



# City of Santa Fe, New Mexico

# memo

**Date:** April 16, 2015

**To:** Public Utilities Committee/Finance Committee/City Council

**Via:** Nick Schiavo, Public Utilities Department and Water Division Director <sup>NSA</sup>  
Robert Rodarte, Purchasing Officer *[Signature]*  
Shannon Jones, Wastewater Management Division Director *[Signature]*

**From:** Luis Orozco, Wastewater Management Plant Superintendent *[Signature]*

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## **ITEM AND ISSUE:**

**Subject:** Procurement of service, repairs and equipment from James, Cooke and Hobson (JCH) over \$50,000.

## **BACKGROUND AND SUMMARY:**

The WWMD has received approval from the Purchasing Department to have James, Cooke and Hobson for Exemption 18.1.7 K in the Purchasing Manual. James Cooke and Hobson (JCH) is the authorized distributor representative for the following vendors: CLA-VAL Automatic Control Valves, Xylem Water Solutions/Flygt, Santitare Aeration Equipment, Gardner Denver/Hoffman Blowers and Netzsch for 2015-2016 fiscal year.

The Wastewater Management Division uses JCH for service, repair and replacement of equipment from all the above mentioned vendors. The service, repairs or purchase of equipment from JCH is critical in keeping the Wastewater Treatment Facility (WWTF) plus the Wastewater Lift Stations in the City of Santa Fe operating to meet Federal, State and Local regulations required in the NPDES Permit.

The WWMD is now seeking approval from the Governing Body to be able to procure the service, repairs or equipment over \$50,000.

## **ACTION REQUESTED:**

Please approve the procurement of Service, Repairs and Equipment over \$50,000 with JCH for 2015-2016 fiscal year.

## **ATTACHMENTS:**

1. City of Santa Fe Procurement Checklist
2. JCH for Exemption 18.1.7 K Approval Letter.
3. Vendor Letters for JCH as the authorized distributor representative.

## CITY OF SANTA FE PROCUREMENT CHECKLIST

Contractor Name: James, Cooke and Hobson (JCH)

Procurement Title: Service, Repair and Equipment over \$50,000

Solicitation RFP/RFB#: \_\_\_\_\_

Other Methods: State Price Agreement ☐ Cooperative ☐ Sole Source ☐ Exempt ☒ Other ☐ \_\_\_\_\_

Department Requesting/Staff Member Public Utilities/Wastewater/ Luis Orozco

### Procurement Requirements:

*A procurement file shall be maintained for all contracts, regardless of the method of procurement. The procurement file shall contain the basis on which the award is made, all submitted bids and proposals, all evaluation materials, score sheets, quotations and all other documentation related to or prepared in conjunction with evaluation, negotiation, and the award process. The procurement shall contain a written determination from the Requesting Department, signed by the procurement officer, setting forth the reasoning for the contract award decision before submitting to the Committees. .*

### SOLICITATION\*

YES	N/A	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Project Beginning History (council requests etc)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Budget Determination (FIR) attach
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Solicitation document (RFP, IFB),
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Screen print of legal solicitation published in newspapers, web sites, etc.:
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Screen print of addendum(s) published on the IPB/RFP:
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pre-Bid/Pre-Offer Conference attendance sheet and other documents
<input type="checkbox"/>	<input checked="" type="checkbox"/>	If canceled, screen print of cancellation of solicitation notice
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other: <u>Requests For Bids</u>

### EVALUATION\*

YES	N/A	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Blank evaluation form
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Evaluator's names and profiles
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Evaluation procedures or evaluation instructions
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Conflict/Confidentiality Forms signed by all Evaluators, Technical Advisors, Reviewers, and any person who assists in regard to the bid/proposal, evaluation and/or award
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bid or Offer opening sheet(s) (If RFP, then two offer opening sheets, one for technical and one for cost)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Screen print of Bidder/Offeror's detailed information
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Responsiveness review sheet or other sheet documenting responsiveness for each Bidder/Offeror, attach requests for additional information to cure items
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Non-Responsive/Non-Responsibility Form and correspondence or letters from Department to vendor regarding disqualifications
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Oral presentations (sign-in sheets, presentation materials, etc.)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Documentation sent to Bidders/Offerors and responses received regarding clarifications, decisions, negotiations, and/or best and final offers, etc.
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reference Reviews/Reference Check Questionnaires
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Individual evaluations included for each RFP.
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pricing evaluation
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Final overall evaluation matrix or summary of evaluator scores
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other: _____

