

DEPARTMENTAL INPUT
CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION

New
 OTR
 Sole Source
 Bid Waiver
 Emergency
 Previous Contract/Project No. 8517-0/18
 Contract
 Re-Bid
 Other
 LIVING WAGE APPLIES: YES NO
 Requisition No./Project No.: RQID1700088
 TERM OF CONTRACT 8 YEAR(S) WITH 0 YEAR(S) OTR

Requisition /Project Title: Engine Oil, Lubricant Fluids & Diesel Fuel Services

Description: The purpose of this solicitation is to establish a contract for the purchase of Engine Oil, Lubricant Fluids, and Diesel Fuel Analysis Services

Issuing Department: DTPW & ISD
 Contact Person: Jesus Valderrama
 Phone: 786-469-5291
 Estimate Cost: \$1,073,383.91
 Funding Source: DTPW Operating and Internal Service Funds

ANALYSIS

Commodity Codes:	<u>405</u>	Contract/Project History of previous purchases three (3) years		
		Check here <input type="checkbox"/> if this is a new contract/purchase with no previous history.		
		EXISTING	2ND YEAR	3RD YEAR
Contractor:	<u>Ana Laboratories, Inc.</u>			
Small Business Enterprise:				
Contract Value:	<u>\$1,309,000.00</u>	<u>\$</u>	<u>\$</u>	<u>\$</u>

Comments: _____

Continued on another page (s): YES NO

RECOMMENDATIONS

	Set-aside	Sub-contractor goal	Bid preference	Selection factor
SBE				

Basis of recommendation: _____

Signed: Lourdes Betancourt
 Date sent to SBD: 05/16/2017
 Date returned to DPM: _____

SECTION 2 - SPECIAL TERMS AND CONDITIONS**2.1 PURPOSE**

The purpose of this solicitation is to establish a contract for the purchase of engine oil, lubricant fluids, and Diesel Fuel Analysis Services for the Department of Transportation and Public Works (DTPW) and the Internal Services Department (ISD).

2.2 TERM OF CONTRACT

This contract shall commence on the first calendar day of the month succeeding approval of the contract by the Board of County Commissioners, or designee, unless otherwise stipulated in the Notice of Award Letter which is distributed by the County's Internal Services Department, Procurement Management Division; and contingent upon the completion and submittal of all required bid documents. The contract shall expire on the last day of the last month of the five (5) year period.

2.3 METHOD OF AWARD**A. METHOD OF AWARD**

Award of this contract will be made to the lowest priced responsive, responsible Vendor.

B. MINIMUM REQUIREMENT

Two (2) references to demonstrate that the Vendor is regularly engaged and has sufficient experience and expertise in the oil, lubricant, and diesel analysis services for mass transit agencies. The references listed must be customers that are currently receiving or have received from the Vendor in the past three (3) years the services described in this solicitation. The references must include the Mass Transit Agency's Name, and the name, title, address, e-mail, and telephone number of the contact person who can verify that the Vendor has successfully provided the services that the Vendor is offering under this solicitation. These references shall ascertain to the County's satisfaction that the Vendor has sufficient experience and expertise in the oil, lubricant and diesel analysis services for mass transit agencies.

2.4 PRICES

Prices shall remain fixed and firm during the term of contract.

2.5 REGULAR TURNAROUND TIME REQUIREMENTS SHALL BE FORTY-EIGHT (48) HOURS FROM THE TIME SAMPLE IS DELIVERED

The Vendor shall make deliveries of all reports within forty-eight (48) hours from the time sample is delivered. All deliveries shall be made in accordance with good commercial practice and all required delivery timeframes shall be adhered to by the Vendor; except in such cases where the delivery will be delayed due to acts of nature, strikes, or other causes beyond the control of the Vendor. In these cases, the Vendor shall notify the County of the delays in advance of the original delivery date so that a revised delivery schedule can be appropriately considered by the County.

Note: DTPW and ISD reserve the right to change turnaround times to accommodate future operational requirements. Should the turnaround times be changed, the County will negotiate any reasonable adjustments to the price with the Vendor.

