

## Utilization Plan: View Plan

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D45404P: Provide Battalion Headquarters, Building 75 Camp Smith Training Site

Status: Open  
Estimated Cost: \$144,800

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	D45404P: Provide Battalion Headquarters, Building 75 Camp Smith Training Site
Reference	45404P
Phase	Original, version 0
Status	 <b>Approved</b>
Notification Date	8/25/2016 by Mariam Mehanna
Due Date	8/31/2016 5:00 pm US/Eastern
Submission Date	8/30/2016 by Anita Carulli
Review Date	8/31/2016 by Mariam Mehanna
Reviewer Public Comments	<b>Your plan has been Accepted As Noted, that the MWBE goals have not been waived or lowered, your firm is still required to meet the 30% goal of the contract. All listed subcontractors and suppliers must also be approved by OGS Vendor Responsibility Unit prior to participating in this project. Per our conversation your firm has agreed to continue its efforts to meet the remaining goal throughout the course of the contract. Also note your request for a partial waiver has been denied, you can submit your request for a partial waiver if necessary at the end of the project along with supporting documentation of your efforts to meet the goals. Also please note that the credit granted for the use of an MWBE supplier is only 60% of their contract value. Currently your plan is \$20,590.00 or 14% short of goal. Please contact our office if you need assistance.</b>
Reviewer Private Comments	<b>Subs/suppliers confirmed</b>

## Utilization Plan Information

Estimated Bid/Transaction Amount	\$144,800
Private Comments	<b>Compliance Specialists, please ensure contractor identifies the proper credit to be granted to brokers, manufacturers, and suppliers.</b>
Vendor Comments	<b>The utilization plan meets 19% of the 30% goal for MBE &amp; WBE. We have requested a waiver for the balance since our insulation, material, fixtures and equipment estimated total is \$37,000.</b>

## Primary Bidder/Prime Contractor

Vendor Name	Cert	Inc in Goal	\$ Total	\$ Self Perf	\$ For Credit	Actions
 S & L PLUMBING & HEATING CORP	<a href="#">No</a>	No	\$144,800	\$111,950 77.31%	-	<a href="#">View</a>

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	Cert	Inc	Type	Valid	\$	\$ Self	\$ For	Actions
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	Tier		in Goal		Work Code	Commit	Perf	Credit	
<b>1</b> A. Alport & Son, Inc	1			Reg. Dealer 100%		\$25,000 17.27%	\$25,000 17.27%	\$25,000 17.27%	<a href="#">View</a>
<b>1</b> Medina Insulation Corp	1			Sub 100%		\$7,850 5.42%	\$7,850 5.42%	\$7,850 5.42%	<a href="#">View</a>

## Goal & Waiver Summary

Goal Type	Goal	Plan	Status	\$ to Reach Goal	Waiver Status
<b>MBE</b>	<b>15.00%</b>	<b>5.42%</b>	<b>-9.58% below goal</b>	<b>\$13,870</b>	<b>Waiver request saved</b>
I will continue to provide good faith effort to meet the goal.					
Attached files:					
	<a href="#">View</a>	MBE GOAL WAIVER		DOCX	13.29 KB
	<a href="#">View</a>	MBE_WAIVER(2).docx		DOCX	13.29 KB
<b>WBE</b>	<b>15.00%</b>	<b>17.27%</b>	<b>2.27% above goal</b>		
<b>Total</b>	<b>30.00%</b>	<b>22.69%</b>	<b>-7.31% below goal</b>	<b>\$10,590</b>	<b>Waiver request saved</b>
I will continue to provide good faith effort to meet the goal.					
Attached files:					
	<a href="#">View</a>	MBE WAIVER		DOCX	13.29 KB
	<a href="#">View</a>	MBE_WAIVER(3).docx		DOCX	13.29 KB

## Signature

Signature	Anita Carulli
Title	Operations Manager
Organization	S & L PLUMBING & HEATING CORP
Signature Date	8/30/2016

## 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</p>

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.

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