



AGENDA ITEM REPORT

DATE: May 16, 2023
DEPARTMENT: Facilities Construction and Management
REQUESTER: Ehab Guirguis
TITLE: Approve Piggyback for the Purchase of HVAC Products, Installation and Services

I. MOTION REQUESTED

- A) Approve Piggyback No. PB230265CMR to utilize pricing on the Racine County, WI/ Omnia Partners Contract No. 3341. for HVAC Products, Installation, Labor Based Solutions and Related Product and Services with Trane Inc., for the purchase of Trane products, installation, and services on an as-needed basis, through the contract expiration date of August 31, 2027, and any renewals or extensions approved by Racine County, WI, as approved in the departments' annual adopted budgets. Individual purchases in excess of \$100,000.00 will be brought to the Board for approval.
- B) Grant the County Manager or designee the authority to renew the contract(s), 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).
- C) Authorize the Chair to execute the contract documents on behalf of the Board of County Commissioners.

II. ITEM SUMMARY

Approves a piggyback for the purchase of Trane products, installation, and services on an as-needed basis, and as approved in the departments' annual adopted budgets. Individual purchases in excess of \$100,000.00 will be brought to the Board for approval, at which point a market analysis will be completed on the items being purchased. The contract will provide for certified products and technicians for repairs and services at multiple Trane equipment locations across the County. Anticipated spend for upcoming year is \$200,000.00.

III. BACKGROUND AND IMPLICATIONS OF ACTION

A) Board Action and Other History

On September 21, 2021, the Board of the County Commissioners approved Piggyback No. PB210237NAT for HVAC Products, Installation, and Services, with Trane as the vendor, through Omnia Partners Cooperative Purchasing Collective. This piggyback expired on March 31, 2023.

Facilities Construction and Management provided a Request to Initiate a new piggyback to Procurement Management. The piggyback requested is through Omnia Partners and serves as a replacement for the solicitation and contract that expired on March 31, 2023. Procurement Management reviewed all solicitation and contract documents to verify the contract was an appropriate use of a piggyback. Due diligence and reviews successfully proved this to be an appropriate use of a piggyback.

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.	No
F)	Fund: Various Program: Project: Account Strings: Various – will vary depending on the needs of the departments	

G)	Fund Type?	Other: Various Operating and Major Maintenance Funds
H)	Comments: Individual purchases in excess of \$100,000.00 will be brought to the Board for approval.	

V. RECOMMENDATION

Approve

VI. TIMING/IMPLEMENTATION

On as needed basis.

VII. FOLLOW UP

ATTACHMENTS:

Description	Upload Date	Type
Signature Authorization	5/8/2023	Cover Memo

REVIEWERS:

Department	Reviewer	Action	Date
Facilities Construction and Management	Tucker, Mary	Approved	5/5/2023 - 1:24 PM
Facilities Construction and Management	Guirguis, Ehab	Approved	5/8/2023 - 5:58 AM
Budget Services	Guttery, Angela	Approved	5/8/2023 - 9:12 AM
Budget Services	Winton, Peter	Approved	5/8/2023 - 9:15 AM
County Attorney	Lira, Louis C.	Approved	5/8/2023 - 1:05 PM
County Manager	Codie, Robert	Approved	5/8/2023 - 4:25 PM