

Pre-Submittal Meeting

**CITY OF PHOENIX
REQUEST FOR QUALIFICATIONS**

STREET TRANSPORTATION DEPARTMENT

**CITYWIDE
GENERAL MECHANICAL AND PLUMBING SERVICES
JOB ORDER CONTRACT**

**PROCUREPHX PRODUCT CATEGORY CODE 912000000
RFx 6000001459**

August 31, 2023



Welcome and Introductions

Kathleen Kennedy, Contracts Specialist II

Point of Contact for Submittals and RFQ Questions

Office of the City Engineer

kathleen.kennedy@phoenix.gov

(602) 534-5789

Ruth Spear, Mechanical Engineer, Project Manager

Street Transportation Department

Donald N. Mayes, Equal Opportunity Director (Presenting)

Equal Opportunity Department

business.relations.eod@phoenix.gov

POC-Karina Matthiessen - (602)261-8873



Agenda

- Meeting Overview
- Vendor Registration
- EOD Overview and SBE Program Requirements
- Project Description and Scope of Work
- Statement of Qualifications Evaluation Criteria
- Statement of Qualifications Submittal Requirements
- ProcurePHX and RFx Electronic Submittal
- Important Dates: *Selection Schedule*
- Questions?



Meeting Overview

- ❑ Sign-in please
- ❑ Sign-in sheet and PowerPoint will be posted City of Phoenix's ProcurePHX system (RFx: 6000001459):
<https://eprocurement.phoenix.gov/irj/portal>

- ❑ And on Procurement's website:

<https://www.phoenix.gov/streets/procurement-opportunities>

Click on **respective project**, then click on:

- RFQ ■ **Notification** (if applicable)

It is your responsibility as an RFQ holder to determine, prior to submittal, if any **Notifications** have been issued



- ❑ Please hold questions until Q&A period
- ❑ This is the **ONLY** opportunity to discuss this project with City staff



Vendor Registration

- ❑ All Firms **MUST** Be Registered in the Vendor Management System **PRIOR TO SUBMITTING A PROPOSAL**

- ❑ **New Firms** – After registering, the City will send an e-mail with a vendor **number** approx. **2 days**

- ❑ Information on how to register with the City is available at:
 - <https://www.phoenix.gov/finance/vendorsreg>



Equal Opportunity Department

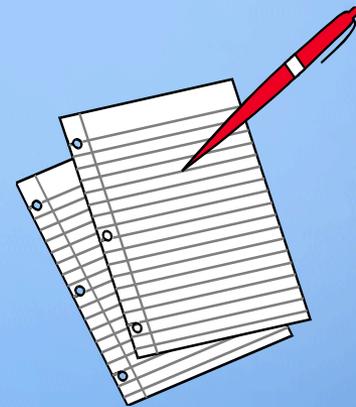
POINT OF CONTACT

Karina Matthiessen, EO Specialist

Equal Opportunity Department

business.relations.eod@phoenix.gov

(602) 262-7716



SBE Program

- ❑ Phoenix Mayor and City Council have a long standing commitment to fostering the participation of small businesses in all aspects of the City's contracting efforts.
- ❑ The City of Phoenix strives to advance the economic growth of small businesses through its **Small Business Enterprise (SBE) Program**.



SBE Program

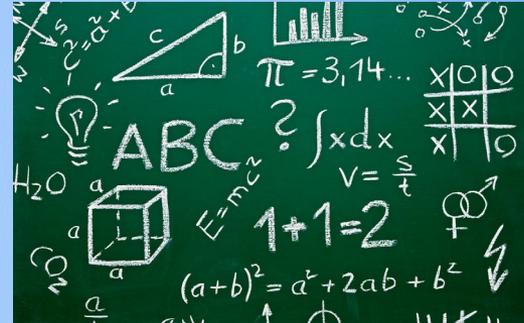
The Equal Opportunity Department is responsible for ensuring contractors and consultants achieve full compliance with all requirements related to the Small Business Enterprise (SBE) Program:

- Solicitation
- Bid Verification
- Subcontractors Approval
- Compliance Monitoring
- Sanctions and Penalties



SBE Program

Required SBE Goal: 2.00%



1. At time of JOA: $\frac{\text{Proposed \$ to SBEs}}{\text{Total JOA Value}}$

2. Annual Reviews: $\frac{\text{Total Countable \$ Paid to SBEs}}{\text{Total Payment on all JOAs During Year}}$

3. At time of Completion: $\frac{\text{Total Countable \$ Paid to SBEs}}{\text{Total Payment on Contract}}$



SBE Program

SBE Requirements @ Solicitation:
None!

