

## CONTRACT AMENDMENT ANALYSIS AND STAFF RECOMMENDATION

Contracting Agency: Housing Authority of the City of Milwaukee  
Contract Number/Amendment Number: Contract 14-035 / Amendment 2  
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:

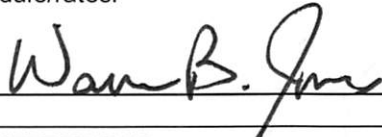
		scheduled maintenance annually	allowance for repairs annually	total
Arlington Court	640-443026	12,000.00	1,800.00	13,800.00
Becher Court	641-443026	3,240.00	1,200.00	4,440.00
College Court	643-443026	16,800.00	3,600.00	20,400.00
Hillside Terrace	681-443026	3,240.00	1,200.00	4,440.00
Holton Terrace	645-443026	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 and subsequent renewal year. Modernization & Development Services recommends that HACM exercise its option to renew the contract for a third and final year, extending the contract completion date to December 31, 2017 and authorizing an additional \$163,740.00 (not to exceed) for expenditures in 2017. All other terms and conditions of the contract will remain in effect, including fee schedule/rates.

Director of Development



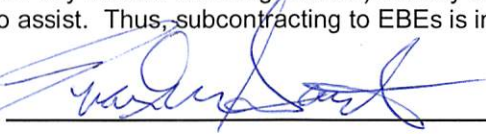
Date \_\_\_\_\_

#### **EMERGING BUSINESS ENTERPRISES**

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

The Contractor will not trigger EBE, as it has no need to subcontract and is bound by union regulations (National Elevator Industry Educational Program) on both subcontracting and hiring. It has been recommended by the Section 3 Coordinator and agreed to by the Contractor's Elevator Service Account Manager, Tyler C. Braniff, that Mr. Braniff shall inform the Section 3 Coordinator of any upcoming union-approved subcontracting opportunities within the quad-county jurisdiction that may be of interest to contractors that may meet MBE/WBE certification requirements. Also, in the event that a decision is made based on a need to subcontract, the Contractor and all potential subcontractors shall inform the Section 3 Coordinator prior to the occurrence. It should also be noted that some EBE certified firms were identified through the Wisconsin Department of Administration's business diversity program. However, the majority of these EBE firms are dealers in parts. The Contractor obtains parts (and any trouble-shooting thereto) directly from original elevator manufacturers; parts dealers would not be able to assist. Thus, subcontracting to EBEs is impractical for this contract.

Contract Services Manager



Date \_\_\_\_\_

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### **SECTION 3**

Target Contracting (when triggered) 10 %      Target Employment (when triggered) 30% of new hires  
Proposed Contracting zero %      Proposed Employment no need to hire

The Contractor will not trigger Section 3, as it has no need to subcontract or hire and is bound by union regulations (National Elevator Industry Educational Program) on both subcontracting and hiring. It has been recommended by the Section 3 Coordinator and agreed to by the Contractor's Elevator Service Account Manager, Tyler C. Braniff, that Mr. Braniff shall inform the Section 3 Coordinator of any upcoming union-approved subcontracting and/or apprenticeship opportunities within the quad-county jurisdiction that may be of interest to Section 3 Business Concerns and/or any HACM residents/(lower tier) non-HACM residents who may meet the minimum preliminary apprenticeship testing requirements. Currently, the closest union-approved open elevator constructor apprenticeship application opportunity is located in Madison, Wisconsin. Also, in the event that a decision has been made based on a need to subcontract or hire, the Contractor and all potential subcontractors shall inform the Section 3 Coordinator prior to the occurrence.

Section 3 Coordinator  Date \_\_\_\_\_

### **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 10/5/16

### **RECOMMENDATION**

RECOMMEND EXECUTION OF CONTRACT AMENDMENT AS INDICATED ABOVE.

### **APPROVAL RECOMMENDED**

Chief Financial Officer  Date 10/6/16

Asst Secretary-Mod Coordinator  Date 10/7/16

### **APPROVED**

Secretary-Executive Director  Date 10/10/16

HA-195 (09/2015)