2.6 AVAILABILITY OF CONTRACT TO OTHER COUNTY DEPARTMENTS

It is hereby agreed and understood that any County department or agency may avail itself of this contract.

2.7 ANALYSIS OF OTHER OILS/FLUIDS/FUELS NOT LISTED ON THIS BID SOLICITATION BASED ON PRICE QUOTES

While the County has listed all major items within this solicitation which are utilized by County departments in conjunction with their operations, there may be similar items that must be analyzed by the County during the term of this contract. Under these circumstances, a County representative will contact the Vendor to obtain a price quote for the similar items. The County reserves the right to award these similar items to the Vendor.

SECTION 3 – TECHNICAL SPECIFICATIONS

3.1 INTEGRATED ENGINE OIL, LUBRICANT FLUIDS, AND DIESEL FUEL ANALYSIS SERVICE

These bid specifications shall provide DTPW's Bus Maintenance Division with an integrated Engine Oil, Lubricant Fluids, and Diesel Fuel Analysis Service. The analysis services are required to test oils, fluids and fuel for potential maintenance problems and to confirm that the qualities of products in use are in compliance with DTPW, Original Equipment Manufacturer (OEM) and industry specifications. The testing of oils, fluids, and fuel will improve DTPW's component performance and reliability. The analysis services will identify and analyze levels of contamination and abnormal wear patterns. This service is necessary for engine, diesel, transmission, differential, hydraulic fan drive, and power steering pump maintenance on all DTPW buses.

All services required for the Engine Oil, Lubricant Fluids, and Diesel Fuel Analysis Service shall include cost of training, analysis, testing, reporting, consultation, pick-up of samples via large package delivery company (i.e., UPS or FedEx), all supplies to include but not limited to sample bottles/containers, sampling pumps/guns, probalizers, identification tags/labels, plastic bags, and mailing boxes/tubes plus Vendor's pre-printed and pre-paid mailing address labels and any other costs to provide the services.

DTPW Bus Maintenance will ship fluid samples to the Vendor for analysis. Testing shall include:

- A. Testing of used oil and lubricants for the purpose of avoiding severe malfunction and/or failure on fleet engines, transmissions, hybrid drives, differentials and hydraulic components.
- B. Testing of new oil and lubricants for the purpose of confirming quality of product meets DTPW and industry specifications.
- C. Testing of diesel fuel deliveries for the purpose of assuring quality of product and to ensure that products are in compliance with specifications.

The DTPW Chief of Performance Analysis Division and/or designee(s) is the main point of contact and liaison between the Vendor and the Bus Maintenance Division for this service contract.

3.2 SUPPORT REQUIREMENT

The Vendor shall provide support (i.e., be available to discuss service & testing results) to the Engine Oil, Lubricant Fluids and Diesel Fuel Analysis Service on a full time basis from the Vendor's location. The Vendor shall be available to provide support Monday through Friday between the hours of 7:30AM to 3:30PM local time in Miami-Dade County, excluding County holidays and weekends.

3.3 ON-SITE TRAINING

The Vendor shall provide a minimum of four (4) training sessions at DTPW during the term of the contract at the times agreed between DTPW and the Vendor. Typical size of 20 participants at a location and time designated by DTPW lead training instructor which will be identified after contract award. Each training session shall be at least two (2) hours long.

Training will include but is not limited to the following:

- Sampling basics/techniques-how to correctly take oil sampling and avoid contamination
- Packaging and shipping of sample bottles

- Data interpretation
- Synthetic vs. non-synthetic
- Recent performance requirements, change and trend
- Oil analysis basics and requirements
- Corrective actions
- Lubricant oils basics-base oil, formulation, additives and technology, etc.
- Power train systems/lubricant basic and maintenance requirements

An exact copy of the training presentation, in Microsoft PowerPoint, shall be provided to the DTPW lead training instructor, at no additional cost, prior to the first training session, as a permanent record and for future usage by DTPW. If, during the life of the Contract, processes or any technical items change or are modified by either the Vendor or DTPW, two (2) additional training sessions shall be delivered by the Vendor in conjunction with an updated copy of the training presentation for future usage by DTPW at no cost.

