

**Lee County Board Of County Commissioners
Agenda Item Summary**

Blue Sheet No. 20040489

1. REQUESTED MOTION:

ACTION REQUESTED: Approve Bid Waiver # 040410 to waive the formal quotation procedure and allow DOT (Model 621D - \$102,815) and Parks (Model 521D - \$91,355) to purchase Case loaders from Briggs Equipment; the exclusive/sole source dealer for the Case product line. Grand total cost for the two loaders: \$194,170.

WHY ACTION IS NECESSARY: Expenditures exceeding \$50,000 require Board approval.

WHAT ACTION ACCOMPLISHES: Provides DOT and Parks with new and reliable machines; replacing asset numbers 018370 and 031814 which have met Fleet Management's replacement criteria (please see Attachment #4).

2. DEPARTMENTAL CATEGORY:

COMMISSION DISTRICT #

A11A

3. MEETING DATE:

05-11-2004

4. AGENDA:

- CONSENT
- ADMINISTRATIVE
- APPEALS
- PUBLIC
- WALK ON
- TIME REQUIRED:

5. REQUIREMENT/PURPOSE:
(Specify)

- STATUTE
- ORDINANCE
- ADMIN. CODE
- OTHER

AC-4-1

6. REQUESTOR OF INFORMATION:

- A. COMMISSIONER
- B. DEPARTMENT *Parks & DOT*
- C. DIVISION

BY: *John Yarbrough, Director*
Scott Gilbertson, P.E., Director

BACKGROUND: On April 12, 2004, the Division of Purchasing received a request from Fleet Management to waive the formal quotation procedure and purchase two Case loaders for DOT and Parks. Fleet, in conjunction with user departments, is working to standardize on one brand of rubber tire loader in an attempt to reduce the overall amount of mechanic training required; to reduce parts inventory; and to increase interchangeability of attachments and operator familiarity with one brand of machine in an effort to reduce the liability to the County due to operator error. Fleet has negotiated discounts of 44% off of list price on the 621D and a 36% on the 521D; options are at a 40% discount. (These discounts exceed or are consistent with discounts offered by Case on the Florida State Contract.)

Funds are available: KH5722015500.506430 (Parks) & PC5379114600.506430 (DOT)

Please see attachments:

- (1) Request for Bid Waiver/Justification for Waiver Purchase
- (2) Sole Source Verification Letter from Case Corporation
- (3) Briggs Equipment Quotations for the Two Loaders
- (4) Repair History of Equipment Being Replaced

8. MANAGEMENT RECOMMENDATIONS:

9. RECOMMENDED APPROVAL:

A Department Director	B Purchasing or Contracts	C Human Resources	D Other	E County Attorney	F Budget Services				G County Manager
<i>Handwritten initials</i>	<i>Handwritten initials</i>			<i>Handwritten initials</i>	OA	DM	Risk	GC	<i>Handwritten initials</i>
				<i>Handwritten initials</i>	<i>Handwritten initials</i>	<i>Handwritten initials</i>	<i>Handwritten initials</i>	<i>Handwritten initials</i>	<i>Handwritten initials</i>

10. COMMISSION ACTION:

- APPROVED
- DENIED
- DEFERRED
- OTHER

Rec. by CoAtty
Date: *4/22/04*
Time: *2:00 PM*
Forwarded To: *De. County*

RECEIVED BY
COUNTY ADMIN:
4-22-04
4:30
COUNTY ADMIN
FORWARDED TO:
4-21-04
ADD

CA

HS



DIVISION OF FLEET MANAGEMENT

To: Janet Sheehan, Purchasing Director
From: Marilyn L. Rawlings, Fleet Manager *MR*
Date: 4/06/2004
Re: Sole Source for Case

Please prepare a Blue Sheet for the purchase of two Case rubber tire loaders, one for the Department of Transportation and one for Parks and Recreation.

ACTION REQUESTED:

Approve the Bid Waiver to waive the formal quotation procedure and for the purchase of a Case rubber tire loader (model 621D) in the amount of \$102,815. and a Case rubber tire loader (model 521D) in the amount of \$91,355 for a grand total of \$194,170.

WHY ACTION IS NECESSARY:

Board approval is required on Bid Waivers and any expenditure in excess of \$50,000.

WHAT ACTION ACCOMPLISHES:

This purchase will provide the Departments of Transportation and Parks and Recreation with two new reliable machines. These two new machines will replace asset numbers, 018370 and 031814, which meet Lee County Fleet Management's replacement criteria (See attached documents)

Funds for this purchase are available from account string:

Case 521D for Parks & Rec.	\$ 91,355	# <u>KH5722015500.506430.</u>
Case 621D for DOT	\$102,815	# <u>PC5379114600.506430.</u>

BACK GROUND:

Lee County needs to replace two rubber tire loaders, one from Parks & Recreation (018370) and one from DOT Operation (031814). Both loaders have reached their projected life cycle. ***(See attached sheets)***

Lee County Fleet Management, in conjunction with the user departments, is working to standardize with one brand of rubber tire loaders in an attempt to reduce the overall mechanic training required, to reduce the overall parts inventory and to

increase the County's ability to make any attachments interchangeable from machine to machine and department to department. This standardization will also help the equipment operators to become familiar with one brand of machine and reduce the liability to the County because of operator error.

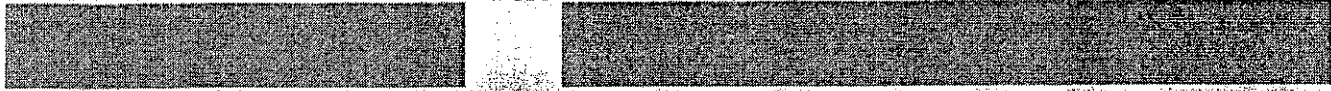
Lee County Purchasing has obtained a letter from Case Construction Corporation stating that Briggs Equipment is the only authorized Case dealership in Lee County for sales, parts, and service. Fleet Management staff have negotiated discounts of 44% off list price on the 621D loader and a 36% discount on the 521D loader. Any other options will come with a 40% discount. These discounts exceed or are consistent with discounts offered by Case on the Florida State Contract.

