

Utilization Plan: View Plan



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44969U: Renovate SHU & Lobby Elevators Greenhaven CF

Status: Open
Estimated Cost: \$2,090,418

This Utilization Plan has been Approved. Scroll down to view the details of the plan. Click the button to transfer some or all of the subcontract records to an existing contract. Once a record is transferred it cannot be transferred again. However if any subcontractors are not included in the transfer they will remain available for transfer. After the transfer process is complete a Linked Contract field will appear to provide quick access to the contract. Use the Linked Contract field to access the contract that subs were previously transferred to.

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Utilization Plan Summary	
Proposal	44969U: Renovate SHU & Lobby Elevators Greenhaven CF
Reference	44969U
Phase	Original, version 0
Status	✔ Approved
Notification Date	9/2/2016 by Ashley Pallone
Due Date	9/8/2016 5:00 pm US/Eastern
Submission Date	9/7/2016 by Hank Kenley
Review Date	9/7/2016 by Ashley Pallone
Reviewer Public Comments	Your plan has been approved for MWBE purposes only. All listed subcontractors and suppliers must also be approved by OGS Vendor Responsibility Unit prior to participating in this project. Please contact our office if you need any assistance.

Transfer Subcontractors to Contract

Utilization Plan Information	
Estimated Bid/Transaction Amount	\$2,090,418

Primary Bidder/Prime Contractor						
Vendor Name	Cert	Inc in Goal	\$ Total	\$ Self Perf	\$ For Credit	Actions
P Otis Elevator	No	No	\$2,090,418	\$1,853,683 88.68%	-	View

Work Code Validation Symbol Legend: ✔ All assigned work codes are valid; ! Some assigned codes are not valid; ! No assigned work codes are valid; ✘ No work codes are assigned.

Subcontractors									
Subcontractor Name	Sub Tier	Cert	Inc in Goal	Type	Valid Work Code	\$ Commit	\$ Self Perf	\$ For Credit	Actions
1 Lift Solutions, Inc.	1	✔	✔ MBE	Reg. Dealer 100%	✔	\$236,735 11.32%	\$236,735 11.32%	\$236,735 11.32%	View

Goal & Waiver Summary					
Goal Type	Goal	Plan	Status	\$ to Reach Goal	Waiver Status
MBE	15.00%	11.32%	-3.68% below goal	\$76,828	✔ Waiver request saved
Otis Elevator has aggressively worked to provide the maximum MBE participation allowed by industry availability. The number of MBE companies that supply elevator parts/material is limited. We are continuing to research potential MBE participation in the areas of hardware, storage and engineering and will make every effort to include if identified.					
WBE	15.00%	0.00%	-15.00% below goal	\$313,563	✔ Waiver request saved

	Otis Elevator has aggressively worked to provide the maximum WBE participation allowed by industry availability. The number of WBE companies that supply elevator parts/material is limited. We are continuing to research potential WBE participation in the areas of hardware, storage and engineering and will make every effort to include if identified.				
Total	30.00%	11.32%	-18.68% below goal	\$390,390	 Waiver request saved
	The MWBE requirements in this project are significantly higher than past elevator projects Otis Elevator has been involved in. The elevator industry does not include a significant number of MWBE suppliers. We have contracted with the two major MBE suppliers/manufacturers that we use on a regular basis and are unaware of any WBE suppliers that we can use for elevator equipment on this project. Otis Elevator will make every effort to include additional MWBE as we progress through the project in an attempt to reach the project goals.				

Signature	
Signature	Hank Allyn Kenley
Title	Account Manager
Organization	Otis Elevator
Signature Date	9/7/2016

Additional Instructions	
Additional Instructions to Vendor	
Special Instructions to Vendor	<p>The MWBE utilization credit for Work performed by MWBEs will be determined as follows: a. Where an MWBE is not the Contractor - MWBE utilization credit will vary depending on how the MWBE performs Work under the Contract, as follows: i. Where the MWBE performs Work under the Contract as a subcontractor, MWBE utilization credit will be 100% of the dollar value of the Work performed by the MWBE. ii. Where the MWBE performs Work under the Contract as a manufacturer, MWBE utilization credit will be 100% of the dollar value of the Work performed by the MWBE. ii. Where the MWBE assists in the performance of the Work under the Contract as a supplier, MWBE utilization credit will be 60% of the dollar value of the Work performed by the MWBE. For purposes of this Contract, a supplier is a firm that operates a store, warehouse, or other establishment where materials, supplies, or equipment required under the Contract are bought, kept in stock, and regularly sold or leased to the public in the usual course of business. Suppliers purchase and sell products as their principal business under their own name. A supplier must purchase and keep materials in stock, and have a method to sell those materials to the public, through a storefront or website, and cannot supply materials specifically for a single contract. Suppliers of large bulk items must derive over 40% of their business from inventory in their warehouse and must take legal responsibility of the items, even if some items are drop-shipped. iv. Where the MWBE assists in the performance of the Work under the Contract as a broker, MWBE utilization credit will be equal to the percentage of the commission, or the mark-up percentage, of the items brokered, applied to the dollar value of the Work performed by the MWBE. For purposes of this Contract, a broker is a firm that fills orders for a client by ordering, purchasing, or receiving supplies from a third-party supplier rather than out of its own existing inventory and, in light of the standard industry practices, provides no substantial services other than acting as an intermediary between a supplier and a customer. v. Where the MWBE assists in the performance of the Work under the Contract as a manufacturer's representative, MWBE utilization credit will be equal to the percentage of the commission, or the mark-up percentage, of the items brokered, applied to the dollar value of the Work performed by the MWBE. For purposes of this Contract, a manufacturer's representative is considered to be a broker.</p>