\*

**AWARD\*****YES      N/A**

- |                          |                                     |  |
|--------------------------|-------------------------------------|--|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Fully executed Memo to Committees from the Department with recommendation of award           |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Winning proposal (this is a copy that has all confidential/proprietary information excluded) |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Screen print of Contract Award Notice  |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Screen print of Award Notice published on agency website                                     |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Email or notification sent to all Bidders/Offerors that award was made                       |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Waiver or "No Action Taken" from Procurement Office  |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Correspondence with Procurement Office regarding waiver                                      |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | If IFB and not awarded to lowest responsive, responsible bidder; written explanation         |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Other: _____   |

**DISCLOSURES****YES      N/A**

- |   |                                     |  |
|---|-------------------------------------|--|
| <b>Contractor Disclosures &amp; Conflicts of Interest</b> |                                     |  |
| <input type="checkbox"/>                                  | <input checked="" type="checkbox"/> | Disclosures & Conflicts of Interest Form(s) (winning bidder(s)/offeror(s))               |
| <b>Contractor –Conflicts of Interest</b>                  |                                     |  |
| <input type="checkbox"/>                                  | <input checked="" type="checkbox"/> | Purchasing Office Letter or e-mail to designated individual regarding potential conflict |
| <input type="checkbox"/>                                  | <input checked="" type="checkbox"/> | Conflict of Interest Form signed by all parties  |
| <input type="checkbox"/>                                  | <input checked="" type="checkbox"/> | Letter from Procurement Office regarding the potential conflict                          |
| <b>Subcontractor Disclosures</b>                          |                                     |  |
| <input type="checkbox"/>                                  | <input checked="" type="checkbox"/> | Disclosures & Conflicts of Interest form of Subcontractor(s)                             |
| <b>Subcontractor –Conflicts of Interest</b>               |                                     |  |
| <input type="checkbox"/>                                  | <input checked="" type="checkbox"/> | Purchasing Officer Letter or email to designated individual regarding potential conflict |
| <input type="checkbox"/>                                  | <input checked="" type="checkbox"/> | Conflict of Interest form signed by all parties  |
| <input type="checkbox"/>                                  | <input checked="" type="checkbox"/> | Letter from Legal Office regarding the potential conflict                                |
| <input type="checkbox"/>                                  | <input checked="" type="checkbox"/> | Other: _____   |

**CONTRACT****YES      N/A**

- |                          |                                     |   |
|--------------------------|-------------------------------------|---|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Copy of Executed Contract                             |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Copy of all documentation presented to the Committees |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Finalized Council Committee Minutes                   |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Other: _____  |

**MISCELLANEOUS FILE\*****YES      N/A**

- |                                     |                                     |  |
|-------------------------------------|-------------------------------------|--|
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Local Preference Form  |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | New Mexico Residence Form                                      |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Veterans Exemption   |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Sole Source determination form approved by Procurement Officer |
| <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Exempt determination memo approved by Procurement Officer      |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | Other: _____   |

Include all other substantive documents and records of communication that pertain to the procurement and any resulting contract.