SBE Requirements Post-Award:
Use SBEs and Report

All proposed SBE Subcontractors must be listed in Phoenix SBE Directory and certified in specified scopes of work at the time of performance.

We can't count what we can't monitor. Share with EOD the ***Proposed Statement of SBE Utilization*** at beginning of each JOA.

Eligible SBEs can be found at:
www.phoenix.diversitycompliance.com



SMALL BUSINESS SUB-CONTRACTING GOAL

- SBE REQUIREMENT IS 2%
- THIS SOLICITATION IS OPEN TO ALL FIRMS
- NO SBE DOCUMENTS DUE AT THIS TIME
- SBE DOCUMENTS DUE TO EOD AT JOA CONTRACT TIME



Equal Opportunity Department

For more information, please contact:



Karina Matthiessen
EO Specialist
(602) 262-7716

Email:
business.relations.eod@phoenix.gov



Scope of Work

- Repair, replacement and/or installation of equipment and piping as required by HVAC systems (fan coils, chillers, air handlers, towers, pumps, boilers, etc.)
- Installation and/or replacement of domestic and site utility plumbing systems consisting of drain, waste, vent (DWV) and sewer piping using various approved materials and connection methods.
- Installation and/or replacement of natural gas piping systems below grade, within structures and exterior locations using approved materials and connection methods for each location.



Scope of Work (Cont.)

- ❑ Installation and/or replacement of hot and cold domestic water piping systems using approved connection methods and materials.
- ❑ Installation and/or replacement of storm or rain water piping systems located within buildings, below grade or exposed locations using approved materials and connection methods; pipe hanging and support methods.
- ❑ Installation or replacement of hazardous production materials (HPM) or chemical waste piping using stainless steel tubing polyvinylidene fluoride (PVDF), polypropylene piping (PP) or other approved materials and connections methods (Fuseal etc.).



Scope of Work (Cont.)

- ❑ Installation and/or replacement of plumbing fixtures including water closets, showers, urinals, etc. and their disabled access (ADA) requirements.
- ❑ Installation and/or replacement of grease traps and interceptors including sand-oil interceptors and chemical waste clarifiers.
- ❑ Installation and/or replacement of mixing valves, shut-off valves, water hammer arrestors, trap primers, freeze protection and anti-scald valves, and expansion tanks etc.
- ❑ Cooling tower cleaning, cooling tower fill replacement, chiller annual service.



Scope of Work (Cont.)

- Stationary air handling units and vane axial supply fans.
- Centrifugal water pumps on chilled, condenser and hot water heating systems, centrifugal pump service.
- Package air conditioning units and heat pumps.
- Piping headers and branch lines on all hydronic systems.
- Gas fired or electrical hot water heaters, gas fired or electrical boilers and furnaces.
- Domestic water booster systems.



Scope of Work (Cont.)

- HVAC system balancing, HVAC airside equipment installation or replacement.
- Chilled or hot water piping system gate valves.
- Insulation.
- The following may be included: minor design services, sheet metal design, minor demolition, all associated electrical work, sizing and installation, crane and rigging for installation and removal of equipment, testing and start-up of installed equipment and systems.



Scope of Work (Cont.)

- ❑ Knowledge of and compliance with current City of Phoenix adopted plumbing and mechanical codes.
- ❑ All other work as it relates to this JOC, and work incidental to this JOC.



QUESTIONS?



