

Pre-submittal meeting

CITY OF PHOENIX Water Department PROJECT: GROUNDWATER WELL PROGRAM JOC PROCUREPHX PRODUCT CATEGORY CODE: 912000000 RFx Number: 6000001462 September 26, 2023

Welcome and Introductions

Heather Roye, Contracts Specialist 602-261-8894

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Karina Matthiessen – Equal Opportunity Specialist 602-261-8873

Karina.Matthiessen@phoenix.gov

Joshua Smith, Project Manager Water Services Department

Agenda

What is Job Order Contracting?

Scope of Work/Services

Websites

ProcurePHX / RFx Electronic Submittal

EOD / Labor Compliance

SOQ Evaluation Criteria / RFQ Overview

Submittal Requirements (Page Count, Disqualifications)

Important Dates: Selection Schedule

What is Job Order Contracting

O Alternative Project Delivery Method

• The JOC RFQ is a 1-Step Qualifications-Based Selection Process based on the criteria in the RFS

ONot a Bid

• No guarantee of work

• Projects are on an "As-Needed" basis

• No Federal Funding

Meeting Overview

Sign-in sheet and PowerPoint will be posted on City of Phoenix's ProcurePHX system (RFx: 600001462):

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

(or)

<u>https://solicitations.phoenix.gov/</u>

It is your responsibility as a RFQ holder to determine, prior to submittal, if any Notifications have been issued. Please check both websites to make sure no Notifications have been posted.

This is your ONLY opportunity to discuss this solicitation with City staff.

Project Manager

Project DescriptionScope of Work

Project Description

O City of Phoenix is seeking up to two qualified Job Order Contractors on an as-needed basis

O For a 36-month duration; or \$24,000,000 per JOC, whichever occurs first
 O Option to renew for 24 months and an additional \$16,000,000

Project Description

• There are currently 19 existing groundwater wells in the City of Phoenix ("City") distribution system, with several more that are under evaluation for rehabilitation and restoration to service, 14 wells in active design or construction, and several newer wells planned. These wells are spread throughout the City, and currently are utilized for recharge of surplus water and to produce water for the potable water distribution system as required by demand.

• The Job Order Contractor ("JOC") is to provide supporting services for existing well repair work to assist the City in maintaining the wells in an operational state. This repair work can include, but is not limited to, mechanical equipment such as the well pump, well casing, well motor, piping, valves, on-site treatment facilities, chemical feed systems, electrical equipment, and instrumentation. In addition, the JOC contractor will work as a team with City staff and the City's selected design professionals to procure and install new groundwater treatment systems at the City's new well sites as applicable and will assist with activities related to new well siting, testing, and equipping.

Scope of Work / Services

- Assist City staff with repair and rehabilitation of existing active wells, including but not limited to:
 - Well pump removal, storage, and reinstallation
 - Repair and replacement of the well pump and motor
 - Repairs to existing well casing
 - Well cleaning, air-lift development, logging, sampling, and testing
 - Well video inspection and analysis
- New well siting assistance, including:
 - Exploratory borehole drilling and related activities (surface casing, zonal sampling, etc.)
 - Test well drilling and installation
 - New production well drilling and casing installation, including applicable permitting and regulatory assistance



Scope of Work / Services

- Procurement and installation of on-site groundwater treatment systems, including for arsenic and nitrate
- General repair and replacement of mechanical equipment, including piping, pumps, valves, and chemical treatment systems
- General electrical upgrades and installations of instrumentation and electrical equipment, such as analyzers, meters, sensors, and Supervisory Control and Data Acquisition (SCADA) system components
- General work such as building modifications, painting, updating safety features, specialized maintenance and concrete masonry or structural concrete or steel work
- Emergency repair services
- Advise City on ways to gain efficiencies in project delivery
- Provide detailed cost estimating and knowledge of marketplace conditions
- Provide project planning and scheduling
- Provide long-lead procurement studies and initiate procurement of long-lead items
- assist in the permitting processes
- Participate with the City in a process to set goals for local and SBE participation and implement the local and SBE process



QUESTIONS

FOR THE PROJECT MANAGER

EOD / Labor Compliance

- 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)



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%

1. At time of JOA: <u>Proposed \$ to SBEs</u> Total JOA Value

2. Annual Reviews: <u>Total Countable \$ Paid to SBEs</u> Total Payment on all JOAs During Year

3. At time of Completion: <u>Total Countable \$ Paid to SBEs</u> Total Payment on Contract



SBE Program

SBE Requirements @ Solicitation: None!