Parks & Recreation, DOT Operations, and Fleet Management have all agreed that standardization with the Case brand rubber tire loaders is in the best interest of Lee County.

H:\Acquisition Specialist\Blue Sheets\Case Loaders-2004.doc

MATERIAL REQUEST FORM

Non-Surcharge



BOARD DATE
Blue Sheet #

R.P.O. # _____

PO # _____

VENDOR: **Briggs Equipment**
7001 Industrial Drive South
West Palm Beach, FL 33404

VENDOR # **210704**

ORDER CONFIRMED BY: **Mark Anthony**

PHONE # **561-845-2273** cell-561-762-1556
FAX # **561-842-9546**

DELIVERY: **90-120 days**

REPLACES ASSET # **018370**

DEPT # **PARKS 155 - Parks & Recreation**

REGISTRATION, TITLE AND TAGS BEING PAID FOR BY: **N/A**

ACCOUNT STRING: **KH5722015500.506430**

FLEET MANAGEMENT SPEC #	04-007	QTY:	UNIT PRICE
This PO is opened for Parks & Recreation to replace 018370. This purchase order is based off of the Bid waiver #			
Case 521D Tier II wheel loader.		1	\$ 66,772.00
Z-bar loader arm linkage.		1	\$ -
Limited slip axles.		1	\$ 394.00
Tropical cooling system.		1	\$ -
Standard noise suppression.		1	\$ -
Canopy with ROPS.		1	\$ -
Standard steering system.		1	\$ -
3-spool, 2-level controls.		1	\$ 762.00
Mechanical suspension seat.		1	\$ -
Full coverage, steps and fenders.		1	\$ 658.00
English decals.		1	\$ -
17.5 X 25 12-PR goodyear tires.		1	\$ -
ACS pro-series 2000 coupler.		1	\$ 3,374.00
Outside mirrors.		1	\$ 198.00
Rotating amber beacon.		1	\$ 252.00
Ride control.		1	\$ 1,841.00
Transmission side covers.		1	\$ 245.00
Anti-vandal cover for control panel.		1	\$ 277.00
4-in-1 bucket. 358105A1		1	\$ 6,834.00
Forks for coupler. 388513A1		1	\$ 3,168.00
Boom for coupler. 124559A2		1	\$ 2,519.00
5-year or 5,000 hour full machine warranty.		1	\$ 4,061.00
Complete set of manuals, to include, parts, repair, and operators.			No charge
3-complete sets of keys.			No charge
		=	\$ 91,355.00
		-	\$ -
TOTAL AMOUNT OF PURCHASE ORDER:		=	\$ 91,355.00

APPROVED

BY: Danny Brashear
Operations Manager

DATE: **03/23/04**

MATERIAL REQUEST FORM

Non-Surcharge

[REDACTED]

BOARD DATE
Blue Sheet #

R.P.O. # _____

P.O.# _____

VENDOR: **Briggs Equipment**
7001 Industrial Drive South
West Palm Beach, FL 33404

VENDOR # **210704**

ORDER CONFIRMED BY: **Mark Anthony**

PHONE # **561-845-2273** cell-561-762-1556
FAX # **561-842-9546**

DELIVERY **90-120 days**

REPLACES ASSET # **031814**

DEPT # **TOP CANAL - DOT Operation / Canal Maintenance**

REGISTRATION TITLE AND TAGS BEING PAID FOR BY: **N/A**

ACCOUNT STRING **PC5379114600.506430**

FLEET MANAGEMENT SPEC #	04-101	QTY:	UNIT PRICE
This PO is opened for DOT Operations to replace 031814. This purchase order is based off of the Bid waiver #			
Case 621D wheel loader.		1	\$ 75,170.00
Limited slip differentials.		1	\$ -
Tropical cooling system.		1	\$ 394.00
Soundshield sound suppression.		1	\$ 1,350.00
Enclosed cab with AC.		1	\$ 5,159.00
Standard steering system.		1	\$ -
3-spool, 2-level controls.		1	\$ 762.00
Air seat.		1	\$ 234.00
Full coverage, steps and fenders.		1	\$ 658.00
English decals.		1	\$ -
20.5 X 25 12-PR goodyear tires.		1	\$ -
ACS pro-series 2000 coupler.		1	\$ 3,374.00
Standard counterweights.		1	\$ -
AM/FM weatherband radio.		1	\$ 420.00
Outside mirrors.		1	\$ 198.00
Rotating amber beacon.		1	\$ 252.00
Ride control.		1	\$ 1,841.00
Transmission side covers.		1	\$ 245.00
4-in-1 bucket. 358107A1		1	\$ 8,050.00
5-year or 5,000 hour full machine warranty.		1	\$ 4,708.00
Complete set of manuals, to include, parts, repair, and operators.			No charge
3-complete sets of keys.			No charge
		=	\$ 102,815.00
			\$ -
TOTAL AMOUNT OF PURCHASE ORDER:		=	\$ 102,815.00

APPROVED BY: Danny Brashear
Operations Manager

DATE: **03/23/04**

LEE COUNTY GOVERNMENT, DIVISION OF FLEET MANAGEMENT
EQUIPMENT AND VEHICLE REQUEST FORM
(PLEASE PRINT OR TYPE)

11. Funding source:

Vehicle Replacement Fund

Capital, Please Specify Account String PC5379114600.506430 AMB

Other, Please Specify Account String _____

If needed, please provide additional account strings: _____

12. We are authorizing a purchase not to exceed: \$ 110,000.⁰⁰

Betty L. Faust
REQUESTED BY

10/23/03
DATE

D. V. Chis 11/17/2003
SUPERVISOR DATE

Option 1: QUOTES AND REQUISITION. This option authorizes Fleet Management to obtain quotes and authorizes Fleet Management to issue a requisition using the account string(s) provided above.

Option 2: VEHICLE REPLACEMENT FUND PURCHASES. This option authorizes Fleet Management to obtain quotes and authorizes Fleet Management to purchase the equipment or vehicle using motor pool funds (formerly known as surcharge funds).