Statement of Qualifications Criteria

- A. General Information (150 points)
- B. Experience and qualifications of Firm (250 points)
- C. Experience of the Key Personnel to be Assigned (250 points)
- D. Approach to Performing the Required Services (350 points)
- E. Reference Check (21 points*)
 - Provide responses in the order listed in the RFQ
 - Be complete, be concise



Statement of Qualifications Submittal

- All Firms **MUST** be registered in the Vendor Management System to **SUBMIT** a Proposal
- If your firm is already registered with the City of Phoenix's ProcurePHX system, to login and access the electronic solicitation visit:
<https://eprocurement.phoenix.gov/irj/portal>
- Product Category Code is: **912000000**
- RFx Number is: **6000001459**
- The **VENDOR NUMBER** is to be included on the cover of the Statement Of Qualifications



Statement of Qualifications Submittal (Cont.)

- Information Sheet (firm name, address, phone, contact info, email, signature of contact person, vendor number, project title & number, RFx number). Firm logo is optional. Category code not required on the Information Sheet. **Do not include any additional information.**
- Please make sure to use your legal name on the front cover page and information sheet. Your firm name should match what is listed with the Arizona Corporation Commission.
- MAXIMUM pages permitted is **12 pages**:



Statement of Qualifications Submittal (cont.)

- ❑ Each page side with criteria information will be counted.
- ❑ Pages that have photos, charts, and graphs will be counted toward maximum number of pages.
- ❑ Information Sheet, front and back covers, Table of Contents and tab dividers will NOT be counted toward the maximum page limit, **UNLESS** they include information that may be considered by the selection panel.



Statement of Qualifications Submittal (cont.)

- Submit Electronically via ProcurePHX System:**

<https://eprocurement.phoenix.gov/irj/portal>

- SOQ due:**

**12:00pm Noon – Phoenix time
Friday, September 15, 2023**



Selection Process

- Each SOQ will be evaluated according to the evaluation criteria in the RFQ
- Up to five contractors may be selected
- A contract will be executed upon completion of negotiations of contract terms and City Council approval



Grounds for Disqualification

- ✓ **Failure to submit electronically through the ProcurePHX online portal by the due date and time.**
- ✓ **Violating “Contact with City Employees” policy.**
- ✓ **Failure to provide bonding statement**



Selection Schedule

- SOQs Due September 15, 2023
- Scope Meeting November 2023



Procurement WEBPAGE

<https://www.phoenix.gov/streets/procurement-opportunities>

- Current Opportunities – Project Specific RFQs / CFBs
- Addenda / Notifications (if any)
- Pre-Submittal Sign-in Sheet and Power Point Presentation
- Awards / Results
- Bidders Handbook – *Step-by-step Guide to RFx Submittals*

The ProcurePHX online portal will be used for Professional Services Solicitations

<https://eprocurement.phoenix.gov/irj/portal>



Questions After Today

E-mail your questions to:

kathleen.kennedy@phoenix.gov

Kathleen Kennedy, Contracts Specialist II
(602) 534-5789

Thank you for your interest in this project!!!

*If you would like a brief overview of the RFX system,
please stay!*



RFx Electronic Submittals

Log in to ProcurePHX portal:

<https://eprocurement.phoenix.gov/irj/portal>

Select RFx and Auctions tab on the Ribbon

You will be taken to the RFx (Event) Landing Page

SAP

◀ Back Forward ▶ History Favorites Personalize View Help

RFx and Auctions Administration Messages

Home Create Users Own Data Company Data

Administration > Home

Thank you for your interest in becoming a vendor in the
As a Vendor Administrator for your company you have



RFx Electronic Submittals

Click the **Refresh** Button on the RFx (Event) Landing Page to see the most current information

Find the solicitation you'd like to view from the list, by RFx (Event) Number.

RFx and Auctions Administration Messages

Overview

RFx and Auctions > Overview > RFx and Auctions

Active Queries

eRFxs [All \(7\)](#) [Published \(1\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

eAuctions [All \(0\)](#) [Published \(0\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

eRFxs - All

[Show Quick Criteria Maintenance](#)