SBE Requirements Post-Award: Use SBEs and Report

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

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



SMALL BUSINESS SUB-CONTRACTING GOAL

SBE REQUIREMENT IS 2%

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

GOOD FAITH EFFORTS

In order to be a successful Prime Contractor in the SBE Program, you must show that you took all necessary and reasonable steps to achieve an SBE goal or other requirements of the SBE Program. The steps must be steps which could reasonably be expected to obtain sufficient SBE participation, even if such steps were not fully successful.

Equal Opportunity Department

Equal Opportunity Department

Karina Mattiessen, Equal Opportunity Specialist

Equal Opportunity Department

karina.matthiessen@phoenix.gov

602-261-8873



QUESTIONS





SOQ Evaluation Criteria

The selection of the Consultant will be based on the following qualifications:

- A. General Information (maximum 150 points)
- B. Experience and Qualifications of the Firm (maximum 250 points)
- C. Experience of the Key Personnel to be Assigned (maximum 250 points)
- D. Approach to Performing the Required Services (maximum 350 points)
- E. Reference Check (maximum 21 points*)

Submittal Requirements

- Submit One (1) page Information Sheet
- Paper Size shall be 8½ "x11"; Font size no less than 10 pt.
- Each page containing resumes, evaluation criteria, and additional content will be counted toward the maximum page limit
- Pages that have project photos, charts and/or graphs will be counted toward the maximum page limit

MAXIMUM pages permitted is 10

pages: The following will <u>NOT</u> be counted in the max page count: •Front and back covers •Information Sheet •Table of Contents

Grounds for Disqualification:

- Failure to submit electronically through the ProcurePHX online portal by the due date and time
- Violating "Contact with City Employees" policy

Selection Process

Each SOQ will be evaluated according to the evaluation criteria in the RFQ.

Two firm will be selected

A contract will be executed upon completion of negotiations of contract terms and City Council approval.

Important Dates: Selection Schedule

| Event: | Date: |
|------------------------|---------------------------|
| Pre-submittal meeting | September 26, 2023 |
| SOQs Due | October 6, 2023 |
| Selection Notification | Early November, 2023 |
| | |

Reminders

Place the following items on the <u>Information</u> <u>Sheet</u>:

- Project Title: Groundwater Well Program
- Project Number: RFx Number 6000001462
- *Firm Name
- Firm Address
- Firm Phone Number
- Vendor Number
- Name, Title, and Email Address of Contact Person
- O Do NOT include any other information
- *Please use legal name on the SOQ*

Reminders

- Please be sure to submit your SOQ in a timely manner and DO NOT wait until the last minute before it is due as the system will lock you out at 12 PM and we may not be able to help you fix the issue within that time period.
- Please make sure that you have a least two people in your office that are signed up for e-Procurement so that when one person is out of the office or has left the company, the other person can step in and complete the submittal process.
- Do not use special characters or a long file name when submitting your SOQ.

Questions after today?

Email all questions to: heather.roye@phoenix.gov

Reference **RFx 6000001462** in your email subject line



Thank You for Attending!!!

Procurement Website

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



| City of Phoenix | | Convention | Center = | | |
|---------------------|----------------|------------|---------------------|-------|-----------|
| | Search | | | Q | |
| PHX At Your Service | PHX Pay Online | Map It | Find Public Records | PHXTV | Translate |
| | | | | | |

City of Phoenix > Street Transportation > Procurement Opportunities

Consulting & Construction For Capital Improvement Programs

Design and Construction Procurement coordinates the contracting process for capital improvement projects using Design-Build, Job Order Contracting, Design-Build, and Construction Manager at Risk project delivery methods. The section handles all aspects relating to the contracting process from advertisement through contract award and execution under A.R.S. Title 34 and the direction of the City Engineer.

*EFFECTIVE MONDAY, MARCH 11, 2019 ALL DESIGN AND CONSTRUCTION PROCUREMENT WEB PAGE LINKS NOW DIRECT TO THE MAIN CITY OF PHOEN SOLICITATIONS PAGE.

