

**CONTRACT AMENDMENT ANALYSIS AND STAFF RECOMMENDATION**

Contracting Agency: Housing Authority of the City of Milwaukee  
 Contract Number/Amendment Number: **Contract 14-035 / Amendment 1**  
 Contractor: **Otis Elevator Company (Milwaukee, WI)**  
 Amendment Amount: **\$163,740.00 not to exceed**  
 Type of Work, Services, or Material: Elevator Maintenance Services at Various Sites  
 Housing Development and Number: various sites  
 Job Number:

ORIGINAL

		scheduled maintenance annually	allowance for repairs annually	total
Arlington Court	640-443026	12,000.00	1,800.00	13,800.00
Becher Court	641-443026	3,240.00	1,200.00	4,440.00
College Court	643-443026	16,800.00	3,600.00	20,400.00
Hillside Terrace	681-443026	3,240.00	1,200.00	4,440.00
Holton Terrace	645-443026	8,400.00	1,200.00	9,600.00
Lincoln Court	646-443026	8,400.00	1,200.00	9,600.00
Locust Court	647-443026	12,000.00	2,400.00	14,400.00
Merrill Park	648-443026	8,400.00	1,200.00	9,600.00
Mitchell Court	649-443026	8,400.00	1,800.00	10,200.00
Riverview	650-443026	12,000.00	1,800.00	13,800.00
CCC	686-443026	1,620.00	600.00	2,220.00
COS	614-443026	1,620.00	600.00	2,220.00
HFRC	676-443026	1,620.00	600.00	2,220.00
SSNC	629-443026	1,620.00	600.00	2,220.00
PL mgmt office	671-443026	1,620.00	600.00	2,220.00
subtotal		100,980.00	20,400.00	121,380.00
Cherry Court		9,600.00	1,200.00	10,800.00
Highland Gardens		3,240.00	600.00	3,840.00
Olga Village		3,240.00	600.00	3,840.00
Lapham Park		14,400.00	1,800.00	16,200.00
Westlawn Gardens		6,480.00	1,200.00	7,680.00
Total		137,940.00	25,800.00	163,740.00

**PROCUREMENT REVIEW**

**PROCURING SECTION: Modernization & Development Services**

The Contractor has performed satisfactorily during the initial contract period. Modernization & Development Services recommends that HACM exercise its option to renew the contract, extending the contract completion date one calendar year to December 31, 2016 and authorizing an additional \$163,740.00 (not to exceed) for expenditures in 2016. All other terms and conditions of the contract will remain in effect, including fee schedule/rates.

Director of Development Wam B. Jones Date 10/30/15

**EMERGING BUSINESS ENTERPRISES**

Target Contracting 20 % MBE and/or WBE  
 Proposed Contracting zero % MBE and/or WBE

Contractor has no need to subcontract in order to fulfill the requirements of the contract. Some EBE certified firms were identified through the WI Dept of Admin's business diversity program. Most of these EBE firms are dealers in parts. Contractor obtains parts (and any trouble-shooting thereto) directly from original elevator manufacturers; parts dealers would not be useful in this regard. One EBE firm does provide maintenance and repair services; however, it is located in Maryland. Thus, subcontracting to EBEs is impractical for this contract.

~~MDS Administrator~~ Contract Services Manager David S. Hays Date 30 Oct 2015

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Housing Development and Number: various sites  
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**SECTION 3**

Target Contracting	<u>10</u> %	Target Employment	<u>30% of new hires</u>
Proposed Contracting	<u>zero</u> %	Proposed Employment	<u>zero hires</u>

Since this contract amendment will not trigger Section 3 (no need to hire/subcontract) and the Contractor is bound by union guidelines on both hiring and subcontracting regulations by the National Elevator Industry Educational Program (NEIEP), it has been recommended by the Section 3 Coordinator and agreed to by the Contractor's Account Manager, Andy Piepkorn, that Mr. Piepkorn will inform the Section 3 Coordinator of any upcoming union-approved apprenticeship opportunities within the quad-county jurisdiction that may be of interest to HACM residents and non-HACM (lower tier) residents who may meet the minimum preliminary apprenticeship testing requirements. (Currently, the closest union-approved open elevator apprenticeship application opportunity is located in Madison, WI.) Also, in the event that there is a need to hire or subcontract under the contract amendment period, Contractor will inform the Section 3 Coordinator prior to the occurrence.

Section 3 Coordinator  Date 11/2/15

**FINANCE AND ACCOUNTING**

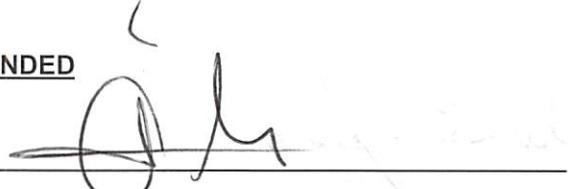
Finance and Accounting concurs with the recommendation of the Modernization & Development Services Section to execute the amendment as described. Charge the account number(s) as listed above.

Grants Accountant/Budget Analyst  Date 11/2/15

**RECOMMENDATION**

RECOMMEND EXECUTION OF CONTRACT AMENDMENT AS INDICATED ABOVE.

**APPROVAL RECOMMENDED**

Chief Financial Officer  Date 11/2/15

Asst Secretary-Mod Coordinator  Date 11/3/15

**APPROVED**

Secretary-Executive Director  Date 11/25/15