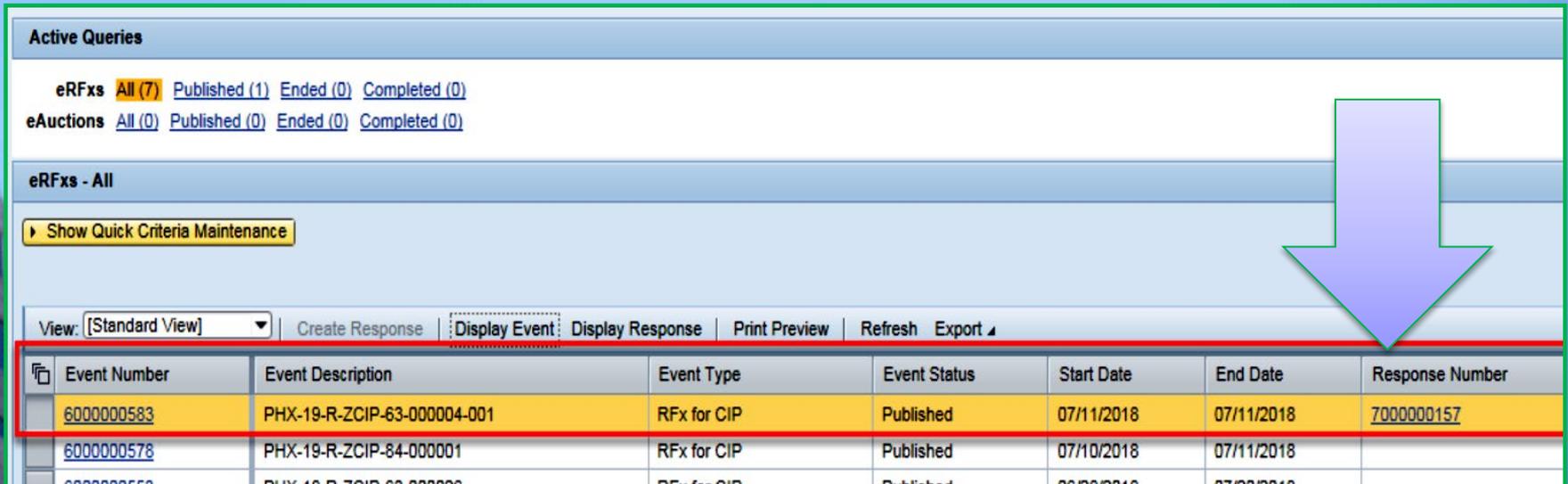
View: [Standard View] | Create Response | Display Event | Display Response | Print Preview | **Refresh** Ex

Event Number	Event Description	Event Type	Event Sta
6000000583	PHX-19-R-ZCIP-63-000004-001	RFx for CIP	Published



RFx Electronic Submittals

- ❖ The RFx (Event) Landing Page is also where you can find your saved RFx response.
- ❖ Locate the desired RFx (Event) Number, and scroll to the right. You will see your RFx response number shown as a hyperlink.
- ❖ Click on the hyperlink, a new window will pop up to allow you to edit your RFx response.



Active Queries

eRFxs [All \(7\)](#) [Published \(1\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

eAuctions [All \(0\)](#) [Published \(0\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

eRFxs - All

Show Quick Criteria Maintenance

View: [Standard View] Create Response Display Event Display Response Print Preview Refresh Export

Event Number	Event Description	Event Type	Event Status	Start Date	End Date	Response Number
6000000583	PHX-19-R-ZCIP-63-000004-001	RFx for CIP	Published	07/11/2018	07/11/2018	7000000157
6000000578	PHX-19-R-ZCIP-84-000001	RFx for CIP	Published	07/10/2018	07/11/2018	
6000000559	PHX-19-R-ZCIP-63-000003	RFx for CIP	Published	06/28/2018	07/23/2018	



RFX Electronic Submittals

Click the gray box next to the RFX (Event) Number you'd like to view. Then,

Click **Display Event**

This will open a new window to view the selected RFX

If you don't see the new window, check your pop-up blocker

RFX and Auctions Administration Messages

Overview

RFX and Auctions > Overview > RFX and Auctions

Active Queries

eRFxs [All \(7\)](#) [Published \(1\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

eAuctions [All \(0\)](#) [Published \(0\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

eRFxs - All

[Show Quick Criteria Maintenance](#)

View: [Standard View] | [Create Response](#) [Display Event](#) [Display Re](#)

Event Number	Event Description
6000000583	PHX-19-R-ZCIP-63-000004-001
6000000578	PHX-19-R-ZCIP-84-000001



RFX Electronic Submittals

Update your **Participation Status** accordingly

Clicking Participate will allow you to get email notifications regarding your RFX Event, i.e. Notifications, New attachments.