Current Opportunities - Request for Qualifications, project plans, and specifications for projects that are currently available, as well as project amendments,

notifications, plan holders list, pre-bid or pre-submittal sign-in sheets and PowerPoint presentations.

Project Interviews – Firms recently short-listed to participate in interviews for professional services and construction opportunities, as well as firms short-listed for 2-Step procurement processes.

Bid Results and Project Selections - Preliminary and final bid results are for Design-Bid-Build procurement opportunities. Preliminary bid results do not reflect the responsiveness or responsibleness of any received bids. Project Selections identify firms to be awarded professional services and construction opportunitie with the City.

Subscribe to Procurement Newsletter – Register to be on the distribution list for the free weekly newsletter that advertises design and construction opportunities.

In an effort to decrease paper costs, Design and Construction Procurement will place all construction plans, specifications, and addendum/notificatior on the City of Phoenix website for downloading. Interested parties can download the information and print at their own offices or copy the informatio to a disk and take to any reprographics company of their choice.

Other Useful Resources

🚽 Protest Policy

Submit Protest to City Clerk

Submitter's Handbook

Public Records Request

SBE/DBE Directory

City of Phoenix Solicitations Website

Project-specific RFQs, Notifications, Sign-in Sheets, PowerPoint Presentations

2. Link to "**Tabulations**, Awards and **Recommendations**" web page

https://solicitations.phoenix.gov



Tabulations, Awards, and Recommendations

Solicitations

The City of Phoenix is committed to the principles of open competition and fairness for the procurement of goods and services. Working with customers, the City strives to ensure that our community receives the best value for the tax dollars that are expended.

The following is a list of all formal solicitations estimated to cost \$100,000 or more available for open competition. The list is inclusive of all formal solicitations issued by all City Departments for goods and services and for A.R.S Title 34 professional and construction services through the Office of the City Engineer. Please read the solicitation for submission instructions and requirements.

For information about the results of recent solicitations, visit the Tabulations, Awards, and Recommendations web page.

Search and Filter Options:

| Search for Solicitation by: | Limit to NIGP | |
|--|---------------|-------|
| ● Number ○ Title ○ Department ○ NIGP Code | | |
| Solicitation number "contains" searched term | All | ~ |
| Search Clear | | Clear |

RFx Hints & Tricks

Brief overview for online submissions



RFx Overview

| Vendor Registration | Login | Viewing Solicitations | Subscribe to Notifications | |
|---------------------------------|-------------------|--------------------------------|-------------------------------|--|
| Uploading & Attaching SOQ | Submitting SOQ | Checking Response Status | Editing Response | |
| FAQ | Tips & Tricks | Things to Remember | Questions | |

Registration





All Firms **MUST** be registered in the Vendor Management System **PRIOR TO** submitting a Proposal

<u>**New Firms**</u> – After registering, the City will send an e-mail with a vendor **number** in approximately two days

Information on how to register with the City is available at:

https://www.phoenix.gov/finance/vendorsr eg

Login to ProcurePHX

| procure PHX | |
|--------------------|--|
| | User * Password * Log On Logon Problems? <u>Get Support</u> |
| | |

If your firm is already registered with the City of Phoenix's ProcurePHX system, visit <u>https://eprocurement.phoenix.gov/irj/portal</u> to login and access the electronic solicitation

Product Category Code is: **912000000** RFx (Event) Number is: **6000001462**

Note: The **VENDOR NUMBER** is to be included on the cover of the Statement Of Qualifications

RFx Home Screen

Once you are logged in to the ProcurePHX portal:

Select **RFx and Auctions** tab on the top Ribbon

You will be taken to the **RFx Overview** (Event) Page



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

Finding Solicitations

| | D | D | | | | | | | |
|--------------------|--|--------------------------------------|-----------------------------|------------|--|--|--|--|--|
| RFx and Auctions | Administration | Messages | | | | | | | |
| Overview | | | | | | | | | |
| RFx and Auctions | > Overview > R | Fx and Auctions | | | | | | | |
| | | | | | | | | | |
| Active Que | ries | | | | | | | | |
| eRFxs eAuctions | eRFxs All (7) Published (1) Ended (0) Completed (0) eAuctions All (0) Published (0) Ended (0) Completed (0) | | | | | | | | |
| eRFxs - All | I | | | | | | | | |
| View: [Sta | <mark>ick Criteria Maintena</mark> andard View] | Create Response Display Event Disp | play Response Print Preview | Refresh Ex | | | | | |
| Th Event | Number | Event Description | Event Type | Event Sta | | | | | |
| 60000 | 00583 | PHX-19-R-ZCIP-63-000004-001 | RFx for CIP | Published | | | | | |