**PROTEST (If applicable)\***

YES N/A

☐  
☐  
☐  
☐

☒  
☒  
☒  
☒

Documentation from protester filed with the Purchasing Office  
Letter from Department to Purchasing Office Providing response to protest  
Letter from Purchasing Officer to protester and Department on final outcome  
Other: \_\_\_\_\_

**Create a separate file folder which may contain any documents with trade secrets or other competitively sensitive, confidential or proprietary information.**

YES N/A

☐  
☐

☒  
☒

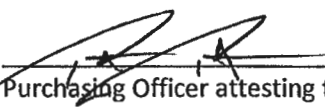
Original bid(s) or proposal(s) with no redactions.  
Documentation exempt - Proprietary, Confidential, Competitively Sensitive, or Trade Secret (i.e. e-mails, proposals, letters)

Luis Orozco, WWM Plant Superintendent

Department Rep Printed Name and Title



Department Rep Signature attesting that all information included

 4/22/15  
Purchasing Officer attesting that all information is reviewed

# City of Santa Fe, New Mexico

# memo

Date: March 25, 2015

To: Robert Rodarte  
Purchasing Officer

From: Luis Orozco, WWM Plant Superintendent



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## **ITEM AND ISSUE:**

Representative/Distributor James, Cooke and Hobson, Inc. for Exemption 18.1.7 K

## **BACKGROUND AND SUMMARY:**

The Wastewater Management Division is requesting approval of Exemption 18.1.7 K from the Purchasing Manual (Purchase of parts and labor or maintenance agreements to repair disabled equipment or machinery if the equipment or machinery is repaired by a franchised dealer or by a factory authorized repair shop) for James, Cooke and Hobson, Inc. (JCH) in Albuquerque as the Authorized Representative/Distributor for service, repair or the procurement of Sanitaire Aeration Equipment, CLA-VAL Automatic Control Valves, Hoffman Blowers, Netzsch and Flygt pumps, mixers, electrical, instrumentation and mechanical parts, including control panels and cabinets for 2015-2016 fiscal year.

The WWTP has Sanitaire Aeration Diffusers that are in the Bio-selectors and Aeration Basins, CLA-VAL Automatic Control Valves hold and maintain pressure in certain sludge or non-potable water lines, Hoffman Blowers that provide air to the Bio-selector and Aeration through the Sanitaire Aeration Diffusers, Netzsch and Flygt equipment in operation that at one point or another require maintenance, service, repairs or replacement of the equipment that are used in the daily process.

## **ACTION REQUESTED:**

James, Cooke and Hobson, Inc. to be approved for Exemption 18.1.7 K of the Purchasing Manual, for service, repair or the procurement of Sanitaire Aeration Equipment, CLA-VAL Automatic Control Valves, Hoffman Blowers, Netzsch and Flygt pumps, mixers, electrical, instrumentation and mechanical parts, including control panels, cabinets for 2015-2016 fiscal year.

☒ Approved:

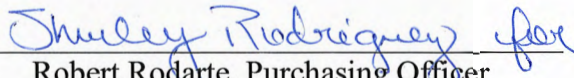
☐ Disapproved:

  
Shannon Jones, WWM Division Director

3/25/15  
Date

☒ Approved:

☐ Disapproved:

  
Robert Rodarte, Purchasing Officer

03/26/15  
Date

**ATTACHMENTS:**

1. JCH Vendor Letters from:

- CLA-VAL Automatic Control Valves
- Xylem Water Solutions for Flygt Products
- Sanitaire Aeration Equipment
- Gardner Denver for Hoffman Blowers
- Netzsch



CLA-VAL AUTOMATIC CONTROL VALVES

March 18, 2015

Luis Orozco  
WWTP Supt.  
Santa Fe WWTP  
23 Paseo Real  
Santa Fe, NM 87507

This is to advise that Cla-Val Company, located in Costa Mesa, California, has appointed James, Cooke Hobson, Inc. as the sole authorized representative for all Cla-Val products in New Mexico.

As are exclusive agent they are responsible for handling the sales and service of all product lines sold under the name of Cla-Val for the State of New Mexico as well as surrounding areas.