[Signature]
DEPARTMENT DIRECTOR

12/10/23
DATE

[Signature] 12-10-03
COUNTY MANAGER / DESIGNEE DATE

SUBMIT THIS COMPLETED FORM TO FLEET MANAGEMENT

[Signature]
FLEET ACQ. SPECIALIST

3/23/04
DATE

[Signature] 3/31/04
FLEET MANAGER DATE

For Fleet Use Only.

Price verification against State Contract and Sheriff's Contract.

Sole Source

Vendors Price \$ _____ State Contract \$ N/A Sheriff's Contract \$ N/A

LEE COUNTY GOVERNMENT, DIVISION OF FLEET MANAGEMENT
EQUIPMENT AND VEHICLE REQUEST FORM
(PLEASE PRINT OR TYPE)

Vehicles - Cars & Light Trucks:

- | | | | |
|---|--|---|--|
| <input type="checkbox"/> Cassette | <input type="checkbox"/> Plastic Bed-Liner | <input type="checkbox"/> Arrow Board ^A | <input type="checkbox"/> Strobe Light ^A |
| <input type="checkbox"/> CD Player | <input type="checkbox"/> Spray in bed liner | <input type="checkbox"/> Power Win/Locks | <input type="checkbox"/> 4-Corner Strobes |
| <input type="checkbox"/> Tires - All Terrain | <input type="checkbox"/> Long Bed | <input type="checkbox"/> Floor - Carpet | <input type="checkbox"/> Seats - Cloth |
| <input type="checkbox"/> Tow Package | <input type="checkbox"/> Short Bed | <input type="checkbox"/> Floor - Rubber | <input type="checkbox"/> Seats - Vinyl |
| <input type="checkbox"/> Trailer Hitch Receiver | <input type="checkbox"/> Cruise Control | <input type="checkbox"/> Tool boxes ^A | <input type="checkbox"/> Tinted Windows |
| <input type="checkbox"/> Limited Slip | <input type="checkbox"/> Tilt Steering Wheel | <input type="checkbox"/> Lockable Tailgate | <input type="checkbox"/> Camper Top ^A |
| <input type="checkbox"/> Back Up Alarm | <input type="checkbox"/> Cone Holder | <input type="checkbox"/> Security Alarm | <input type="checkbox"/> Auxiliary 12-Volt Plug ^A |
| <input type="checkbox"/> Work Lights | <input type="checkbox"/> Pipe Racks ^A | <input type="checkbox"/> Water Cooler Holder | <input type="checkbox"/> Steps ^A |
| <input type="checkbox"/> Mounted Winch ^A | <input type="checkbox"/> Bulk Fuel Tank W/Pump (Diesel or Unleaded) ^A | | |
| <input type="checkbox"/> Other. Please list: _____ | | | |

Front End Loader

~~Tractor~~

- | | | | |
|---|---|---|---|
| <input checked="" type="checkbox"/> Three spool Hyd Valve | <input checked="" type="checkbox"/> Mounted Tool Box ^A | <input checked="" type="checkbox"/> Mounted Strobe Light ^A | <input checked="" type="checkbox"/> Tinted Windows |
| <input type="checkbox"/> Front Weights | <input type="checkbox"/> Rear Weights | <input checked="" type="checkbox"/> Flashing Work Lights | <input checked="" type="checkbox"/> Water Cooler Holder |
| <input type="checkbox"/> Auxiliary 12-volt Plug ^A | <input type="checkbox"/> 4-Corner Strobe Lights | <input type="checkbox"/> Cassette Radio | <input checked="" type="checkbox"/> AM/FM Radio |
| <input type="checkbox"/> AM/FM/CD Radio | | | |
| <input checked="" type="checkbox"/> Other. Please list: <u>4 in 1 BUCKET, A/C CAB</u> | | | |

Trucks:

- | | | | |
|--|---|--|---|
| <input type="checkbox"/> Mounted Tool Box | <input type="checkbox"/> Mounted Strobe Light | <input type="checkbox"/> Tinted Windows | <input type="checkbox"/> Work Lights |
| <input type="checkbox"/> 4-Corner Strobe Lights | <input type="checkbox"/> Water Cooler Holder | <input type="checkbox"/> Fenders Over Rear Tires | <input type="checkbox"/> Flashing Work Lights |
| <input type="checkbox"/> Hyd Wet Line System | <input type="checkbox"/> AM/FM Radio | <input type="checkbox"/> Cassette Radio | <input type="checkbox"/> AM/FM/CD Radio |
| <input type="checkbox"/> Air Horns ^A | <input type="checkbox"/> Back Up Alarm | <input type="checkbox"/> Auxiliary 12-Volt Plug ^A | |
| <input type="checkbox"/> Other. Please list: _____ | | | |

10. What will be the primary use of the new equipment or vehicle? LOADING TRUCKS,
PUSHING DUMPS, ROW MAINTENANCE, REPAIR EROSION

^A Specify Dimensions, Makes, Models, or Locations _____

LEE COUNTY GOVERNMENT, DIVISION OF FLEET MANAGEMENT
EQUIPMENT AND VEHICLE REQUEST FORM

(PLEASE PRINT OR TYPE)

- This Loader needs to be able to use existing attachments for the 721 Case
- SEE OPTIONS ON SPEC SHEET

LEE COUNTY GOVERNMENT, DIVISION OF FLEET MANAGEMENT
EQUIPMENT AND VEHICLE REQUEST FORM
(PLEASE PRINT OR TYPE)

1. Department/Division: (name) DOT OPERATION

(divison) 5425 TOP Canal

2. Requested By: (print) TEM KESER Phone #: 694-3334

3. Driver/Operator of this new piece of equipment: ALBERT GOGEL

4. Days and hours this piece of equipment will be used: T-F 7:00AM - 5:30 PM

5. Location the equipment will be parked: 5560 ZIP DR.

6. Will this be a take home vehicle? Yes No

7. Is this a replacement equipment or vehicle? Yes No 7441

If yes: Asset #: 031814 Yr: 94 Make: JOHN DEERE Model: 544G Meter: 7059

8. What type of equipment or vehicle are you requesting?

Select all appropriate boxes:

- | | | | | | |
|---|--|----------------------------------|--|--|--|
| <input type="checkbox"/> Sedan | <input type="checkbox"/> Pickup truck | <input type="checkbox"/> ¼ Ton | <input type="checkbox"/> Van | <input type="checkbox"/> Excavator | <input type="checkbox"/> Gasoline |
| <input type="checkbox"/> Station Wagon | <input type="checkbox"/> Regular Cab | <input type="checkbox"/> ½ Ton | <input type="checkbox"/> Cargo | <input type="checkbox"/> 7 Passenger | <input checked="" type="checkbox"/> Diesel |
| <input type="checkbox"/> Sport Util Veh | <input type="checkbox"/> Extended Cab | <input type="checkbox"/> ¾ Ton | <input type="checkbox"/> Sliding Door | <input type="checkbox"/> 12 Passenger | <input type="checkbox"/> 4 Cylinder |
| <input type="checkbox"/> Mid-Size | <input type="checkbox"/> Crew Cab | <input type="checkbox"/> 1 Ton | <input type="checkbox"/> Swing Door | <input type="checkbox"/> 15 Passenger | <input type="checkbox"/> 6 Cylinder |
| <input type="checkbox"/> Full-Size | <input type="checkbox"/> Cab & Chassis | <input type="checkbox"/> Class 6 | <input type="checkbox"/> Utility Body ^A | <input type="checkbox"/> Tractor/Mower | <input type="checkbox"/> 8 Cylinder |
| <input type="checkbox"/> 2 Door | <input type="checkbox"/> 2 Wheel Drive | <input type="checkbox"/> Class 7 | <input type="checkbox"/> Flat Bed ^A | <input type="checkbox"/> Dual RW | <input type="checkbox"/> 10 Cylinder |
| <input type="checkbox"/> 4 Door | <input checked="" type="checkbox"/> 4 Wheel Drive ^B | <input type="checkbox"/> Class 8 | <input type="checkbox"/> Dump Truck ^A | <input type="checkbox"/> Single RW | <input type="checkbox"/> Other |

Additional description for vehicles or equipment: SEE ATTACHED PAPER

Front End Loader (CASE)
^B Please provide detailed justification on separate sheet.

****NOTE** If you need any additional equipment added to this order, please list all the different items. We will order everything we can as one package. This will minimize the turn around time when the new equipment comes in.**

9. What, if any, special options or accessories are required? Please check all appropriate options below and list any additional options on the lines below: i.e. lift gates, 50' telescopic boom, emergency lighting package, light-bar, 60" hydraulic rotary mower, etc. Please attach brochures if applicable:

All County vehicles are ordered with the following standard options: Air Conditioning, AM/FM Radio, Automatic Transmission, Rear Anti-Lock Brakes.

****See Next Page for the options****

For Fleet Use Only.			
Replacement Points: Maintenance-	<u>9.0</u>	Meter-	<u>5.0</u>
		Age-	<u>4.0</u>
		Total-	<u>15.0</u>
Initials <u>KS</u>		Date <u>12/12/03</u>	
Fleet # <u>04-101</u>			

10 Fleet 10/6/03 Parks 15:

LEE COUNTY GOVERNMENT, DIVISION OF FLEET MANAGEMENT
EQUIPMENT AND VEHICLE REQUEST FORM

(PLEASE PRINT OR TYPE)

1. Department/Division: (name) Parks and Recreation
(div.) _____

2. Requested By: (print) Joseph DeBacker

Phone #: 229-7367

3. Driver/Operator of this new piece of equipment: P & R Heavy Equipment Crew

4. Days and hours this piece of equipment will be used: M - F, 7 AM - 3:30 PM

5. Location the equipment will be parked: Heavy Equipment Yard @ Terry Park

6. Is this a replacement equipment or vehicle? Yes No

If yes: Asset #: 18370 Yr: 81 Make: Case Model: W20B Meter: 2759

7. What type of equipment or vehicle are you requesting?

Select all appropriate boxes:

- | | | | | | |
|---|---|----------------------------------|--|--|---|
| <input type="checkbox"/> Sedan | <input type="checkbox"/> Pickup truck | <input type="checkbox"/> ¼ Ton | <input type="checkbox"/> Van | <input type="checkbox"/> Excavator | <input type="checkbox"/> Gasoline |
| <input type="checkbox"/> Station Wagon | <input type="checkbox"/> Regular Cab | <input type="checkbox"/> ½ Ton | <input type="checkbox"/> Cargo | <input type="checkbox"/> 7 Passenger | <input type="checkbox"/> Diesel |
| <input type="checkbox"/> Sport Util Veh | <input type="checkbox"/> Extended Cab | <input type="checkbox"/> ¾ Ton | <input type="checkbox"/> Sliding Door | <input type="checkbox"/> 12 Passenger | <input type="checkbox"/> 4 Cylinder |
| <input type="checkbox"/> Mid-Size | <input type="checkbox"/> Crew Cab | <input type="checkbox"/> 1 Ton | <input type="checkbox"/> Swing Door | <input type="checkbox"/> 15 Passenger | <input type="checkbox"/> 6 Cylinder |
| <input type="checkbox"/> Full-Size | <input type="checkbox"/> Cab & Chassis | <input type="checkbox"/> Class 6 | <input type="checkbox"/> Utility Body ^A | <input type="checkbox"/> Tractor/Mower | <input type="checkbox"/> 8 Cylinder |
| <input type="checkbox"/> 2 Door | <input type="checkbox"/> 2 Wheel Drive | <input type="checkbox"/> Class 7 | <input type="checkbox"/> Flat Bed ^A | <input type="checkbox"/> Dual RW | <input type="checkbox"/> 10 Cylinder |
| <input type="checkbox"/> 4 Door | <input type="checkbox"/> 4 Wheel Drive ^B | <input type="checkbox"/> Class 8 | <input type="checkbox"/> Dump Truck ^A | <input type="checkbox"/> Single RW | <input checked="" type="checkbox"/> Other |

Additional description for vehicles or equipment: Case 521D/XT Articulated Wheel Loader. See Attached Brochure. With the 4 in 1 Bucket, Forks, and Jib Boom using the Hydraulic Quick Coupler system.

^B Please provide detailed justification on separate sheet.

