



City of San Antonio Certificate of Exemption

Finance

Please fill this form out online, attach any required support documents, and forward your request to next approval authority.

FY210136

Certificate of Exemption

Originating Department: Building and Equipment Services

Request Date: 01/26/2021

Exemption Requested/Taken

The City is authorized under limited conditions to make procurements outside of the competitive solicitation process. Chapter 252 of the Local Government Code provides guidance regarding sixteen general exemptions from the competitive solicitation. Departments must submit vendor(s) quotations for any selection below. Please select one exemption:

<input type="checkbox"/> A procurement made because of a public calamity that requires funds to relieve the needs of the residents or to preserve city property (Note: Department must notify the Purchasing Division immediately regarding such an event)	<input type="checkbox"/> Paving, drainage, street widening and other public improvements or related matter where at least one-third of the costs are paid by special assessments
<input type="checkbox"/> A procurement to preserve or protect the public health or safety of the city's residents (Note: Department must notify the Purchasing Division immediately regarding such an event)	<input type="checkbox"/> A public improvement project which has been authorized but for which there is deficiency of funds to complete in accordance with the plans as authorized
<input type="checkbox"/> A procurement necessary because of unforeseen damage to machinery, equipment or other property (Note: Department must notify the Purchasing Division immediately regarding such an event)	<input type="checkbox"/> A payment under a contract by which a developer participates in the construction of a public improvement as provided by Subchap. C, Ch 212.
<input type="checkbox"/> A procurement for personal, professional or planning services	<input type="checkbox"/> Personal property sold
<input type="checkbox"/> A procurement for work that is performed and paid for by the day as the work progresses	<input type="checkbox"/> Services performed by blind or severely disabled persons
<input type="checkbox"/> A purchase of land or right-of-way	<input type="checkbox"/> Goods purchased by a municipality for subsequent retail sale by the municipality
<input checked="" type="checkbox"/> A procurement of items available for sale to the public	<input type="checkbox"/> Electricity
<input type="checkbox"/> A purchase of rare books, papers and other materials for a public library	<input type="checkbox"/> Advertising, other than legal notices

***Is this an "Emergency" purchase request that exceeds \$50,000 in value and would require City Council ratification?** Yes No

***Sourcing Accounting Details** Insert Shopping Cart (SC) or Purchase Requisition (PR) # Insert Annual Contract #

Enter: Annual Contract Name/Number: Existing Contract: 4400003664 / 4600013662 RFO#6100007287; New A/C 4400006104



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Sole Source Justification Notice

You have indicated that this Certificate of Exemption is being requested for a purchase that is categorized as a "Sole Source" procurement. Justification for such a purchase **MUST be provided in the following section of the form, where the justification for sole source purchase can be documented and submitted as part of this Certificate of Exemption request.** Provide any vendor-provided documents used in justifying the sole source aspects of this purchase, attaching any correspondence(s) related to establishing that justification.

Click on the paperclip icon  located in the left margin of this form to make any required attachment.

Sole Source Justification Details

*Name of Item: HVAC Building Automation Systems (BAS) Controls Support

*Manufacturer: Automated Logic Co. *Model Number: Various

*Source Count: Available from only one source Available from more than one source

*Name of Source: Automated Logic Co. (ALC)

*Brief description of where or how the item(s) will be used:

ALC will provide system support and perform periodic preventive maintenance services to ensure peak performance of the Heating Ventilation and Air Conditioning (HVAC) system controls through the Building Automation System (BAS) at seven (7) City facilities. The agreement includes quarterly site visits for performing diagnostic assessments.

*Describe the performance functions proprietary to the item(s) requested and why they are necessary to accomplish the project:

The ALC technicians are factory trained and certified to perform the necessary adjustments on the BAS as required, and will also provide system upgrades in accordance with the manufacturer's recommendations. Using ALC trained and certified technicians also prevents voiding any manufacturer's warranties on existing system components.

*Will the item be used in conjunction with existing equipment? Yes No

*Will it be used as a component to be interfaced with existing equipment? Yes No

*What is the brand and model number of existing equipment?

Automated Logic Co. / various model numbers

*Will this be used as an accessory or option? Yes No

*Will training be required? Yes No

*Name other sources/brands whose products have been evaluated and why they do not meet requirements:

Johnson Controls - Metysis BAS control system Not compatible with the existing ALC BAS control system
Trane Co. - Summit BAS control system Not compatible with the existing ALC BAS control system
Schneider - Andover BAS control system Not compatible with the existing ALC BAS control system

*Required attachment(s): **Vendor Quotation and Sole Source Vendor Justification Letter explaining why requested item(s) are only suitable from one source.**

*Has all of the required justification documentation been attached to this request? Yes No

Execution/Filing Details

This Certificate of Exemption is executed and filed with the Finance Department as follows:

1. The undersigned is authorized to approve an exemption;



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2. An exemption according to Section 252.022 of the Local Government Code exists.

More specifically, the following event has occurred:

The HVAC Building Automation Systems (BAS) controls that are utilized at designated City facilities are required to be maintained, serviced, and upgraded only by authorized Automated Logic Company system specialists that are factory trained and certified to perform repairs and adjustments on the BAS in accordance with the manufacturer's recommended warranty requirements.

3. Because the exemption stated above exists, the City of San Antonio intends to contract with

Automated Logic Co. which will cost approximately \$ \$135,511

Approvals	
<u>Ron Griego (BES)</u> Originator	<u>01/26/2021</u> Date
 Department Director Approval	<u>01/26/21</u> Date
 Executive Leadership Team Approval <small>(approval required only for ratification by City Council)</small>	<u>1/26/21</u> Date
<u>Laura Sambrano</u> Procurement Administrator Approval	<u>4.12.2021</u> Date

To send this approval document to the next approver, press **Send Forward**.
To retain a copy of this request, perform a **Save As** to save it as an electronic form.