CN230600JJB McKim Creed Vendor Executed Agreement OCR	2/28/2024	Agreement
CN230600JJB TLC Vendor Executed Agreement OCR	2/28/2024	Agreement

REVIEWERS:

Department	Reviewer	Action	Date
Procurement Management	Tucker, Mary	Approved	3/8/2024 - 11:00 AM
Budget Services	Henkel, Anne	Approved	3/8/2024 - 12:18 PM
Budget Services	Winton, Peter	Approved	3/8/2024 - 2:20 PM
County Attorney	Holborn , Robert	Approved	3/11/2024 - 10:04 AM
County Manager	Winton, Peter	Approved	3/11/2024 - 10:47 AM