Yours truly,

Louis D. Antos – Regional Sales Engineer

.....  
*FLUID CONTROL AT IT'S BEST*





Mark A Shaw  
SE Territory Manager  
Xylem Inc  
Flygt Products

766 N Sandy LN  
Elkhorn WI 53121  
Cell 262 227 3763

mark.shaw@xyleminc.com

March 17, 2015

Re: Flygt, a Xylem Water Solutions company

To: Santa Fe WWTP  
Mr. Luis Orozco  
73 Paseo Real  
Santa Fe, NM 87507

Xylem Water Solutions, Flygt brand (Flygt) is the manufacturer of Flygt pumps and parts for your wastewater process. All equipment, components and parts associated with your Flygt equipment should originate from Flygt's Factories.

Flygt, A Xylem brand solely uses James, Cooke and Hobson as it's only authorized representation/direct distributor in New Mexico, Arizona and parts of Nevada and Texas territories. All inquiries regarding Flygt equipment and parts as well as service should be routed through James, Cooke and Hobson. Below is their contact information.

This letter is in affect through an indefinite period as per their contract. If there are any changes to James, Cooke and Hobson's contract; Flygt a Xylem brand will provide written notice.

James, Cooke & Hobson  
3810 Academy Park South NE  
Albuquerque NM 87109  
Phone (505) 344- 7100

If there are any questions concerning the above statement please feel free to contact me

Sincerely,

*Mark A Shaw*

SE Territory Manager



**Scott Mulinix, P.E.**  
**Territory Manager**

**Xylem Water & Wastewater**  
Sanitaire Products

9333 N. 49<sup>th</sup> Street  
Brown Deer, WI 53223 USA  
Tel 414 365 2200  
Fax 414 365 2210

March 20, 2015

Luis Orozco  
WWTP Superintendent  
Santa Fe WWTP  
73 Paseo Real  
Santa Fe, NM 87507

Re: JCH Representative Memo

Mr. Orozco,

This letter is to confirm that James, Cooke & Hobson, Inc. (JCH) is the exclusive representative for Sanitaire Aeration Equipment including parts, service, and new equipment in the State of New Mexico.

Please let us know if there are any questions or concerns.

Scott Mulinix, P.E.  
Xylem – Sanitaire | Territory Manager  
scott.mulinix@xyleminc.com



March 21, 2015

Re: Sole Source Status

To: Mr. Luis Orozco, WWT Superintendent  
Santa Fe WWTP  
73 Paseo Real  
Santa Fe, New Mexico 87507

Please be advised that **James, Cooke & Hobson** is the exclusive representative for centrifugal blowers in the Water / Wastewater Treatment market segment in the States of Arizona and New Mexico for Gardner Denver Nash. As such, Hoffman and Lamson multistage centrifugal blowers, Hoffman Revolution high speed turbo blowers, Turbotron regenerative blowers, blower accessories, parts and service are available for quotation and purchase only **James, Cooke & Hobson** for this market and territory

Gardner Denver Nash is the sole owner and manufacturer of Lamson and Hoffman multistage centrifugal blowers, Hoffman Revolution high speed turbo blowers, and Turbotron regenerative blowers and parts for those blowers.

Orders may be placed directly with Gardner Denver Nash or with James, Cooke & Hobson.

Gardner Denver mailing address for orders is:

Gardner Denver  
100 Gardner Park  
Peachtree City, GA 30269

If you have any questions, please contact me directly.

Sincerely,

A handwritten signature in blue ink that reads 'Keith E. Collins'.

Keith E. Collins  
Market Manager, CF Products

March 17, 2015

Mr. Luis Orozco  
Santa Fe WWTP  
73 Paseo Real  
Santa Fe, NM 87507

Dear Mr. Orozco,

James, Cooke, & Hobson, Inc., (JCH) is the sole factory authorized distributor for all Netzsch pumps in the state of New Mexico, for the markets they serve, which includes municipal water and waste treatment facilities. This includes our NEMO progressing cavity pumps, TORNADO rotary lobe pumps, parts, and service.

All inquiries for pumps or replacement parts should be directed to JCH and all customers from New Mexico contacting our factory in Exton, PA are referred to JCH.

Please do not hesitate to contact me if you should have any questions.

With Regards,

Jeff Helm  
Regional Sales Manager  
Western States  
Netzsch Pumps North America, LLC