No Enclosed CDs

****NOTE** If you need any additional equipment added to this order, please list all the different items. We will order everything we can as one package. This will minimize the turn around time when the new equipment comes in.**

8. What, if any, special options or accessories are required? Please check all appropriate options below and list any additional options on the lines below: i.e. lift gates, 50' telescopic boom, emergency lighting package, light-bar, 60" hydraulic rotary mower, etc. Please attach brochures if applicable:

All County vehicles are ordered with the following standard options: Air Conditioning, AM/FM Radio, Automatic Transmission, Rear Anti-Lock Brakes.

****See Next Page for the options****

For Fleet Use Only.			
Replacement Points: Maintenance-	<u>10.0</u>	Meter-	<u>1.8</u>
Age-	<u>5.0</u>	Total-	<u>15.0</u>
Initials	<u>KS 10/8/03</u>	Fleet Spec #	<u>04-007</u>

OCT 8 2003

Mark Anthony
561-762-1556

LEE COUNTY GOVERNMENT, DIVISION OF FLEET MANAGEMENT EQUIPMENT AND VEHICLE REQUEST FORM

(PLEASE PRINT OR TYPE)

Vehicles - Cars & Light Trucks:

- | | | | |
|---|--|---|--|
| <input type="checkbox"/> Cassette | <input type="checkbox"/> Plastic Bed-Liner | <input type="checkbox"/> Arrow Board ^A | <input type="checkbox"/> Strobe Light ^A |
| <input type="checkbox"/> CD Player | <input type="checkbox"/> Spray in bed liner | <input type="checkbox"/> Power Win/Locks | <input type="checkbox"/> 4-Corner Strobes |
| <input type="checkbox"/> Tires - All Terrain | <input type="checkbox"/> Long Bed | <input type="checkbox"/> Floor - Carpet | <input type="checkbox"/> Seats - Cloth |
| <input type="checkbox"/> Tow Package | <input type="checkbox"/> Short Bed | <input type="checkbox"/> Floor - Rubber | <input type="checkbox"/> Seats - Vinyl |
| <input type="checkbox"/> Trailer Hitch Receiver | <input type="checkbox"/> Cruise Control | <input type="checkbox"/> Tool boxes ^A | <input type="checkbox"/> Tinted Windows |
| <input type="checkbox"/> Limited Slip | <input type="checkbox"/> Tilt Steering Wheel | <input type="checkbox"/> Lockable Tailgate | <input type="checkbox"/> Camper Top ^A |
| <input type="checkbox"/> Back Up Alarm | <input type="checkbox"/> Cone Holder | <input type="checkbox"/> Security Alarm | <input type="checkbox"/> Auxiliary 12-Volt Plug ^A |
| <input type="checkbox"/> Work Lights | <input type="checkbox"/> Pipe Racks ^A | <input type="checkbox"/> Water Cooler Holder | <input type="checkbox"/> Steps ^A |
| <input type="checkbox"/> Mounted Winch ^A | <input type="checkbox"/> Bulk Fuel Tank W/Pump (Diesel or Unleaded) ^A | | |
| <input type="checkbox"/> Other. Please list: _____ | | | |

Farm Tractor:

- | | | | |
|--|--|--|--|
| <input type="checkbox"/> Three spool Hyd Valve | <input type="checkbox"/> Mounted Tool Box ^A | <input type="checkbox"/> Mounted Strobe Light ^A | <input type="checkbox"/> Tinted Windows |
| <input type="checkbox"/> Front Weights | <input type="checkbox"/> Rear Weights | <input type="checkbox"/> Flashing Work Lights | <input type="checkbox"/> Water Cooler Holder |
| <input type="checkbox"/> Auxiliary 12-volt Plug ^A | <input type="checkbox"/> 4-Corner Strobe Lights | <input type="checkbox"/> Cassette Radio | <input type="checkbox"/> AM/FM Radio |
| <input type="checkbox"/> AM/FM/CD Radio | | | |
| <input type="checkbox"/> Other. Please list: _____ | | | |

Trucks:

- | | | | |
|--|---|--|---|
| <input type="checkbox"/> Mounted Tool Box | <input type="checkbox"/> Mounted Strobe Light | <input type="checkbox"/> Tinted Windows | <input type="checkbox"/> Work Lights |
| <input type="checkbox"/> 4-Corner Strobe Lights | <input type="checkbox"/> Water Cooler Holder | <input type="checkbox"/> Fenders Over Rear Tires | <input type="checkbox"/> Flashing Work Lights |
| <input type="checkbox"/> Hyd Wet Line System | <input type="checkbox"/> AM/FM Radio | <input type="checkbox"/> Cassette Radio | <input type="checkbox"/> AM/FM/CD Radio |
| <input type="checkbox"/> Air Horns ^A | <input type="checkbox"/> Back Up Alarm | <input type="checkbox"/> Auxiliary 12-Volt Plug ^A | |
| <input type="checkbox"/> Other. Please list: _____ | | | |

9. What will be the primary use of the new equipment or vehicle? Load dump trucks and site work.

^A Specify Dimensions, Makes, Models, or Locations _____

OCT 8 2003

**LEE COUNTY GOVERNMENT, DIVISION OF FLEET MANAGEMENT
EQUIPMENT AND VEHICLE REQUEST FORM**

(PLEASE PRINT OR TYPE)

10. Funding source:

- Vehicle Replacement Fund
- Capital, Please Specify Account String _____
- Other, Please Specify Account String _____

KH 5722615500.506430
~~125191059401506430~~

VMB

If needed, please provide additional account strings: _____

11. We are authorizing a purchase not to exceed: \$ _____

Joseph DeBacker <i>DeBacker</i>	10/1/03	Mike Mulligan	10/2/03
REQUESTED BY	DATE	SUPERVISOR	DATE

Option 1: QUOTES AND REQUISITION. This option authorizes Fleet Management to obtain quotes and authorizes Fleet Management to issue a requisition using the account string(s) provided above.

Option 2: VEHICLE REPLACEMENT FUND PURCHASES. This option authorizes Fleet Management to obtain quotes and authorizes Fleet Management to purchase the equipment or vehicle using motor pool funds (formerly known as surcharge funds).