Review **RFX Information** Tab for Start/Due dates/ Title of Solicitation

Display RFX :

Print Preview |  | Close Participate Do Not Participate Tentative Create Response

RFX Number 6000000583 Smart Number PHX-19-R-ZCIP-63-000004-001 RFX Status
RFX Version Type Active Version

RFX Information Items Notes and Attachments

RFX Parameters Questions Notes and Attachments Table Extensions

Time Zone: MSTNO

* Start Date: 07/11/2018 13:30:00

* Submission Deadline: 07/11/2018 14:00:00

Opening Date: 07/11/2018 14:00:00

Currency: USD

* Title: SOILS AND MATERIALS TESTING ON-CALL SERVICES CALENDAR Y



RFX Electronic Submittals

Click **Create Response**

Review **Items** Tab for
RFQ Evaluation Category
Yes/No questions

Review **Notes and
Attachments** Tab for
RFQ and Notifications

Display RFX :

Print Preview |  | Close | Do Not Participate | Tentative | **Create Response** | Questions and Answers (

You have been registered. You will be informed of RFX changes

RFX Number 6000000583 Smart Number PHX-19-R-ZCIP-63-000004-001 RFX Status Published
RFX Version Type Active Version

RFX Information | **Items** | **Notes and Attachments**

RFX Parameters | Questions | **Notes and Attachments** | Table Extensions

Time Zone: MSTNO

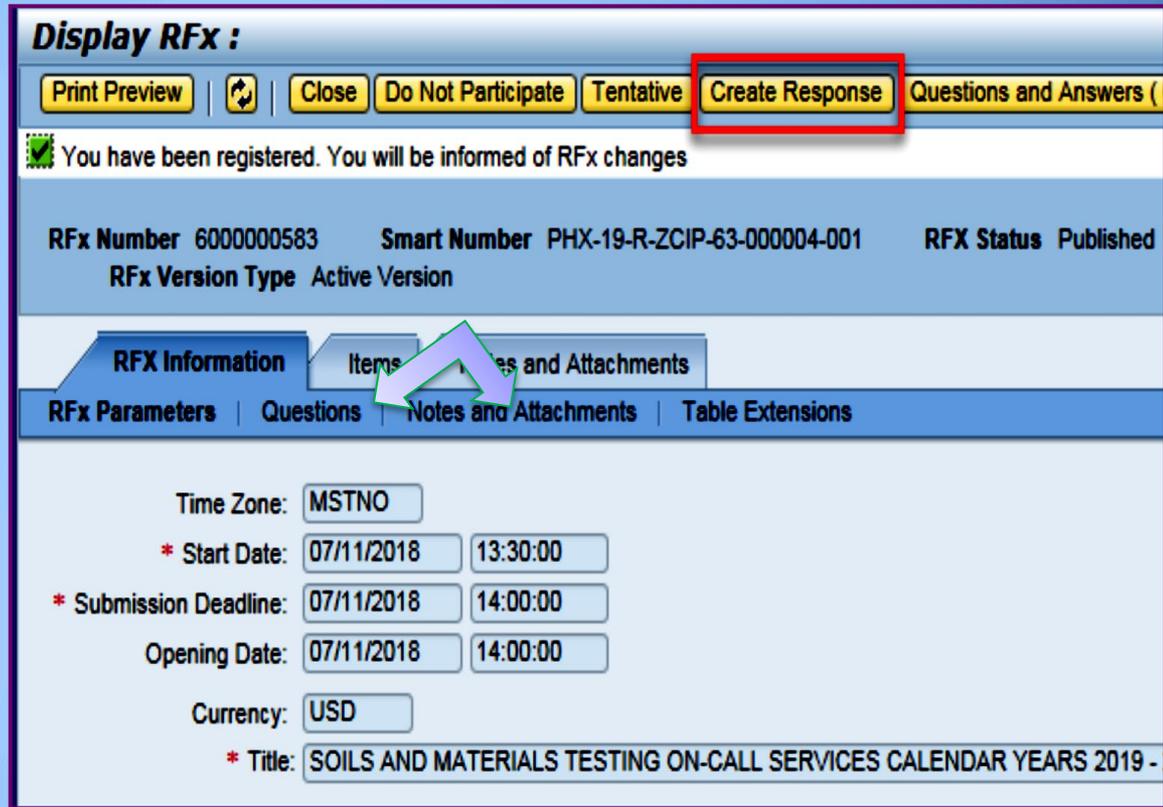
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Opening Date: 07/11/2018 14:00:00

