



HISTORIC
FRANKLIN
TENNESSEE

REVISED

ITEM #15
WRKS 01/08/13

MEMORANDUM

January 4, 2013

TO: Board of Mayor and Aldermen

FROM: Eric S. Stuckey, City Administrator
Russell Truell, Assistant City Administrator / CFO
Lisa Clayton, Parks Director
Brian Wilcox, Purchasing Manager

SUBJECT: Consideration of bid award to Office of Joel Tomlin, III, LLC of Franklin, TN in the total amount of \$16,716 for tree supply, planting and related contract services for the Parks Department (Purchasing Office Procurement Solicitation No. 2013-006; \$16,866 budgeted for project with 50% to be transferred from Tree Bank Reserves and 50% to be reimbursed by State grant; Contract No. 2012-0202)

Purpose

The purpose of this memorandum is to provide the Board of Mayor and Aldermen (BOMA) with information to consider a bid award for tree supply, planting and related contract services.

Background

The subject procurement is to purchase the supply, delivery, planting, maintenance and related contract services for a total quantity of 84 two-inch caliper trees, consisting of 15 different varieties, at seven of the City's parks. The trees would be planted according to the following distribution:

No.	Variety Name	Recommended quantities for Jobsite No. ...							Total recommen ded quantities for all jobsites
		1 (Del Rio Park)	2 (Fieldstone Park)	3 (Park at Harlinsdale Farm)	4 (Jim Warren Park)	5 (Liberty Park)	6 (Pinkerton Park)	7 (Winstead Hill Park)	
1	American Beech			3					3
2	Burr Oak			2	4		2		8
3	Ginkgo				3				3
4	Lacebark Elm			4	2				6
5	Nuttall Oak				4				4
6	Shagbark Hickory				4				4
7	Shellbark Hickory				4				4
8	Shumard Oak	2							2
9	Southern Red Oak				6				6
10	Sweetgum			8	6				14
11	Sugar Maple				5				5
12	Sycamore			3				1	4
13	Tulip Poplar			3					3
14	Eastern White Pine					4			4
15	Willow Oak		3		10			1	14
Recommended Grand Totals:		2	3	23	48	4	2	2	84

The City published on November 29, 2012 a Notice to Bidders in the *Williamson Herald* for tree supply, planting and related contract services. In addition, bid documents were sent on or about the same date directly to thirteen (13) potential bidders known or thought to be interested in this solicitation. Bids from three (3) vendors were publicly opened at the bid opening held on December 19, 2012. A tabulation of the bids received for this solicitation is attached.



Financial Impact

The apparent lowest responsive and responsible bid, from Office of Joel Tomlin, III, LLC of Franklin, TN, is in the total amount of \$18,905 for the specified estimated total quantity of 95 trees. This bid was identified because it is the lowest bid that meets or exceeds the City's intention as expressed and implied by the City's specifications as well as the instructions, terms and conditions pertaining to this procurement solicitation. The project budget is \$16,866, with 50% of the cost of the project to be transferred from Tree Bank Reserves and 50% to be reimbursed by State grant. The Joel Tomlin bid amount is \$2,039 (12%) over budget for the specified estimated total quantity of 95 trees. Therefore, staff proposes reducing the quantity of trees to be supplied, planted and maintained from 95 to 84, thus reducing the amount of the award from \$18,905 to \$16,716, a figure that is \$150 (1%) under budget. Such a reduction is consistent with the specifications of the bid which stipulated:

The exact quantities of trees to be planted pursuant to this procurement solicitation shall be determined by the City after the bids have been submitted. The City intends to plant the maximum number of trees possible, in approximately the proportions implied by the quantities estimated below, within the budget allotted for the project.

The estimated quantity for each tree variety indicated ... represents the approximate number of trees that the Parks Department anticipates planting pursuant to this procurement solicitation. These numbers are estimates only and do not represent a guaranteed minimum or maximum.

If the Board of Mayor and Aldermen approves this bid award, then the invoice(s) totaling the amount of this bid award would be allocated to the Parks Department's General Fund budget for fiscal year 2013.

Options

In accordance with the bid documents, the City reserves the right to reject any and all bids.

Recommendation

Staff recommends that the City accept the apparent lowest best bid, from Office of Joel Tomlin, III, LLC of Franklin, TN, in the total amount of \$16,716 for the total quantity of 84 trees. Purchasing Manager Brian Wilcox is of the opinion that the prepared specifications as distributed allowed for competition among multiple vendors, and that the staff recommendation appears to be made in a fair and impartial manner based upon the bids received.