<i>King</i>	10/6/03	_____	_____
DEPARTMENT DIRECTOR	DATE	COUNTY MANAGER / DESIGNEE	DATE

SUBMIT THIS COMPLETED FORM TO FLEET MANAGEMENT

<i>Ken</i>	10/13/03	<i>Marilyn Rawling</i>	10/14/03
FLEET ACQ. SPECIALIST	DATE	FLEET MANAGER	DATE

For Fleet Use Only.

Price verification against State Contract and Sheriff's Contract.








Sole Source

Vendors Price \$ _____ State Contract \$ *N/A* Sheriff's Contract \$ *N/A*

OCT 8 2003

Equipment List

Property #:	18370
Asset Name:	LOADER
Make:	CASE
Model:	W20B
Model Number:	EV14
Year:	81
Serial Number:	9142972
License #:	N/A
Condition:	48
Mileage/Hours:	1952
Purchase Price:	\$0.00
Purchase Date:	1/1/81
Replacement Cost:	\$0.00
Projected Lifespan:	0
Date Updated:	3/10/99

 Close
 First
 Previous
 Next
 Last
 New
 Delete

Description: FRONTENDLOADER

Manager: MULLIGAN Supervisor: ~~FOOR~~ DeBecker
 Surchage: Still In Service?: Status: ACTIVE

Project/Cost Center Allocatio

Property #	Fund	Project #	Cost Center	Allocation
18370	155	0170	17	100

Allocation Total: 100

**EQUIPMENT/VEHICLE REQUEST FORM
CHECKLIST**

1. Check for correct name of Department/Division and for correct Department/Division number.
2. Check and list the Replacement Points in FASTER.
3. Double check for specifications, Options and Accessories. *attached*
4. Check Funding Source, double check the account strings for accuracy. Verify with department if necessary.
5. It is crucial to make sure the **not to exceed \$** is complete. If the purchase is going to exceed the dollar amount, ask the requestor to send us an e-mail, acknowledging and approving a new not to exceed purchase amount. *n/a*
6. **Option 1** Quote and Requisition or **Option 2** Vehicle Replacement Fund Purchases must be checked. *n/a*
7. Signatures Are Required.
 - a. Jim Lavender must sign for all Public Works requests.
 - b. John Yarbrough must sign for all Parks requests.
 - c. County Manager level authorization must be on all new (non-replacement) equipment requests.
8. Staple this checklist to the back of the Equipment and Vehicle Request form.
9. Give Request package to Danny.

Karen Shilling Date 10/8/03
Checklist Completed By

Danny Brashear - New loader

From: Joe DeBacker
To: Brashear, Danny
Date: 12/5/2003 12:06 PM
Subject: New loader
CC: Honnen, Ronald; Mulligan, Mike

Ron reminded me that one of the advantages to keeping the new loader order with Case is the fact we have a root rake for our Case 621 that will also attach to a Case 521. In some situations this smaller loader with the rake would be work better in terms of having a lower overhead clearance.
Thanks,

Joseph DeBacker
Lee Co. Parks and Recreation
Heavy Equipment Sr. Supv.
debackj@leegov.com
Phone: 239-461-7429
Mobile: 239-229-7367

JUSTIFICATION FOR SOLE SOURCE AND/OR WAIVER PURCHASE

REQUISITION NUMBER _____ DATE _____

DEPARTMENT _____ BUSINESS UNIT _____

SUGGESTED VENDOR

Briggs Equipment

ITEM DESCRIPTION AND REASON FOR SOLE SOURCE AND/OR WAIVER:
(MAY ALSO BE ATTACHED AS A MEMO)

*****See attached Memo*****

TECHNICAL CHARACTERISTICS:

REASON FOR REQUESTING SOLE SOURCE:

ITEM MUST MATCH EXISTING EQUIPMENT, WHICH IS:

Case Equipment

ITEM IS A REPAIR PART FOR EXISTING EQUIPMENT, WHICH IS:

ITEM IS TO BE ATTACHED TO EXISTING ITEM, WHICH IS:

Revision Date:

() TECHNICAL CHARACTERISTICS OF REQUESTED ITEM ARE ESSENTIAL TO OUR NEEDS BECAUSE:

() NO OTHER MANUFACTURER OF THIS TYPE OF PRODUCT EXISTS

() OTHER MANUFACTURERS OF THIS TYPE OF PRODUCT DO NOT MEET OUR MINIMUM REQUIREMENTS:

MANUFACTURER'S NAME: _____

REASON: _____

MANUFACTURER'S NAME: _____

REASON: _____

MANUFACTURER'S NAME: _____

REASON: _____

() OTHER _____

MUST PERFORM PRICE OR COST ANALYSIS OR ATTACH NEGOTIATED PRICE QUOTE FROM VENDOR; LETTER FROM MANUFACTURER STATING SOLE SOURCE.

A) PRICE ANALYSIS PERFORMED

BASED ON:

****See letter from vendor stating that Briggs Equipment is the only authorized Case dealership in Lee County and the surrounding areas for sales, parts, and service.**

*****See price quotes from Briggs Equipment for both loaders.**

Revision Date:

B) COST ANALYSIS PERFORMED:

BASED ON:

See attached sheets for details.

Marilyn O Rawlings 4/1/04

 SIGNATURE AND TITLE OF REQUESTER

I, *Robert D. Franceschini*, AUTHORIZED BUYER,
 CONCLUDE THE FOLLOWING:

SOLE SOURCE JUSTIFICATION IS ADEQUATE AND PURCHASE IS AUTHORIZED
 WITHOUT COMPETITIVE BIDDING.

SOLE SOURCE JUSTIFICATION IS INADEQUATE AND REQUISITION IS
 RETURNED TO DEPARTMENT.

DUE TO TIME RESTRAINTS PURCHASE IS AUTHORIZED WITHOUT
 COMPETITIVE BIDDING.

COMPETITIVE/NON-COMPETITIVE BID WAIVER APPROVED.

