


MEMORANDUM

**CITY OF CAPE CORAL
PUBLIC WORKS DEPARTMENT**

TO: Mark Mason, Financial Services Director
Wanda Roop, Procurement Manager

FROM: Damon Grant, Interim Public Works Deputy Director 

DATE: October 19, 2023

SUBJECT: Kelly Tractor – Vendor# 1729
Purchase Order Requisition for
Caterpillar Equipment Repairs & Maintenance

Background

Kelly Tractor is a Sole Source vendor for the City of Cape Coral. They are the only authorized dealer for all Caterpillar machines, engines, and parts for 13 Counties in Florida including Lee. They provide Caterpillar factory trained technicians and Caterpillar factory parts. Also, they perform Caterpillar factory warranty & extended warranty repairs which benefits any new Caterpillar branded equipment that has been added to the City's fleet.

Recommendation

Fleet Services would like to open a purchase order for Kelly Tractor in the amount up to \$49,000. This purchase order will cover anticipated maintenance and repair of Caterpillar branded equipment in the City of Cape Coral's Fleet for FY 2024.

Funding Availability

AFS Funding is available through Fleet's Internal Service Fund-Fleet Operations Business Unit 516.30511.534120 (Outside Services). These costs are then billed to the department that owns the asset.

DG/va

Attachments:

Kelly Tractor Sole Source Form FY24
Kelly Tractor Sole Source Letter FY24

c: AJ Forbes, Fleet Manager *AJFORBES*
Milagros Rosario, Senior Buyer

CITY OF CAPE CORAL
REQUEST FOR SOLE SOURCE OR SINGLE SOURCE PURCHASE

Requesting Department: PUBLIC WORKS - FLEET SERVICES

Vendor Name: Kelly Tractor Company

Address: 9651 Kelly Tractor Drive, Ft. Myers FL 33905

Phone: 239-693-9233 E-Mail: Christopher.Messier@kellytractor.com

Price: \$49,000.00 Account: 516-30511-534120-30 (Outside Services) Fund: Fleet ISF

Description of item to be procured:
Parts & Repairs for Caterpillar branded equipment.

1.) Uniqueness of vendor's item/service. How is this vendor the only vendor uniquely qualified to provide the product or service:

Kelly Tractor is the authorized dealer/distributor for Caterpillar machines, engines and parts for Lee and surrounding counties in the state of Florida. They also maintain an inventory of replacements parts and a staff of factory-trained technicians to repair Caterpillar machinery.

2.) Market Research. Describe other, similar sources or products available in the market, if any, and why they are not acceptable:

Kelly Tractor is the sole source distributor of Caterpillar products in Lee County.

3.) Proposed Actions. Describe the actions the department will take to overcome the present barriers to competition for any future acquisition of this product or service:

Fleet Services will continue to research vendors that can maintain and repair Caterpillar Branded equipment to ensure that the city receives the best value.

Fleet Manager's Signature: AGTORBES Date: 10/23/2023

Interim Public Works Deputy Director's Signature: [Signature] Date: 10/24/2023

Approval: Procurement Manager [Signature] (not to exceed \$50,000.00) Date: 10/26/23

Approval: City Manager _____ (not to exceed \$100,000.00) Date: _____

Council authorization required if exceeding \$100,000.00



Caterpillar Inc.

100 NE Adams Street
Peoria, IL 61629

October, 2023

Sir or Ma'am:

This letter is to confirm that Kelly Tractor Co is the exclusive authorized dealer for all Caterpillar machines, engines and parts for the following 13 Counties in Florida:

| | | |
|--------------|------------|------------|
| Monroe | Miami-Dade | Charlotte |
| Collier | Broward | Palm Beach |
| Okeechobee | Lee | Hendry |
| Martin | St. Lucie | Glades |
| Indian River | | |

As an authorized Caterpillar distributor, Kelly Tractor Co maintains an inventory of replacement parts and a staff of factory-trained technicians to provide support services to users of Caterpillar products.

Although, on occasion, others parts suppliers attempt to represent themselves as genuine Caterpillar parts suppliers, genuine Caterpillar parts are sold exclusively through authorized Caterpillar dealers and distributors.

Thank you for your business and please feel free to give me a call if you have any questions or need further clarification.

Sincerely,

Caroline Fisher

Caroline Fisher
Caterpillar Inc. – Atlanta District
Global Construction & Infrastructure
(309) 258-3341