Tabulation of Bids *

Purchasing Office Solicitation No.:		2013-006 (tree supply, planting and related contract services)						
Notice to Bidders published in the <i>Williamson Herald</i> on:		11/29/12						
Number of vendors that were notified of / that responded to this solicitation for bids:		13 / 3						
Date and time bids due and publicly opened:		12/19/12 2:00 PM						
Present at opening of bids:		Justin Stelter of Justin Stelter, Patrick Haller of Haller's Landscaping & Lawncare, and Joel Tomlin of Office of Joel Tomlin, III, LLC; Todd Snackenberg of the City of Franklin Parks Department; and Dee Settle and Brian Wilcox of the City of Franklin Purchasing Office						
Target meeting of BOMA at which recommendation will be considered:		1/22/13						
Bids received from:	Bid No.:	Bid description:	Does the bid MOES ¹ ? / If not, how many exceptions do not MOES ¹ ?	Total value of bid based on <u>specified estimated</u> quantities ² and quoted unit prices:	Total value of bid based on <u>recommended</u> quantities ³ and quoted unit prices:	Payment terms:	Estimated time of completion of project after receipt of order:	Bid and associated pricing is valid and may be accepted through:
Haller's Landscaping & Lawncare 370 Taggart Haller Lane Sparta, TN 38583 Patrick M. Haller, Owner 931/261-5885 phaller@blomand.net	1 of 1	tree supply, planting and related contract services	Bidder takes no exceptions	\$23,415.01	\$20,700.21	net 30 days	60 days	02/28/13
Justin Stelter 1344 Carnton Lane P.O. Box 565 Franklin, TN 37065 615/596-1696 justinstelter@gmail.com	1 of 1	tree supply, planting and related contract services	Bidder takes no exceptions	\$23,275.00	\$20,580.00	net 30 days	15 days	04/01/13
Office of Joel Tomlin, III, LLC. 4115 Mallory Lane, Suite 100C Franklin, TN 37067 Joel Tomlin, III; President 615/445-5694 joel@joeltomlin.com	1 of 1	tree supply, planting and related contract services	Bidder takes no exceptions	\$18,905.00	\$16,716.00	net 30 days	60 days	02/28/13
¹ MOES indicates "meet(s) or exceed(s) specifications"								
² The estimated quantity for each tree variety was indicated in the specifications and represents the approximate number of trees that the Parks Department anticipated, at the time specifications were released, planting pursuant to this procurement solicitation. These numbers were estimates only and did not represent a guaranteed minimum or maximum. Pursuant to the specifications, for purposes of bid evaluation, the City will use the estimated quantities to determine the total value of each bid.								
³ Some of the recommended quantities for each tree variety, as well as the total number of trees for all varieties, have been reduced from what was estimated in the specifications in order for the total value of the award to be within budget. In accordance with the specifications, the exact quantities of trees to be planted pursuant to this procurement solicitation shall be determined by the City after the bids have been submitted.								