** Parks to Standardize*

M.D. Franceschini 4-15-04
 BUYER

James T. Sheehan 4-15-04
 PURCHASING DIRECTOR

CASE

ATTACHMENT #2

CASE CONSTRUCTION BUSINESS
CASE CORPORATION
700 STATE STREET
RACINE, WI 53404 USA
TEL: (262) 636-6011

March 3, 2004

Bob Franceschini
Purchasing Manager
Lee County Division of Purchasing
1825 Hendry Street
3rd Floor
Fort Myers, FL 33901

Dear Mr. Franceschini:

I am writing to inform you that Briggs Equipment is the only authorized Case dealership in Lee County and the surrounding areas for sales, parts, and service.

If you have any questions, please contact me at 813-907-0841.

Thanks for your consideration.

Sincerely,



Dave Gault
Case Business Manager

c: Mark Anthony
Jay Stafford



Danny Brashear
Lee County
Division of Fleet Management
2955 Van Buren Street
Fort Myers, Florida 33916

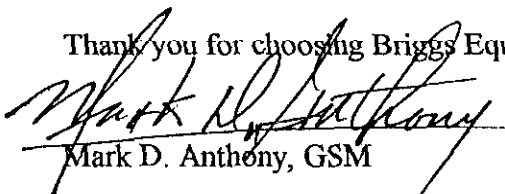
March 10, 2004

We are pleased to quote the following Case Industrial Product:

1 U65 Case 521D Tier II Wheel Loader		
2 BA Z-bar Loader Arm Linkage	104,331.00 (-36%)	66,772.00
3 CA Limited Slip Axles		in base
4 CA Tropical Cooling System	656.00 (-40%)	394.00
5 AA Standard Noise Suppression		in base
6 BA Canopy With ROPS		in base
7 AA Standard Steering System		in base
8 FA 3-spool, 2-lever controls	1,270.00	762.00
9 VB Mechanical Suspension Seat		in base
10DA Full Coverage, steps and fenders	1,096.00	658.00
11EN English Decals		in base
12DG 17.5x25 12PR Goodyear		in base
13AC ACS Pro Series 2000 Coupler	5,624.00	3,374.00
14MR Outside Mirrors	330.00	198.00
TD Rotating Amber Beacon	420.00	252.00
RC Ride Control	3,069.00	1,841.00
SC Transmission Side Covers	408.00	245.00
AV Anti-vandal cover for Control Panel	462.00	277.00
Case Price Page AA-4 4-in-1 Buckets		
#358105A1 4-in-1 coupler Bucket	11,390.00	6,834.00
Case Price Page AA-6 Forks for Wheel Loader		
#388513A1 Forks for coupler	5,280.00	3,168.00
Case Price Page AA-7 Material Handling Booms		
#124559A2 Boom for coupler	4,198.00	2,519.00
Operator, Parts and Tech Repair Manuals, 3 sets keys		in base
Case Price Page CE-71		
5 year, 5,000 Hour Full Machine Warranty	6,769.00	<u>4,061.00</u>

Selling Price: \$ 91,355.00
FOB Delivered

Thank you for choosing Briggs Equipment,


Mark D. Anthony, GSM



EQUIPMENT March 15, 2004

Danny Brashear
Lee County
Division of Fleet Management
2955 Van Buren Street
Fort Myers, Florida 33916

We are pleased to quote the following Case Industrial Product:

1 U66 Case model 621D Wheel Loader		
2 BA Standard Version	\$ 134,232.00 (-44%)	\$ 75,170.00
3 CA Limited Slip Differentials		in base
4 CA Tropical Cooling	656.00 (-40%)	394.00
5 BA Soundshield Sound Suppression	2,250.00	1,350.00
6 DA Enclosed Cab w/AC	8,599.00	5,159.00
7 AA Standard Steering		in base
8 FA 3-spool, 2-lever controls	1,270.00	762.00
9 RB Air Seat	390.00	234.00
10DA Full Coverage Fenders and Steps	1,096.00	658.00
11EN English Decals		in base
12HG 20.5x25, 12PR Goodyears		in base
13AC ACS Pro Series 2000 Coupler	5,624.00	3,374.00
14CA Standard Counterweight		in base
15RS AM/FM/Weatherband Radio	700.00	420.00
MR Outside Mirrors	330.00	198.00
TD Rotating Beacon	420.00	252.00
RC Ride Control	3,069.00	1,841.00
SC Transmission Side Covers	408.00	245.00
Case Price Page CE-71 Warranty		
5 year/5,000 hr. Full Machine Coverage	7,846.00	4,708.00
Case Price Page AA-6 4-in-1 buckets		
#358107A1 4-in-1 bucket for coupler	13,417.00	<u>8,050.00</u>

Selling Price: \$ 102,815.00
FOB Delivered

Thank you for choosing Briggs Equipment,

Mark D. Anthony, GSM

**EQUIPMENT HISTORY
COST & QTY PER METER**

ATTACHMENT #1

Report based on information from 2/1/2002 - 2/29/2004.
TOTALS FOR CLASS-G51D
Loader, Rubber Tire, Articulating, Diesel

Asset #	Year	Make	Model	Department	Current Odometer	Fuel CPM	Maint & Repair CPM	Accident CPM	Operating CPM	Total CPM
018370	1981	Case	W20B	PARKS 155	2771	0.000	28.875	0.000	28.875	28.875
018937	1987	Case	W14B	TOP S MOW	4163	0.447	23.471	0.347	23.918	24.266
030457	1990	Case	W14C	PARKS 155	1891	0.000	13.420	0.000	13.420	13.420
031814	1994	John Deere	544G	TOP CANAL	7681	0.115	23.618	0.068	23.733	23.800
031908	1997	John Deere	344G	SW DISP	2421	0.000	7.512	0.000	7.512	7.512
031985	1999	Case	721C	TOP RD CON	2416	0.810	8.980	0.000	9.790	9.790
031986	1999	Case	621C	PARKS 155	1314	0.000	11.358	0.595	11.358	11.953
045561	2003	Case	721D	TOP RD SHD	202	1.377	5.661	0.000	7.039	7.039
045565	2003	John Deere	270	UT CONST.	???	0.000	0.000	0.000	0.000	0.000
045568	2003	John Deere	710G	UT CONST.	???	0.000	0.000	0.000	0.000	0.000

Fleet Management doesn't maintain the last two John Deere loaders, asset# 045565 & 045568. Utilities has a contract with Nor Trax to do their work.