Currency: USD

* Title: SOILS AND MATERIALS TESTING ON-CALL SERVICES CALENDAR YEARS 2019 -



RFX Electronic Submittals

Click **Create Response**

Review **Notes and Attachments** Tab for the RFQ, Pre-Submittal Presentation, Attendance Sheet, and Notifications

Display RFX :

[Print Preview](#) |  | [Close](#) [Do Not Participate](#) [Tentative](#) **[Create Response](#)** [Questions and Answers \(](#)

 You have been registered. You will be informed of RFX changes

RFX Number 6000000583 Smart Number PHX-19-R-ZCIP-63-000004-001 RFX Status Published
RFX Version Type Active Version

RFX Information | [Items](#) | **[Notes and Attachments](#)**

[RFX Parameters](#) | [Questions](#) | **[Notes and Attachments](#)** | [Table Extensions](#)

Time Zone:

* Start Date:

* Submission Deadline:

Opening Date:

Currency:

* Title: SOILS AND MATERIALS TESTING ON-CALL SERVICES CALENDAR YEARS 2019 -



RFx Electronic Submittals

Attach SOQ by clicking **Add Attachment**

Click **Browse** in the pop up window to navigate to the desired attachment document

Add Attachment

Here you can upload an attachment. You have to assign it to either the document general data or to an item

File: **Browse...**

Description:

* Assign To:

OK Cancel

Create RFx Response

Submit | Read Only | Print Preview | Check Close | Save | Export | Import | Questions and A

⚠ Time zone MSTAZ is not valid in country US (several possibilities) - Display Help

RFx Response Number 7000000157 RFx Number 6000000583 Status In Process
RFx Response Version Number Active Version RFx Version Number 2

RFx Information Items **Notes and Attachments** Summary Tracking

▼ Notes

Add ▲ Clear

Assigned To	Category
Document ...	Conditions of Participation
Document ...	RFx/Auction Text

▼ Attachments

Add Attachment Add URL Edit Description Versioning ▲ Delete Create Qualification Profi

Assigned To	Category	Description
The table does not contain any data		



RFx Electronic Submittals

Once you've selected your document, add a Description and then click **OK**

The **Summary** Tab provides a high-level overview of your RFx Response

The image shows two overlapping windows from a software application. The top window is titled 'Add Attachment' and contains the following text and form fields:

Here you can upload an attachment. You have to assign it to either the document general data or to an item

File:

Description:

* Assign To:

At the bottom of this window are 'OK' and 'Cancel' buttons.

The bottom window is titled 'Create RFx Response' and has a menu bar with 'Submit', 'Read Only', 'Print Preview', 'Check', 'Close', 'Save', 'Export', 'Import', 'Questions and Answers (0)', and 'System'. Below the menu bar is a status bar with the following information:

RFx Response Number 7000000157 RFx Number 6000000583 Status In Process Submission De
RFx Response Version Number Active Version RFx Version Number 2

The window has several tabs: 'RFx Information', 'Items', 'Notes and Attachments', 'Summary' (highlighted with a red box), and 'Tracking'.

Under the 'Notes and Attachments' tab, there is a 'Notes' section with 'Add' and 'Clear' buttons. Below it is a table:

Assigned To	Category
Document ...	Conditions of Participation
Document ...	RFx/Auction Text

Below the 'Notes' section is an 'Attachments' section with buttons for 'Add Attachment', 'Add URL', 'Edit Description', 'Versioning', 'Delete', and 'Create Qualification Profile'. Below these buttons is another table:

Assigned To	Category	Description
Document Header	Standard Attachment	My Company's Response to RFQ



RFx Electronic Submittals

Click the **CHECK** button to ensure no system errors
Click the **SUBMIT** button to submit your RFx response