* Shaded bid is apparent lowest best bid

Haller's Landscaping & Lawncare													
No.	Variety	Total specified quantities at all jobsites	Total recommended quantities at all jobsites	Quoted unit price per planted tree prior to provisional acceptance	Calculated extended pricing based on specified estimated quantities prior to provisional acceptance	Quoted unit price per planted tree during year no. 1 of maintenance and guarantee period	Calculated extended pricing based on specified estimated quantities during year no. 1 of maintenance and guarantee period	Quoted unit price per planted tree during year no. 2 of maintenance and guarantee period	Calculated extended pricing based on specified estimated quantities during year no. 2 of maintenance and guarantee period	Quoted unit price per planted tree during year no. 3 of maintenance and guarantee period	Calculated extended pricing based on specified estimated quantities during year no. 3 of maintenance and guarantee period	Total value of bid based on specified estimated quantities and quoted unit prices	Total value of bid based on recommended quantities and quoted unit prices
1	American Beech	3	3	\$163.15	\$489.45	\$65.00	\$195.00		\$0.00		\$0.00	\$684.45	\$684.45
2	Burr Oak	10	8	\$197.13	\$1,971.30	\$65.00	\$650.00		\$0.00		\$0.00	\$2,621.30	\$2,097.04
3	Ginkgo	3	3	\$212.58	\$637.74	\$65.00	\$195.00		\$0.00		\$0.00	\$832.74	\$832.74
4	Lacebark Elm	8	6	\$190.98	\$1,527.84	\$65.00	\$520.00		\$0.00		\$0.00	\$2,047.84	\$1,535.88
5	Nuttall Oak	4	4	\$183.25	\$733.00	\$65.00	\$260.00		\$0.00		\$0.00	\$993.00	\$993.00
6	Shagbark Hickory	4	4	\$206.50	\$826.00	\$65.00	\$260.00		\$0.00		\$0.00	\$1,086.00	\$1,086.00
7	Sholibark Hickory	4	4	\$206.50	\$826.00	\$65.00	\$260.00		\$0.00		\$0.00	\$1,086.00	\$1,086.00
8	Shumard Oak	2	2	\$184.75	\$369.50	\$65.00	\$130.00		\$0.00		\$0.00	\$499.50	\$499.50
9	Southern Red Oak	7	6	\$192.48	\$1,347.36	\$65.00	\$455.00		\$0.00		\$0.00	\$1,802.36	\$1,544.88
10	Sweetgum	16	14	\$168.55	\$2,696.80	\$65.00	\$1,040.00		\$0.00		\$0.00	\$3,736.80	\$3,269.70
11	Sugar Maple	6	5	\$187.90	\$1,127.40	\$65.00	\$390.00		\$0.00		\$0.00	\$1,517.40	\$1,264.50
12	Sycamore	4	4	\$155.43	\$621.72	\$65.00	\$260.00		\$0.00		\$0.00	\$881.72	\$881.72
13	Tulip Poplar	3	3	\$173.20	\$519.60	\$65.00	\$195.00		\$0.00		\$0.00	\$714.60	\$714.60
14	Eastern White Pine	5	4	\$167.50	\$837.50	\$65.00	\$325.00		\$0.00		\$0.00	\$1,162.50	\$930.00
15	Willow Oak	16	14	\$169.30	\$2,708.80	\$65.00	\$1,040.00		\$0.00		\$0.00	\$3,748.80	\$3,280.20
Grand totals:		95	84		\$17,240.01		\$6,175.00		\$0.00		\$0.00	\$23,415.01	\$20,700.21

Justin Stelter													
No.	Variety	Total specified quantities at all jobsites	Total recommended quantities at all jobsites	Quoted unit price per planted tree prior to provisional acceptance	Calculated extended pricing based on specified quantities prior to provisional acceptance	Quoted unit price per planted tree during year no. 1 of maintenance and guarantee period	Calculated extended pricing based on specified quantities during year no. 1 of maintenance and guarantee period	Quoted unit price per planted tree during year no. 2 of maintenance and guarantee period	Calculated extended pricing based on specified quantities during year no. 2 of maintenance and guarantee period	Quoted unit price per planted tree during year no. 3 of maintenance and guarantee period	Calculated extended pricing based on specified quantities during year no. 3 of maintenance and guarantee period	Total value of bid based on <u>specified estimated</u> quantities and quoted unit prices	Total value of bid based on <u>recommended</u> quantities and quoted unit prices
1	American Beech	3	3	\$165.00	\$495.00	\$80.00	\$240.00		\$0.00		\$0.00	\$735.00	\$735.00
2	Burr Oak	10	8	\$165.00	\$1,650.00	\$80.00	\$800.00		\$0.00		\$0.00	\$2,450.00	\$1,960.00
3	Ginkgo	3	3	\$165.00	\$495.00	\$80.00	\$240.00		\$0.00		\$0.00	\$735.00	\$735.00
4	Lacebark Elm	8	6	\$165.00	\$1,320.00	\$80.00	\$640.00		\$0.00		\$0.00	\$1,960.00	\$1,470.00
5	Nuttall Oak	4	4	\$165.00	\$660.00	\$80.00	\$320.00		\$0.00		\$0.00	\$980.00	\$980.00
6	Shagbark Hickory	4	4	\$165.00	\$660.00	\$80.00	\$320.00		\$0.00		\$0.00	\$980.00	\$980.00
7	Shellbark Hickory	4	4	\$165.00	\$660.00	\$80.00	\$320.00		\$0.00		\$0.00	\$980.00	\$980.00
8	Shumard Oak	2	2	\$165.00	\$330.00	\$80.00	\$160.00		\$0.00		\$0.00	\$490.00	\$490.00
9	Southern Red Oak	7	6	\$165.00	\$1,155.00	\$80.00	\$560.00		\$0.00		\$0.00	\$1,715.00	\$1,470.00
10	Sweetgum	16	14	\$165.00	\$2,640.00	\$80.00	\$1,280.00		\$0.00		\$0.00	\$3,920.00	\$3,430.00
11	Sugar Maple	6	5	\$165.00	\$990.00	\$80.00	\$480.00		\$0.00		\$0.00	\$1,470.00	\$1,225.00
12	Sycamore	4	4	\$165.00	\$660.00	\$80.00	\$320.00		\$0.00		\$0.00	\$980.00	\$980.00
13	Tulip Poplar	3	3	\$165.00	\$495.00	\$80.00	\$240.00		\$0.00		\$0.00	\$735.00	\$735.00
14	Eastern White Pine	5	4	\$165.00	\$825.00	\$80.00	\$400.00		\$0.00		\$0.00	\$1,225.00	\$980.00
15	Willow Oak	16	14	\$165.00	\$2,640.00	\$80.00	\$1,280.00		\$0.00		\$0.00	\$3,920.00	\$3,430.00
	Grand totals:	95	84		\$15,675.00		\$7,600.00		\$0.00		\$0.00	\$23,275.00	\$20,580.00