As you can see, 018370 is the oldest loader in the Fleet and is also the highest CPM. This loader has also met all the criteria for replacement with Fleet Management. The loader has 15-points (see below)

Age: 5.0	Based on 144 months of life. This loader has exceeded the expected life by 135 months.
Maintenance: 10.0	Based on 50% of the new purchased price of \$32,471.00. The maintenance cost is at \$56,088.23.
Meter: 2.8	Based on 5,000 hours of life. This loader has 2,771 hours on it.
Total: 17.8	Points stop counting at 15. When a vehicle reaches 15 points, this is the ultimate replacement time.

Asset #031814 is the only John Deere loader that DOT has. The maintenance cost has gone up to 93% of the new cost of the machine. It is also starting to have more down time than normal due to the age. This machine has 597.83 hours of down time in the past two years. Our average down time in the past two years for this same type machine is 303.88.

Age: 4.1	Based on 144 months of life. This loader has is in the 119th month but the maintenance is too high.
Maintenance: 9.3	Based on 50% of the new purchased price of \$73,705.00. The maintenance cost is at \$68,522.66.
Meter: 5.0	Based on 5,000 hours of life. This loader has 7,681 hours on it.
Total: 18.4	Points stop counting at 15. When a vehicle reaches 15 points, this is the ultimate replacement time.

Lee County Loader Information

Revised: March 17, 2004

All Current Active Loaders

Asset #	Year	Make	Model	Acquired Date	Number Of Months	Acquired Cost	LifeExp Months	MaintenanceLTD	Maintenance Cost Per Month
018370	1981	Case	W20B	1/1/1981	279	\$ 32,471.00	144	\$ 56,088.23	\$ 201.03
018937	1987	Case	W14B	1/1/1987	207	\$ 42,166.00	144	\$ 68,513.82	\$ 330.98
030457	1990	Case	W14B	1/1/1990	171	\$ 44,033.55	144	\$ 34,058.93	\$ 199.18
031814	1994	John Deere	544G	4/18/1994	119	\$ 73,705.00	144	\$ 68,196.83	\$ 573.08
031908	1997	John Deere	344G	9/25/1997	78	\$ 72,926.40	144	\$ 17,173.85	\$ 220.18
031985	1999	Case	721C	9/9/1999	54	\$ 112,737.00	144	\$ 25,084.23	\$ 464.52
031986	1999	Case	621C	9/9/1999	54	\$ 92,017.50	144	\$ 12,886.26	\$ 238.63
045561	2003	Case	721D	10/13/2003	5	\$ 118,784.98	144	\$ 1,229.35	\$ 245.87
045565	2003	John Deere	270	10/16/2003	5	\$ 41,584.04	144	Fleet doesn't maintain this equipment.	
045568	2003	John Deere	710G	11/4/2003	5	\$ 125,034.80	144	Fleet doesn't maintain this equipment.	
Totals					977	\$ 755,460.27	1,440	\$ 283,231.50	\$ 2,473.48

Average maintenance cost per month: **\$ 309.19**

John Deere Loaders

Asset #	Year	Make	Model	Acquired Date	Number Of Months	Acquired Cost	LifeExp Months	MaintenanceLTD	Maintenance Cost Per Month
031814	1994	John Deere	544G	4/18/1994	119	\$ 73,705.00	144	\$ 68,196.83	\$ 573.08
031908	1997	John Deere	344G	9/25/1997	78	\$ 72,926.40	144	\$ 17,173.85	\$ 220.18
045565	2003	John Deere	270	10/16/2003	5	\$ 41,584.04	144	Fleet doesn't maintain this equipment.	
045568	2003	John Deere	710G	11/4/2003	5	\$ 125,034.80	144	Fleet doesn't maintain this equipment.	
Totals					207	\$ 313,250.24	576	\$ 85,370.68	\$ 793.26

Average maintenance cost per month for John Deere: **\$ 396.63**

Case Loaders

Asset #	Year	Make	Model	Acquired Date	Number Of Months	Acquired Cost	LifeExp Months	MaintenanceLTD	Maintenance Cost Per Month	Sold Date
018370	1981	Case	W20B	1/1/1981	279	\$ 32,471.00	144	\$ 56,088.23	\$ 201.03	
018937	1987	Case	W14B	1/1/1987	207	\$ 42,166.00	144	\$ 68,513.82	\$ 330.98	
019272	1991	Case	W14C	1/1/1991	159	\$ 49,585.00	144	\$ 42,712.06	\$ 268.63	2/21/2004
030457	1990	Case	W14B	1/1/1990	171	\$ 44,033.55	144	\$ 34,058.93	\$ 199.18	
031985	1999	Case	721C	9/9/1999	54	\$ 112,737.00	144	\$ 25,084.23	\$ 464.52	
031986	1999	Case	621C	9/9/1999	54	\$ 92,017.50	144	\$ 12,886.26	\$ 238.63	
045561	2003	Case	721D	10/13/2003	5	\$ 118,784.98	144	\$ 1,229.35	\$ 245.87	
Totals					770	\$ 491,795.03	1,008	\$ 240,572.88	\$ 1,948.85	

Average maintenance cost per month for Case: **\$ 278.41**

FIAT Loaders

<u>Asset #</u>	<u>Year</u>	<u>Make</u>	<u>Model</u>	<u>Acquired Date</u>	<u>Number Of Months</u>	<u>Acquired Cost</u>	<u>LifeExp Months</u>	<u>MaintenanceLTD</u>	<u>Maintenance Cost Per Month</u>	<u>Sold Date</u>
018654	1984	FIAT	FR15	7/1/1984	172	\$ 78,175.00	144	\$ 52,748.63	\$ 306.68	12/11/1999
018655	1984	FIAT	FR15	7/1/1984	186	\$ 78,175.00	144	\$ 65,733.55	\$ 353.41	1/26/2002
Totals					358	\$ 156,350.00	288	\$ 118,482.18	\$ 660.08	

Average maintenance cost per month for FIAT: **\$ 330.04**