- Click the Refresh Button on the RFx Overview (Event) Page to see the most current information.
- Find the solicitation you'd like to view from the list, by RFx (Event) Number.
- For this solicitation, your RFx (Event) Number is: 6000001462

View Selected Solicitation

- Click the gray box next to the RFx (Event) Number you'd like to view.
- 2. 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**.*



Would you like updates on this solicitation?



Update your **Participation Status** accordingly

- Click Participate. This will ensure you to get email notifications regarding your RFx Event, i.e. Notifications, New Attachments.
- 2. Review **RFx Information** Tab for Start/Due dates/ Title of Solicitation

Do you want to submit for this solicitation?

- 1. Click **Create Response**
- 2. Review Notes and Attachments Tab for the RFQ, Pre-Submittal Presentation, Attendance Sheet, and Notifications, etc.

| Display RFx : | | | | | | | |
|---|-----------------------------------|-----------|---------------|-------------------------|--|--|--|
| Print Preview | Close Do Not Participate Ten | tative Cr | eate Response | Questions and Answers (| | | |
| 📕 You have been registere | d. You will be informed of RFx ch | anges | | | | | |
| RFx Number 6000000583 Smart Number PHX-19-R-ZC 2 J00004-001 RFX Status Published RFx Version Type Active Version | | | | | | | |
| RFX Information | Items Notes and Attach | ments | | | | | |
| RFx Parameters Que | stions Notes and Attachment | s 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 | | | | | | |
| e periori y e ere. | | | | | | | |
| Currency: | USD | | | | | | |

How to upload your SOQ

Create RFx Response

| Submit Read On | ly Print Preview C | check Close | Save Export | Import Questions and A | | | |
|--|---|-----------------------------------|---------------------------|---------------------------------|--|--|--|
| 🚹 Time zone MSTAZ | is not valid in country L | JS (several pos | sibilities) - Displ | ay Help | | | |
| RFx Response Nun RFx Respons | nber 7000000157 Se Version Number Ad | RFx Number tive Version | 6000000583 RFx Version | Status In Process n Number 2 | | | |
| RFx Information Items Notes and Attachments Summary Tracking | | | | | | | |
| ▼ Notes | | | | | | | |
| Add Clear | | | | | | | |
| Assigned To | Category | | | | | | |
| Document | Conditions of Participa | ation | | | | | |
| Document | REx/Auction Text | | | | | | |
| | 1 | | | | | | |
| ▼ Attachments | | | | | | | |
| Add Attachment | Add URL Edit Desci | ription Versio | ning 🖌 Delete | Create Qualification Profil | | | |
| Assigned I o | - | Category | | Description | | | |
| i The table of | does not contain any da | ta | | | | | |

- Attach SOQ by clicking **Add Attachment**, there will be a separate pop up window
- Click **Browse** in the pop up window to navigate to the desired attachment document

| Add Attachment | | × |
|--|--------------|---|
| Here you can upload an attact File: Description: * Assign To: | General Data | |
| | OK Cancel | |

Adding an Attachment

- Once you've selected your document, add a Description and then click OK
- 2. The **Summary** Tab provides a high-level overview of your RFx Response
- 3. Under description click the **blue link** to double check the file that has been uploaded



