

Portland, Oregon

FINANCIAL IMPACT and PUBLIC INVOLVEMENT STATEMENT For Council Action Items

(Deliver original to Financial Planning Division. Retain copy.)

1. Name of Initiator Jim Van Nest		2. Telephone No. 823-5680	3. Bureau/Office/Dept. Bureau of Internal Business Services
4a. To be filed (date): May 21, 2014	4b. Calendar (Check One) Regular <input type="checkbox"/> Consent <input checked="" type="checkbox"/> 4/5ths <input type="checkbox"/>		5. Date Submitted to Commissioner's office and FPD Budget Analyst: May 2, 2014
6a. Financial Impact Section: <input checked="" type="checkbox"/> Financial impact section completed		6b. Public Involvement Section: <input checked="" type="checkbox"/> Public involvement section completed	

1) Legislation Title: * Authorize a five year contract with Otis Elevator Company to provide elevator preventive maintenance, repair and inspection services for a not to exceed amount of \$1,839,748.00 (Ordinance RFP No. 116324)

2) Purpose of the Proposed Legislation: The purpose of this legislation is to authorize a contract with Otis Elevator Company for a 5-year contractual total not to exceed \$1,839,748.00. The contract will provide for elevator preventive maintenance services for 43 elevators in 22 locations for emergency services locations such as Police, Fire, and Emergency communications, other City buildings, and downtown public parking garages.

3) Which area(s) of the city are affected by this Council item? (Check all that apply—areas are based on formal neighborhood coalition boundaries)?

- | | | | |
|--|------------------------------------|------------------------------------|--------------------------------|
| <input checked="" type="checkbox"/> City-wide/Regional | <input type="checkbox"/> Northeast | <input type="checkbox"/> Northwest | <input type="checkbox"/> North |
| <input type="checkbox"/> Central Northeast | <input type="checkbox"/> Southeast | <input type="checkbox"/> Southwest | <input type="checkbox"/> East |
| <input type="checkbox"/> Central City | | | |
| <input type="checkbox"/> Internal City Government Services | | | |

FINANCIAL IMPACT

4) Revenue: Will this legislation generate or reduce current or future revenue coming to the City? If so, by how much? If so, please identify the source. No change in revenue generation is anticipated.

5) Expense: What are the costs to the City related to this legislation? What is the source of funding for the expense? (Please include costs in the current fiscal year as well as costs in future years. If the action is related to a grant or contract please include the local contribution or match required. If there is a project estimate, please identify the **level of confidence**.)

The costs to the City related to this legislation are expected to not exceed \$1,839,748.00 over a 5-year period. The elevator preventive maintenance services are currently funded in the

approved FY 13/14 budget, and will be included in subsequent years in the requested budget of the Bureau of Internal Business Services, Facilities Services Division.

6) Staffing Requirements:

- **Will any positions be created, eliminated or re-classified in the current year as a result of this legislation?** *(If new positions are created please include whether they will be part-time, full-time, limited term, or permanent positions. If the position is limited term please indicate the end of the term.)* No
- **Will positions be created or eliminated in future years as a result of this legislation?** No

(Complete the following section only if an amendment to the budget is proposed.)

7) Change in Appropriations *(If the accompanying ordinance amends the budget please reflect the dollar amount to be appropriated by this legislation. Include the appropriate cost elements that are to be loaded by accounting. Indicate "new" in Fund Center column if new center needs to be created. Use additional space if needed.)*

Fund	Fund Center	Commitment Item	Functional Area	Funded Program	Grant	Sponsored Program	Amount

[Proceed to Public Involvement Section — REQUIRED as of July 1, 2011]

PUBLIC INVOLVEMENT

8) Was public involvement included in the development of this Council item (e.g. ordinance, resolution, or report)? Please check the appropriate box below:

- ☒ **YES:** Please proceed to Question #9.
☐ **NO:** Please, explain why below; and proceed to Question #10.