3.4 **SAMPLES**

Samples for analysis shall consist of:

1. Diesel Fuel
2. Engine Oil
3. Transmission Fluid
4. Hydraulic Fluid
5. Power Steering Fluid
6. Differential Fluid
7. Other Fluids on an as required basis and as determined by DTPW.

Vendor shall retain unused portion of all samples for thirty (30) days from date of receipt so that subsequent tests can be made if required. After thirty (30) days, all samples may be disposed of by the Vendor at no cost to DTPW, in accordance with applicable Federal, State and Local waste disposal regulations. Upon a written request from the DTPW Chief of Performance Analysis Division and/or designee(s), the Vendor may be required to keep samples for longer than thirty (30) days.

3.5 **REQUIRED ANALYSIS**

A. ENGINE OIL-USED

- a. Required spectro-chemical analysis of engine oils using ASTM D6595 or ASTM D5185 ICP shall identify each of the following trace elements parts per million:

Aluminum, Antimony, Barium, Boron, Calcium, Cadmium, Chromium, Copper, Iron, Lead, Manganese, Magnesium, Molybdenum, Nickel, Phosphorus, Silicon, Silver, Sodium, Titanium, Potassium, Lithium, Tin, Vanadium and Zinc.

- b. Elements not present shall be indicated by <1ppm, zero or N/A.
- c. Required physical property test shall identify:
 1. % water by volume (ASTM D6304 or ASTM E203)
 2. Fuel dilution by gas chromatography (ASTM D3524)
 3. Total Base Number (TBN) (ASTM D2896 or D4739)
 4. Kinematics' Viscosity at 100 degrees C. (ASTM-D-445)
 5. Soot, % solids by volume
 6. Glycol (ASTM D2982)
 7. SAE/ISO Grade

B. TRANSMISSION, HYDRAULIC AND POWER STEERING FLUID (SYNTHETIC – TRANSYND TES 295) – USED

- a. Required spectro-chemical analysis of transmission, hydraulic and power steering fluids using ASTM D6595 or ASTM D5185 ICP shall identify each of the following trace elements parts per million:

Aluminum, Antimony, Barium, Boron, Calcium, Cadmium, Chromium, Copper, Iron, Lead, Manganese, Magnesium, Molybdenum, Nickel, Phosphorus, Silicon, Silver, Sodium, Titanium, Potassium, Lithium, Tin and Zinc.

- b. Elements not present shall be indicated by <1ppm, zero or N/A.
- c. Required physical property tests shall identify:
 1. % Water by volume (ASTM D6304 or ASTM E203)
 2. Total Acid Number (TAN) (ASTM-D 974)
 3. Kinematics' Viscosity at 100 degrees C. (ASTM-D445)
 4. Glycol (ASTM D2982)
 5. Solids percentage (%) by volume

C. DIFFERENTIAL OIL (SYNTHETIC 80W140) – USED

- a. Required spectro-chemical analysis of oils using ASTM D6595 or ASTM D5185 ICP shall identify each of the following trace elements parts per million:

Aluminum, Antimony, Barium, Boron, Calcium, Cadmium, Chromium, Copper, Iron, Lead, Manganese, Magnesium, Molybdenum, Nickel, Phosphorus, Silicon, Silver, Sodium, Titanium, Potassium, Lithium, Tin and Zinc.

- b. Elements not present shall be indicated by "N/A" or zero.
- c. Required physical property tests shall identify:
 - i. % Water by volume % Water by volume (ASTM D6304 or ASTM E203)
 - ii. Total Acid Number (TAN) (ASTM-D 974)
 - iii. Kinematics' Viscosity at 100 degrees C. (ASTM-D445)
 - iv. Solids percentage (%) by volume

D. ENGINE OIL-NEW PRODUCT (BULK DELIVERY) TESTING FOR SPECIFICATION COMPLIANCE

In addition to capturing the required physical properties test listed above (paragraph 3.5.B.c. 1 - 7), the following test will be required:

1. Flash Point, deg C (ASTM D92)
2. Viscosity @ 100 deg C, cST (ASTM D445)
3. Viscosity Index (ASTM 2270)
4. HT/HS Viscosity, cP@150 deg C (ASTM D4683)
5. Sulfated Ash, % (ASTM D874)

E. TRANSMISSION, HYDRAULIC AND POWER STEERING FLUID (SYNTHETIC – TRANSYND TES 295) AND DIFFERENTIAL OIL (SYNTHETIC 80W140) NEW

Occasionally, new transmission, hydraulic, power steering fluid and differential oil may be submitted for analysis. The fluid/oil manufacturer's specifications will be submitted along with the sample. The analysis will verify the sample meets the manufacturer's submitted specifications.