Create RFx Response

Submit | Read Only | Print Preview | Check | Close | Save | Export | Import | Questions and Answers (0) | System Information | Create Memory Snapshot

RFx response is complete and contains no errors

RFx Response Number	7000000157	RFx Number	6000000583	Status	In Process	Submission Deadline	07/11/2018 14:00:00 MSTNO	Opening Da
RFx Response Version Number	Active Version	RFx Version Number	2					

RFx Information | Items | Notes and Attachments | **Summary** | Tracking

RFx Response Number:

Items with Response:

Questions:

Notes:

Attachments:



RFx Electronic Submittals

You will see a confirmation message that your response was submitted

Click **Close**, and return to the RFx (Event) Landing Page

Display RFx Response:

Edit | Print Preview | **Close** | Withdraw | Export | Questions and Answers (0) | System Information | Create Memory Snapshot

RFx response 7000000157 submitted

RFx Response Number	7000000157	RFx Number	6000000583	Status	In Process	Submission Deadline	07/11/2018 14:00:00 MSTNO	Opening Da
RFx Response Version Number	Active Version	RFx Version Number	2					

RFx Information | Items | Notes and Attachments | **Summary** | Tracking

RFx Response Number: 7000000157

Items with Response: 5 out of 5 items responded to

Questions: 5 out of 5 questions answered (5 out of 5 mandatory)

Notes: 2 notes added

Attachments: 1 attachments added



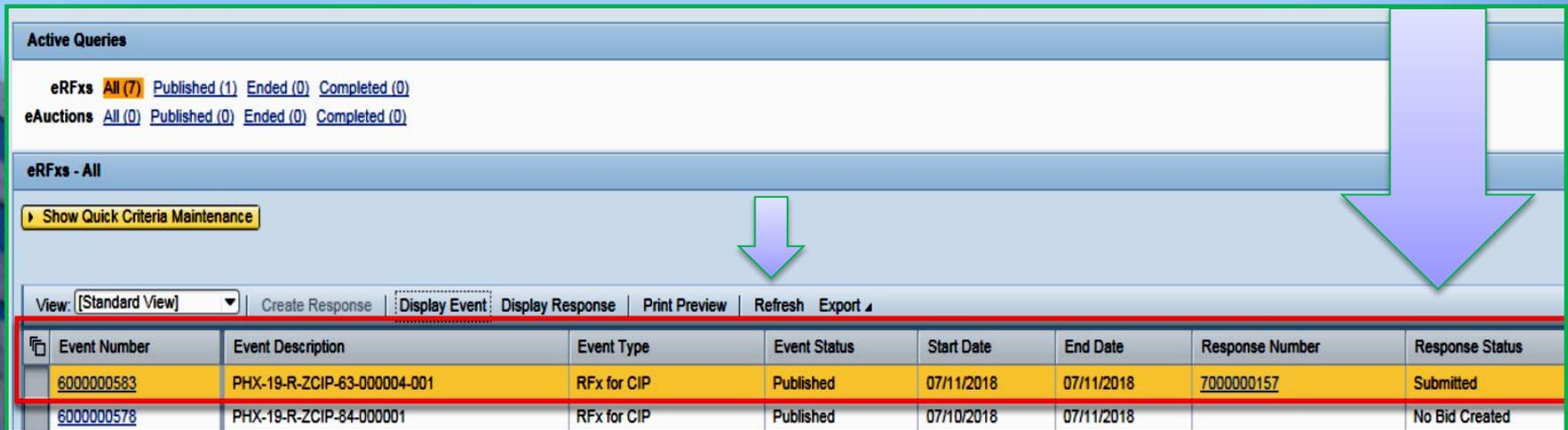
RFx Electronic Submittals

Click Refresh on the RFx (Event) Landing Page.

Locate the desired RFx (Event) Number, and scroll to the right.

Your Response Status should display as **Submitted**.

A Response Status of **In Process**, or **Saved** indicates you are still in edit mode, and need to complete a step(s) before the system will update your RFx response to **Submitted**.



Active Queries

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eAuctions [All \(0\)](#) [Published \(0\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

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6000000578	PHX-19-R-ZCIP-84-000001	RFx for CIP	Published	07/10/2018	07/11/2018		No Bid Created