Office of Joel Tomlin, III, LLC													
No.	Variety	Total specified quantities at all jobsites	Total recommended quantities at all jobsites	Quoted unit price per planted tree prior to provisional acceptance	Calculated extended pricing based on specified estimated quantities prior to provisional acceptance	Quoted unit price per planted tree during year no. 1 of maintenance and guarantee period	Calculated extended pricing based on specified estimated quantities during year no. 1 of maintenance and guarantee period	Quoted unit price per planted tree during year no. 2 of maintenance and guarantee period	Calculated extended pricing based on specified estimated quantities during year no. 2 of maintenance and guarantee period	Quoted unit price per planted tree during year no. 3 of maintenance and guarantee period	Calculated extended pricing based on specified estimated quantities during year no. 3 of maintenance and guarantee period	Total value of bid based on <u>specified estimated</u> quantities and quoted unit prices	Total value of bid based on <u>recommended</u> quantities and quoted unit prices
1	American Beech	3	3	\$167.00	\$501.00	\$32.00	\$96.00		\$0.00		\$0.00	\$597.00	\$597.00
2	Burr Oak	10	8	\$167.00	\$1,670.00	\$32.00	\$320.00		\$0.00		\$0.00	\$1,990.00	\$1,592.00
3	Ginkgo	3	3	\$167.00	\$501.00	\$32.00	\$96.00		\$0.00		\$0.00	\$597.00	\$597.00
4	Lacebark Elm	8	6	\$167.00	\$1,336.00	\$32.00	\$256.00		\$0.00		\$0.00	\$1,592.00	\$1,194.00
5	Nuttall Oak	4	4	\$167.00	\$668.00	\$32.00	\$128.00		\$0.00		\$0.00	\$796.00	\$796.00
6	Shagbark Hickory	4	4	\$167.00	\$668.00	\$32.00	\$128.00		\$0.00		\$0.00	\$796.00	\$796.00
7	Shellbark Hickory	4	4	\$167.00	\$668.00	\$32.00	\$128.00		\$0.00		\$0.00	\$796.00	\$796.00
8	Shumard Oak	2	2	\$167.00	\$334.00	\$32.00	\$64.00		\$0.00		\$0.00	\$398.00	\$398.00
9	Southern Red Oak	7	6	\$167.00	\$1,169.00	\$32.00	\$224.00		\$0.00		\$0.00	\$1,393.00	\$1,194.00
10	Sweetgum	16	14	\$167.00	\$2,672.00	\$32.00	\$512.00		\$0.00		\$0.00	\$3,184.00	\$2,786.00
11	Sugar Maple	6	5	\$167.00	\$1,002.00	\$32.00	\$192.00		\$0.00		\$0.00	\$1,194.00	\$995.00
12	Sycamore	4	4	\$167.00	\$668.00	\$32.00	\$128.00		\$0.00		\$0.00	\$796.00	\$796.00
13	Tulip Poplar	3	3	\$167.00	\$501.00	\$32.00	\$96.00		\$0.00		\$0.00	\$597.00	\$597.00
14	Eastern White Pine	5	4	\$167.00	\$835.00	\$32.00	\$160.00		\$0.00		\$0.00	\$995.00	\$796.00
15	Willow Oak	16	14	\$167.00	\$2,672.00	\$32.00	\$512.00		\$0.00		\$0.00	\$3,184.00	\$2,786.00
	Grand totals:	95	84		\$15,865.00		\$3,040.00		\$0.00		\$0.00	\$18,905.00	\$16,716.00