F. DIESEL FUEL

Required testing of new diesel fuel shall include:

1. Sulfur content (ASTM-D-2622 or D5453)
2. Water (ASTM D6304 or ASTM E203)
3. Sediment (ASTM-D2276 OR 5452)
4. BTU/LM (ASTM-D4868)
5. Cetane index (ASTM-D4737)
6. Distillation (ASTM-D-86)
7. API Gravity at 60 degrees F (ASTM D287)
8. Specific gravity at 60 degrees F (ASTM D1298)
9. Flash Point (ASTM D93)
10. Lubricity (ASTM D6079)
11. Fuel Stability (ASTM D2274)
12. Ash (ASTM D482)

3.6 REPORTING

The required reporting system shall consist of Individual Unit Reports, Critical Reports, Summary Batch Reports (upon request), Monthly Reports, and Quarterly Exception Reports. All reports shall be electronically mailed, available on-line (electronic data transfer), and capable of downloading.

The Vendor shall:

- a. Prepare and distribute to DTPW Chief of Performance Analysis Division and/or Maintenance Reliability Clerk or designee(s) analysis reports for all samples tested. All reports shall identify the bus number, test results, analysis and recommendations based on critical limits established by DTPW for each type of lubricant.
- b. Review and analyze reports for unusual/abnormal results and/or parameters (extremely high wear metals, drastic change in oil condition, etc.) and notify DTPW of results immediately.
- c. Prepare (as requested) and submit ad hoc trend analysis reports.
- d. Have and maintain a web site with a Report Database that can be viewed by all necessary DTPW parties of all buses, and bulk samples tested.

- e. Contact the lubricant manufacturer's directly and obtain additional analytical information, such as but not limited to product updates and changes that would impact lubricant physical and chemical property requirements, as required from DTPW's various lubricants, engine and transmission vendors as needed (information and points of contact to be provided at later date by the County).

A. Individual Unit Reports shall:

1. Contain analytical results in numerical values, prior history and laboratory analysis maintenance recommendations. Component Manufacturer, Oil Type, Unit ID #, Component S/N, Status, Component Model #.
2. Be submitted within 48 hours upon receipt of samples. The report shall be e-mailed to the Chief of Performance Analysis Division and/or designee(s):

Carlos De La Torre
Phone: (786) 469-5326
Fax: (786) 469-5580
e-mail: Carlos.DeLaTorre@miamidade.gov

3. Be derived from cumulative computer files on each unit.
4. Accompany each batch of Individual Unit Reports.
5. Contain an analysis of results with possible causes and detailed recommendations for corrective action.
6. When requested, Summary Batch Reports shall accompany each batch of Individual Unit Reports.

B. On-line reports should include the following capabilities:

1. Sorting by severity code, status, Unit ID (Bus or Rail Car Number), date of sample, Division of work site, analysis number.
2. Graphical analysis and charting to identify trends.
3. Charts for comparing equipment and vehicles.
4. Search function to identify specific problems such as: coolant or fuel contamination, soot, or other problem.
5. Calculate and graph wear levels for a specific unit.
6. Graphic display of specific fleet.
7. Units overdue for analysis.
8. Search function to identify the top twenty (20) buses or rail cars including division of work site with the most frequent critical (C) status only, and the specific reasons/problems causing this critical status such as high coolant, exceeding the critical point for fuel contamination, soot, iron, lead, silicone, copper, and viscosity at 100 degrees Celsius.