Double Check & Submit

1. Click the **CHECK** button to ensure no system errors

2. Click the **SUBMIT** button to submit your RFx response

| Create | RFx Res | ponse | \mathbb{Z}^{1} | ~ | | | | | | | | | |
|-----------------|---|-------------------|------------------|---------|------|--------|--------|----------|---------------------|---------------------|----------------|--------------|---|
| Submit | Read Only | Print Preview | Check | Close | Save | Export | Import | Question | s and Answers (0) | System Informati | on Create Memo | ory Snapshot | : |
| RFx resp | onse is com | plete and contain | s no error | s | | | | | | | | | |
| RFx Resp RFx | 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 I | Notes and | Attachm | ents | Sui | mmary | Track | ng | | | | |
| | | | | | | | | | | 700000457 | | | |
| | | | | | | | | | (Ex Response Numb | er: 700000157 | | | |
| | | | | | | | | | Items with Response | e: 2 out of 2 items | responded to | | |
| | Questions: 0 out of 0 questions answered (0 out of 0 mandatory) | | | | | | | | | | | | |
| | | | | | | | | | Notes | : 1 notes added | | | |
| | | | | | | | | | Attachments | a: 1 attachments a | dded | | |

RFx Response Submitted

- You will see a RFx response message that your response was submitted. No email notification will be sent.
- 2. Confirm you have the **required number of attachments** listed, as outlined in the RFQ.
- 3. Click **Close** and return to the RFx Overview (Event) Page.

| Display RFx Response: | | |
|--|--|---------|
| Pedit Print Preview 🗘 Close Withdraw Export Questions | is and Answers (0) System Information Create Memory Snapshot | |
| RFx response 7000000157 submitted | | |
| RFx Response Number 7000000157 RFx Number 6000000583 RFx Response Version Number Active Version RFx Version | Status In Process Submission Deadline 07/11/2018 14:00:00 MSTNO Oper n Number 2 | ning Da |
| RFx Information Items Notes and Attachments Sum | mmary Tracking | |
| | KFx Response Number: 7000000157 | |
| | Items with Response: 2 out of 2 items responded to | |
| | Questions: 0 out of 0 questions answered (0 out of 0 mandatory) | |
| | Notes: 1 notes added | |
| | Attachments: 1 attachments added | |

Checking the Response Status

1. Click **Refresh** on the RFx Overview (Event) Page.

- 2. Locate the desired RFx (Event) Number, and scroll to the right.
- 3. Your Response Status should display '**Submitted**'.

Note: A Response Status of **In Process**, or **Saved** indicates you are still in edit mode, and need to complete steps before the system will update your RFx response to **Submitted**.

| Active Queries | Active Queries | | | | | | | | | |
|---|---|------------------------|------------------|------------|------------|-----------------|-----------------|--|--|--|
| eRFxs All (7) Published (1) Ended (0) Completed (0) eAuctions All (0) Published (0) Ended (0) Completed (0) | | | | | | | | | | |
| eRFxs - All | eRFxs - All | | | | | | | | | |
| Show Quick Criteria Mainten | Show Quick Criteria Maintenance | | | | | | | | | |
| View: [Standard View] | Create Response Display Event Display R | Response Print Preview | Refresh Export 4 | | | | | | | |
| Event Number | Event Description | Event Type | Event Status | Start Date | End Date | Response Number | Response Status | | | |
| <u>6000000583</u> | PHX-19-R-ZCIP-63-000004-001 | RFx for CIP | Published | 07/11/2018 | 07/11/2018 | 700000157 | Submitted | | | |
| <u>6000000578</u> | PHX-19-R-ZCIP-84-000001 | RFx for CIP | Published | 07/10/2018 | 07/11/2018 | | No Bid Created | | | |

How to Edit Your Submission

The RFx Overview (Event) 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 (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 | | | | | | |
| Event Number | Event Description | Event Type | Event Status | Start Date | End Date | Response Number |
| 600000583 | PHX-19-R-ZCIP-63-000004-001 | RFx for CIP | Published | 07/11/2018 | 07/11/2018 | 700000157 |
| 600000578 | PHX-19-R-ZCIP-84-000001 | RFx for CIP | Published | 07/10/2018 | 07/11/2018 | |
| 600000552 | DUV 49 D 701D 62 000006 | DEv for CID | Dublished | 06/00/0040 | 07/00/0049 | |

Frequently Asked Questions



Tips & Tricks

 Click "Refresh" often
 Make sure your Pop-Up blocker is turned off

• Application is accessible with Internet Explorer or Google Chrome

• When finished, always click "Close" on current screen, then click "Log Out" on upper right corner, following you can click the "X" in the upper right corner of the internet application.