9) If "YES," please answer the following questions:

- a) **What impacts are anticipated in the community from this proposed Council item?** None, as the elevator preventive maintenance services are primarily for internal business operations and will be performed in accordance with the contract.
- b) **Which community and business groups, under-represented groups, organizations, external government entities, and other interested parties were**

involved in this effort, and when and how were they involved? The goods and services contracting community, including contractors certified with the State of Oregon as minority, women, and emerging small businesses became involved when the public notice was posted in the City's Online Procurement Center on December 30, 2013.

c) How did public involvement shape the outcome of this Council item? Potential proposers were able to review the competitive solicitation, ask questions, provide comments, and submit a proposal to the competitive Request for Proposals (RFP).

d) Who designed and implemented the public involvement related to this Council item? The Office of Management and Finance, Bureau of Internal Business Services, Procurement Services advertised the competitive procurement notification on the City's Online Procurement Center that was open to the goods and services contracting community, including numerous contractors certified with the State as minority, women, and emerging small businesses.

e) Primary contact for more information on this public involvement process (name, title, phone, email): Jim Van Nest, Strategic Sourcing Program Coordinator, 503-823-5680, James.VanNest@portlandoregon.gov

10) Is any future public involvement anticipated or necessary for this Council item? Please describe why or why not.

No future public involvement is anticipated or necessary for this item.

Bryant Enge

Director, Bureau of Internal Business Services



CITY OF PORTLAND

OFFICE OF MANAGEMENT AND FINANCE

Charlie Hales, Mayor

Fred Miller, Interim Chief Administrative Officer

Bryant Enge, Director, Bureau of Internal Business Services

FOR MAYOR'S OFFICE USE
ONLY

Reviewed by Bureau Liaison _____

DATE: April 29, 2014

TO: Mayor Charlie Hales

FROM: Christine Moody, Chief Procurement Officer CM

RE: * Authorize a five year contract with Otis Elevator Company to provide elevator preventive maintenance, repair and inspection services for a not to exceed amount of \$1,839,748.00 (Ordinance RFP No. 116324)

1. INTENDED THURSDAY FILING DATE: May 21, 2014
2. REQUESTED COUNCIL AGENDA DATE: May 28, 2014
3. CONTACT NAME & NUMBER: Christine Moody x 31095
4. PLACE ON: ☒ CONSENT ☐ REGULAR
5. BUDGET IMPACT STATEMENT ATTACHED: ☒ Yes ☐ No ☐ N/A
6. ONE (1) ORIGINAL OF CONTRACT "APPROVED AS TO FORM" BY CITY ATTORNEY ATTACHED: ☐ Yes ☐ No ☒ N/A

7. BACKGROUND/ANALYSIS:

The City's Office of Management and Finance, Bureau of Internal Business Services, Facilities Services Division is responsible for providing routine preventive elevator maintenance, repair, inspections and code compliance for 43 elevators in 22 City locations. Elevators to be serviced include emergency services in the bureaus of Police, Fire, and Emergency Communications as well as other City buildings, and downtown public parking garages.

On December 30, 2013, the Chief Procurement Officer advertised competitive request for proposal (RFP) No. 116324 for Elevator Preventive Maintenance. On January 30, 2014, five (5) proposals were received. The proposals were reviewed, evaluated, and scored in accordance with Portland City Code 5.33.

The proposal from Otis Elevator Company was deemed responsive to the requirements of the solicitation, and received the highest evaluation scores for the elevator preventive maintenance, repair and inspection services. On March 25, 2014, the City issued a Notice of Intent to Negotiate and Award a three (3) year contract to Otis Elevator Company with the option to renew two additional years. No protests were received.

Otis Elevator Company has a current City of Portland business license, is in full compliance with the Equal Benefits Program, and their EEO Certification is current through May 30, 2014. Otis Elevator Company is not a State of Oregon Certified MWESB contractor. The level of confidence in the cost estimate for these services is High as historical information showing transactions made for previous years are well documented.

Legal issues - none known

Controversial issues - none known

An Equal Opportunity Employer

To help ensure equal access to programs, services and activities, the Office of Management & Finance will reasonably modify policies/procedures and provide auxiliary aids/services to persons with disabilities upon request.

Citizen participation –Mr. Brandon Flint, INLINE Commercial Construction, Inc., participated as an evaluator under the Minority Evaluator Program.

Link to current city policies – none

Other governmental participation – none

8. FINANCIAL IMPACT:

The City's Bureau of Internal Business Services, Facilities Services Division has current funds in the approved FY 13/14 budget, and funding for subsequent years will be included in their requested annual budgets.

9. RECOMMENDATION/ACTION REQUESTED:

Authorize a five year contract with Otis Elevator Company to provide elevator preventive maintenance, repair and inspection services in the amount of not to exceed \$1,839,748.00.