C. Monthly Reports

The Vendor shall submit a consolidated monthly report to the DTPW Chief of Performance Analysis Division and/or Maintenance Reliability Clerk or designee(s), detailing all sample test dates, special testing and the total breakout of samples by type (engine, transmission, differential, hydraulic, and diesel fuel). The report shall be provided each month for the preceding month.

D. Quarterly Exception Reports

Provide a quarterly exception report to the DTPW Chief of Performance Analysis Division and/or designee(s) containing a list of buses that have not been sampled in compliance with the scheduled DTPW sampling intervals. The report shall be provided each quarter for the preceding quarter.

E. Critical Reports

Critical reports shall be clearly identified. In case of alarming conditions, the Chief of Performance Analysis Division and/or designee(s) shall be contacted immediately by telephone (Sandy Amores, Phone: (786) 469-5326).

Critical Reports can be for Individual Units or groups of units. When critical reports are e-mailed, they shall be distinguished from routine reports so as to alert the Chief of Performance Analysis Division and/or designee(s).

3.7 SOFTWARE AND HARDWARE

The Vendor shall supply access to oil analysis reports via internet in a Secure Socket Layer (SSL) encrypted web-site. Reports shall be in Microsoft Office 2010 compatible Excel format. DTPW users shall have unique logins giving them access to export reports that can be loaded on DTPW file servers. The Vendor(s) shall ensure 99.99% uptime through server redundancy to ensure business continuity. DTPW users requiring assistance with login lockouts or account issues shall have access to support Vendor's personnel from 9AM to 5PM local time in Miami-Dade County.

3.8 PICK UP AND PROCESSING OF SAMPLES

At no additional cost, the Vendor shall arrange for pick-up via large package delivery company (i.e., UPS or FedEx), of samples on a daily basis from:

DTPW Materials Management Warehouse
3401 NW 31 Street
Miami FL 33142

3.9 SUPPLIES

The Vendor shall ensure that DTPW is furnished with adequate supply of materials to support the Lubricant and Diesel Fuel Analysis Services. At no additional cost, the materials to be supplied by the Vendor during the contract period are:

- a. 2,000 (two thousand) sampling bottles/containers at the beginning of the contract. Sample containers submitted for analysis are to be replaced on a one for one basis, every month.
- b. 2,000 pre-affixed identification tags/labels for sample containers at the beginning of the contract. Pre-affixed identification tags/labels for sample containers are to be replenished one for one basis, every month.
- c. 2,000 Probalizer needles at the beginning of the contract. Probalizer needles are to be replenished one for one basis, every month.

- d. 15 Sampling pumps/guns and any other attachments to obtain oil samples at the beginning of the contract. Sampling pumps/guns and any other attachments are to be replaced when damaged or inoperable through the contract period.
- e. Plastic bags for shipping samples.
- f. UPS or FedEx shipping boxes, mailing tubes and packaging materials. In addition, the Vendor's pre-printed pre-paid mailing labels to include name, mailing address and account information.

3.10 IDENTIFICATION TAGS/LABELS

A. The identification tag or label shall contain spaces for information as indicated below:

Bus # _____

Division _____

Date of Sample _____

Oil Type _____

Oil time _____

Mileage _____

If sample labels are not completed properly, the Vendor shall contact the DTPW Chief of Performance Analysis Division and/or Maintenance Reliability Clerk or designee(s) for additional information via e-mail. When cloudy or milky samples are received, Vendor shall call the DTPW Chief of Performance Analysis Division and/or Maintenance Reliability Clerk or designee(s).

Carlos De La Torre
Phone: (786) 469-5336
Fax: (786) 469-5578
e-mail: Carlos.DeLaTorre@miamidade.gov.

3.11 CONSULTATION

Consultation, if required, shall be available from the Vendor as to lubricant quality and diesel fuel selection. Consultation shall comprise of, but not limited to, the provisions of:

- a. Assistance with specifications, selection, formulation and blending as well as evaluation of proper lubricants and fuel.
- b. Direction for program modification and tailoring to meet specific needs as they may arise.
- c. A toll free number or the acceptance of collect calls from the DTPW contact person.

SOLICITATION TITLE:

SOLICITATION NO.: