Pre-Submittal Meeting

**CITY OF PHOENIX
REQUEST FOR QUALIFICATIONS**

**LARGE VALVE REPAIR AND REPLACEMENT
JOB ORDER CONTRACT
4108JOC218**

**PROCUREPHX PRODUCT CATEGORY CODE 912000000
RFx 6000001497**

November 6, 2023

Welcome and Introductions

Liz Blakley, Contracts Specialist
Office of the City Engineer
elizabeth.blakley@phoenix.gov   (602) 495-3654

Karina Matthiessen, Equal Opportunity Specialist

Equal Opportunity Department

Karina.Matthiessen@phoenix.gov   (602) 261-8873

Project PM: Larry Valenzuela
Water Services Department

Agenda

❑ **Vendor Registration**

❑ **Project Description & 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: 6000001497):**
   https://eprocurement.phoenix.gov/irj/portal

❑ **And on Procurement's website:**

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

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**

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

  - https://www.phoenix.gov/finance/vendorsreg

What is Job Order Contracting

- Alternative Project Delivery Method
- The JOC RFQ is a 1-Step Qualifications-Based Selection Process based on the criteria in the RFQ
- Not a Bid
- No guarantee of work
- Projects are on an "As-Needed" basis
- No Federal Funding

EQUAL OPPORTUNITY DEPARTMENT

❖ 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: 3%

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

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

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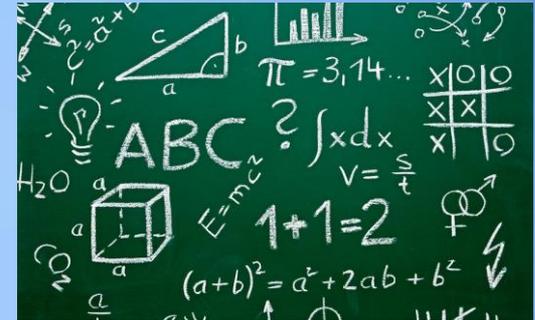
SBE Program

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 3%

- This Solicitation Is Open To All Firms

- No SBE Documents Due At This 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
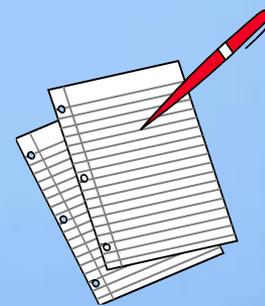
QUESTIONS

FOR EOD

Project Description

- ❑ Repair and replacement of large diameter waterline valves
- ❑ Gate & butterfly valves 16-inch to 108-inch diameter
- ❑ Installation of new valves
- ❑ Abandonment of existing valves
- ❑ Installation of motor operators
- ❑ Installation/repair of manholes and vaults
- ❑ Procurement of materials
- ❑ Certified welding
- ❑ Work in confined space

Scope of Work

Installation of 48-inch Butterfly Valve & Fitting

Scope of Work

Installation of 60-inch Butterfly Valve & Fitting

Scope of Work

Repairs

❑ Repair packing glands

❑ Repair broken actuators

❑ Troubleshooting valve operability

❑ Verifying open/closed positions

❑ Rehabilitating frozen valves

QUESTIONS?

SOQ Criteria

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

A. General Information (150 points)

B. Experience of Prime Firm (250 points)

C. Experience of Key Personnel (250 points)

D. Project Understanding and Approach (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: 6000001497

➢ 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.**

❑ <u>MAXIMUM pages permitted is:</u> **15 pages**

Statement of Qualifications Submittal (cont.)

❑ Each page 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, November 17, 2023

Selection Process

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

- Up to two JOC contractors will be selected.

- 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.**

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

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 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.

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 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 Statu
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   es and Attachments

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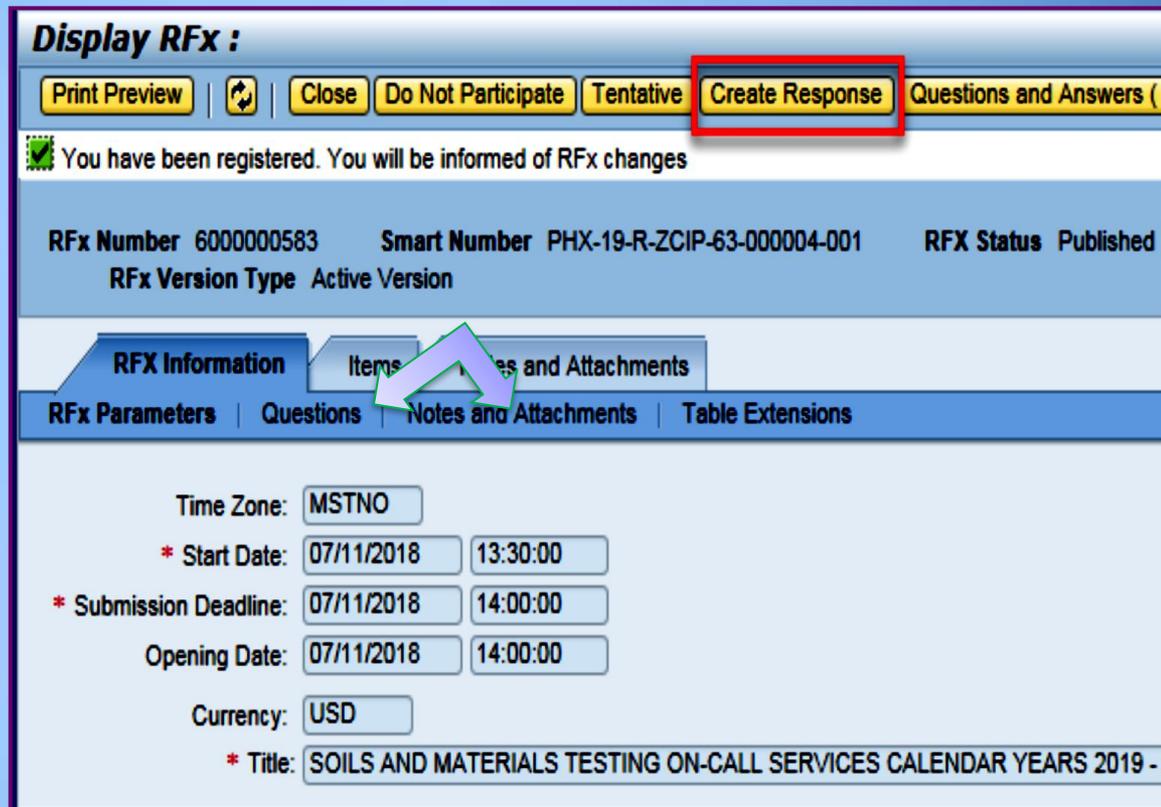
RFx Electronic Submittals

Click **Create Response**

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

RFx Electronic Submittals

Attach SOQ by clicking **Add Attachment**

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

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		

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: General Data ▾

OK Cancel

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

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:	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

You will see a confirmation message that your response was submitted

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

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**.
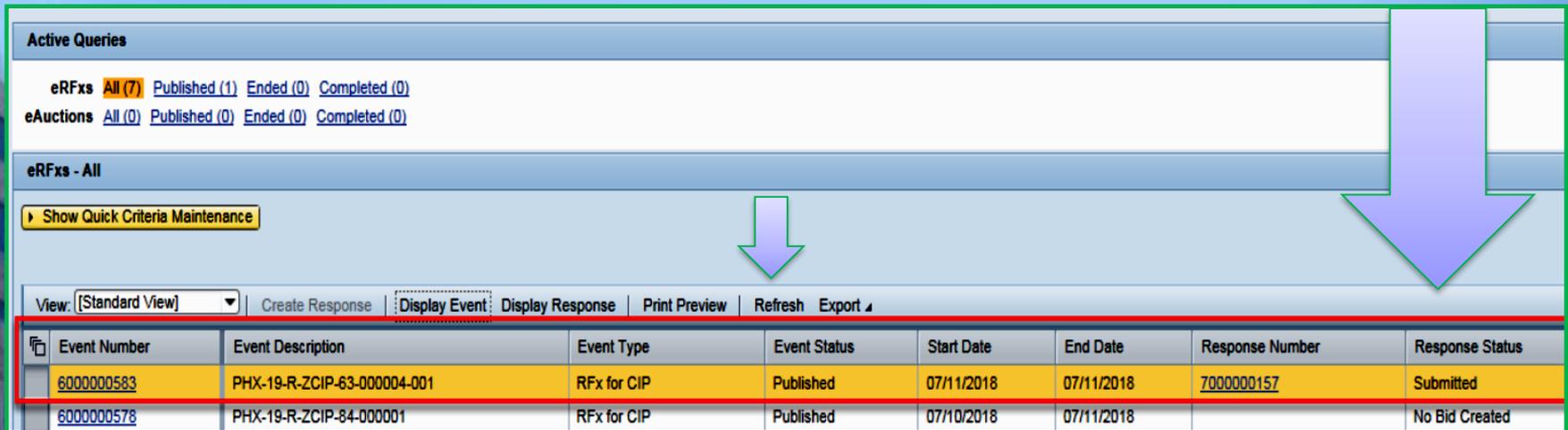
	Active Queries							

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	Response Status
	6000000583	PHX-19-R-ZCIP-63-000004-001	RFx for CIP	Published	07/11/2018	07/11/2018	7000000157	Submitted
	6000000578	PHX-19-R-ZCIP-84-000001	RFx for CIP	Published	07/10/2018	07/11/2018		No Bid Created

Selection Schedule

❑ SOQs Due   November 17, 2023

❑ Scope Meeting   December 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:

elizabeth.blakley@phoenix.gov

Elizabeth Blakley, Contracts Specialist
(602) 495-3654

Thank you for your interest in this project!!!