

Agenda Item Summary

1. ACTION REQUESTED/PURPOSE: Approve Change Order No. 5 to Kone, Inc. under RFQ-03-02 ELEVATOR MAINTENANCE AND MODERNIZATION SERVICES for the addition of the Admin. East Building maintenance in the amount of \$4448.76 each per year for three (3) passenger elevators and authorize contract renewal for an additional (1) year period. Also, approval of an additional one (1) year renewal period for various county facilities.

2. WHAT ACTION ACCOMPLISHES: Provides Lee County with elevator maintenance at various locations in Lee County.

3. MANAGEMENT RECOMMENDATION: Approval recommended.

4. Departmental Category: 02 CZA		5. Meeting Date: NOV 28 2006
6. Agenda: <input checked="" type="checkbox"/> Consent <input type="checkbox"/> Administrative <input type="checkbox"/> Appeals <input type="checkbox"/> Public <input type="checkbox"/> Walk-On	7. Requirement/Purpose: (specify)	
	Statute	
	Ordinance	
	<input checked="" type="checkbox"/> Admin. Code AC-4-4	
		8. Request Initiated: Commissioner Department Construction & Design Division Facilities Management By: Rich Beck, Director <i>RB</i>

9. Background:
 On July 8, 2003, the Board approved award under RFQ-03-02 ELEVATOR MAINTENANCE AND MODERNIZATION SERVICES to Kone, Inc., for a contract period of three (3) years.

It is requested that authorization be granted to extend this contract for an additional one-year period with the option to renew for an additional one-year period.

Funds are available in the following account: QC5121200100.503190

Attachments: Two (2) Change Orders for Execution

10. Review for Scheduling:

Department Director	Purchasing or Contracts	Human Resources	Other	County Attorney	Budget Services				County Manager/P.W. Director
					Analyst	Risk	Grants	Mgr.	
<i>Jamudu 11.8.06</i>	<i>[Signature]</i>	N/A		<i>11/9/06 Bacon 11/9/06</i>	<i>11/9/06</i>	<i>11/9/06</i>	<i>11/9/06</i>	<i>11/9/06</i>	<i>Jamudu 11.8.06</i>

11. Commission Action:

- Approved
- Deferred
- Denied
- Other

RECEIVED BY
 COUNTY ADMIN *CA*
 11/9/06
 4:10 - nwp.
 COUNTY ADMIN *CA*
 FORWARDED TO: *11*
 11-13-06
 11AM

Rec. by CoAtty
 Date: 11/9/06
 Time: 1:26 pm
 Forwarded to:
 CAD 2:20 pm

LEE COUNTY PROFESSIONAL SERVICE/SERVICE PROVIDER AGREEMENT
CHANGE ORDER/SUPPLEMENTAL TASK AUTHORIZATION

X Change Order
 Supplemental Task Authorization

NO.: 5

(A Change Order or Supplemental Task Authorization Requires Approval by the Department Director for Expenditures Under \$25,000 or Approval by the County Manager for Expenditures Between \$25,000 and \$50,000 or Approval by the Board of County Commissioners for Expenditures over \$50,000)

CONTRACT/PROJECT NAME: ELEVATOR MAINTENANCE AND MODERNIZATION SERVICES / CONTRACT RENEWAL AND ADDITION OF LEE COUNTY ADMIN. EAST BUILDING

CONSULTANT: Kone, Inc. PROJECT NO.:

SOLICIT NO.: RFQ-03-02 CONTRACT NO.: 2591 ACCOUNT NO.: _____

REQUESTED BY: COUNTY DATE OF REQUEST: 10/27/06

Upon the completion and execution of this Change Order or Supplemental Task Authorization by both parties the Consultant/Provider is authorized to and shall proceed with the following:

- EXHIBIT "CO/STA-A: SCOPE OF PROFESSIONAL SERVICE: DATED: 10/27/06
- EXHIBIT "CO/STA-B: COMPENSATION & METHOD OF PAYMENT: DATED: 10/27/06
- EXHIBIT "CO/STA-C: TIME AND SCHEDULE OF PERFORMANCE: DATED: 10/27/06
- EXHIBIT "CO/STA-D: CONSULTANT'S/PROVIDERS ASSOCIATED SUB-CONSULTANT(S)/SUB-CONTRACTORS: DATED: 10/27/06
- EXHIBIT "CO/STA-E: PROJECT GUIDELINES AND CRITERIA: DATED: 10/27/06

It is understood and agreed that the acceptance of this modification by the CONSULTANT/PROVIDER constitutes an accord and satisfaction.

RECOMMENDED:

By: _____
Department Director Date

By: [Signature] 11/8/06
Contracts Mgmt Date

APPROVED:

By: _____
*County Attorney's Office Date

*County Attorney signature needed for over Board level expenditures only.

CMO:023:09/25/01

ACCEPTED:

By: [Signature]
Consultant/Provider
(Print Name) Kenneth C. Ward
KONE Inc.

Date Accepted: 11/07/2006

Corporate Seal

COUNTY APPROVAL:

By: [Signature]
Department Director
(Print Name) Rich Beck
(Under \$25,000)

Date Approved: 11-8-07

By: _____
County Manager (Between
(\$25,000 and under \$50,000)
Date Approved: _____

By: _____
Chairman
Board of County Commissioners
Date Approved: _____

X CHANGE ORDER AGREEMENT No. 5
or
 SUPPLEMENTAL TASK AUTHORIZATION No. _____

EXHIBIT "CO/STA-A"

Date: 10/27/06

SCOPE OF PROFESSIONAL SERVICES

for RFQ-03-02 ELEVATOR MAINTENANCE AND MODERNIZATION SERVICES

SECTION 1.00 CHANGE(S) TO PROFESSIONAL SERVICES

The "Scope of Professional Services" as set forth in Exhibit "A" of the Professional Services Agreement, or Service Provider Agreement, referred to hereinbefore is hereby supplemented, changed or authorized, so that the CONSULTANT or SERVICE PROVIDER, shall provide and perform the following professional services, tasks, or work as a supplement to, change to, or authorized to, the scope of services previously agreed to and authorized:

- Renew Contract 2591 with Kone, Inc. for an additional one-year period with the option to add one (1) more one-year renewal.
- Add the Lee County Admin. Building East to contract.

*Attach additional pages, if needed.

X CHANGE ORDER AGREEMENT No. 5
 or
 SUPPLEMENTAL TASK AUTHORIZATION No.

EXHIBIT "CO/STA-B"

Date: 10/27/06

COMPENSATION AND METHOD OF PAYMENT

for RFQ-03-02 ELEVATOR MAINTENANCE AND MODERNIZATION SERVICES

SECTION 1.00 CHANGE(S) IN COMPENSATION

The compensation the CONSULTANT, or SERVICE PROVIDER, shall be entitled to receive for providing and performing the supplemented, changed or authorized services, tasks, or work as set forth and enumerated in the Scope of Services set forth in this CHANGE ORDER OR SUPPLEMENTAL TASK AUTHORIZATION AGREEMENT, Exhibit "CO/STA-A", attached hereto shall be as follows:

NOTE: A Lump Sum (L.S.) or Not-to-Exceed (N.T.E.) amount of compensation to be paid the CONSULTANT should be established and set forth below for each task or sub-task described and authorized in Exhibit "S/COA-A". In accordance with Professional Services Agreement Article 5.03(2) "Method of Payment", tasks to be paid on a Work-in-Progress payment basis should be identified (WIPP).

Task Number	Task Title	Amount of Compensation	Indicate Basis of Compensation LS or NTE	If Applicable Indicate (W.I.P.P.)
	Maintenance Renewal on various Lee County Facilities plus the addition of Passenger Elevators #1, #2 and #3 at Admin. Building East @ \$4448.76/Yr. Each			
TOTAL				

(Unless list is continued on next page)

X CHANGE ORDER AGREEMENT No. 5

or
 SUPPLEMENTAL TASK AUTHORIZATION No. _____

SECTION 2.00 SUMMARY OF CHANGE(S) IN COMPENSATION

Pursuant to and in consideration of the change(s) in the Scope of Professional Services set forth in the CHANGE ORDER or AGREEMENT, Exhibit "CO/STA-A", the compensation the COUNTY has previously agreed to pay to the CONSULTANT, or SERVICE PROVIDER, as set forth in Exhibit "B" of the Professional Services Agreement, or Service Provider Agreement, shall be changed to be as follows:

Section/Task Number	Section/Task Name	Compensation In the Basic Agreement	Adjustment(s) by Previous CO or STA Nos. 1-4	Adjustment(s) Due to this CO or STA	Summary of Changed Compensation
1-3	Maintenance		\$156,720.00		\$156,720.00
4	Modernization / Public Works Bldg.		\$42,020.00	0.00	\$42,020.00
5	Maintenance Renewal / Lee County Admin. Building East – Add 3 passenger elevators			\$4448.76/Ea.	
TOTAL			\$198,740.00		\$198,740.00

X CHANGE ORDER AGREEMENT No. _____

SUPPLEMENTAL ^{or} TASK AUTHORIZATION No. _____

EXHIBIT "CO/STA-D"

Date: 10/27/06

CONSULTANT'S, OR SERVICE PROVIDER'S, ASSOCIATED SUB-CONSULTANT(S) AND SUBCONTRACTOR(S)

for RFQ-03-02 ELEVATOR MAINTENANCE AND MODERNIZATION SERVICES

CONSULTANT, or SERVICE PROVIDER, intends to engage the following sub-consultant(s) and/or sub-contractor(s) to assist the CONSULTANT, or SERVICE PROVIDER, in providing and performing the services, tasks, or work required under this CHANGE ORDER, or SUPPLEMENTAL TASK AUTHORIZATION AGREEMENT.

(If none, enter the word "none" in the space below.)

Service and/or Work to be Provided or Performed	Name and Address of Individual or Firm	Disadvantaged, Minority or Women Business Enterprise, (If Yes, Indicate Type)			Sub-Consultant Services are Exempted from Prime Consultant=s Insurance Coverage	
		Yes	No	Type	Yes	No
	None					

X CHANGE ORDER AGREEMENT No. 5

or

SUPPLEMENTAL TASK AUTHORIZATION No. _____

EXHIBIT "CO/STA-E"

Date: 10/27/06

PROJECT GUIDELINES AND CRITERIA

for RFQ-03-02 ELEVATOR MAINTENANCE AND MODERNIZATION SERVICE

As a supplement, or change, to the Project Guidelines and Criteria set forth in the Professional Services Agreement, or Service Provider Agreement, Exhibit "E", the COUNTY has established the following Guidelines, Criteria, Goals, Objectives, Constraints, Schedule, Budget, and/or Requirements which shall serve as a guide to the CONSULTANT, or SERVICE PROVIDER, in performing the professional services, tasks, or work to be provided pursuant to the professional services set forth hereinbefore in CHANGE ORDER or SUPPLEMENTAL TASK AUTHORIZATION AGREEMENT, Exhibit "CO/STA-A", attached hereto:

(If none, enter the word "None" in the space below.)

ITEM No. 1

None

Crone, Lisa H.

From: Cail, Jimmy
Sent: Thursday, October 26, 2006 2:45 PM
To: Crone, Lisa H.
Cc: Weinmeister, Nancy L.
Subject: FW: Wachovia building

From: Dodgion Judith [mailto:Judith.Dodgion@kone.com]
Sent: Thursday, October 26, 2006 2:24 PM
To: Cail, Jimmy
Cc: Collins Dean
Subject: RE: Wachovia building

The pricing per month for each of the 3 units at Wachovia (Lee County Admin Bldg East) is:

\$370.73 Lee County Admin Bldg East - #1 passenger
\$370.73 Lee County Admin Bldg East - #2 passenger
\$370.73 Lee County Admin Bldg East - #3 passenger

Please contact us if you need further information or if we can be of assistance in any matter. Thank you!

Judy Dodgion
Administrative Mgr
KONE Inc Naples
tel: 239-598-9310
fax: 239-598-9335
judith.dodgion@kone.com

Judy,

can you send Jimmy the pricing for each new unit at Wachovia..

thanks
DC

-----Original Message-----

From: Cail, Jimmy [mailto:CAILJ@leegov.com]
Sent: Monday/18 September/2006 6:29 AM
To: Collins Dean
Cc: Rothell, Baxter W.
Subject: Wachovia building

Dean, the closing on the Wachovia Building happened over the weekend. We need you to go ahead and add it to the contract and start maintaining immediately. I will also give you a call. Thanks for all your help.

Jimmy Cail
Contract Specialist
Facilities Management

10/26/2006