Pre-submittal Meeting

CITY OF PHOENIX Water Services Department



Instrumentation And Control Systems Inspection And Testing Services For Water Remote Facilities Engineering Services

PROJECT WS85400011 PROCUREPHX PRODUCT CATEGORY CODE: 92500000 RFx Number: 6000001496

November 28, 2023

Welcome and Introductions

Tonja Lepur, Contracts Specialist I *Point of Contact for Submittals and RFQ Questions* Office of the City Engineer **tonja.lepur@phoenix.gov**

(602) 256-4107

Stephen Daras, Civil Engineer II Water Engineering Design & Construction Management Water Services Department

Andrew Baumgardner, Civil Engineer III, PE, Team Lead Water Engineering Design & Construction Management Water Services Department Agenda

Meeting Overview

Scope of Work/Services

SOQ Evaluation Criteria / RFQ Overview

Submittal Requirements (Page Count, Disqualifications)

Important Dates: Selection Schedule

Websites

ProcurePHX / RFx Electronic Submittal

Meeting Overview

To be added to the Attendance Sheet, send an email by 5:00 PM today to <u>tonja.lepur@phoenix.gov</u> with the following:

RFX 6000001496 Attendance, your Name, Firm Name, Phone Number, and E-mail address

Sign-in sheet and PowerPoint will be posted on City of Phoenix's ProcurePHX system (RFx: 6000001496):

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

(or)

https://solicitations.phoenix.gov/

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

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

Project Description/Background

- The City has developed electrical, instrumentation and control standards for the entire Water Services Department which are used to provide consistency in the control systems.
- > The selected consultant will be enforcing these standards on all projects.
- The areas of work are in the design phase, construction installation inspections, and commissioning testing and calibrations of the instrumentation and control systems.

Scope of Work / Services

The selected firm will provide:

- Design support services consisting of presenting advice and technical consultations relative to installation techniques and procedures.
- Provide construction and commissioning support services.
- Support the engineer with research of existing conditions.



Scope of Work / Services cont.

Services will include, but not be limited to:

- Attend design meetings
- Support the engineering consultant with the understanding of the Water Services Departments standards for EIC systems
- Perform loop tests, function testing and instrumentation calibrations
- Field observations
- ➢ Review accuracy of design and as-built P&IDs
- City staff support and troubleshooting





QUESTIONS

FOR THE PROJECT MANAGER

SOQ Evaluation Criteria



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

Design Support Services Experience of the Prime Firm (max. 150 pts.) Α. Construction and Commissioning Support Services Experience of the Prime Firm (max. 150 pts.) Β. Design Support Services Experience of the Key Personnel and Subconsultants (max. 125 pts.) С. Construction and Commissioning Support Services Exp. of Key Personnel and Subconsultants (max. 125 pts.) D. **Project Understanding and Approach** (max. 300 pts.) Ε. (max. 150 pts.) Staffing Information for Key Personnel F. (max. 21 pts.*) Reference Check G.

*These points are in addition to the 1,000 points for the SOQ.

Maximum number of points is 1,000 Provide responses in the order listed in the RFQ Be complete, be concise

SUBMITTAL REQUIREMENTS

MAXIMUM pages permitted is

<u>10 pages</u> 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 <u>electronically</u> through the ProcurePHX online portal by the due date and time
- Submit under the wrong RFx number
- Violating "Contact with City Employees" policy

Submit One (1) page <u>Information Sheet</u>: project title/number; RFx number; firm name, address, phone number, vendor number; project contact person name, title, email address and signature. Do not include any additional information.

Paper Size 8½" x 11"; Font size no less than 10 pt. May submit portrait or landscape.

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 noted above.

SELECTION PROCESS

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



Up to 1 consultant will be selected.



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

		Event:	Date:
		Pre-submittal meeting	November 28, 2023
Impo Dat	ertant tes:	SOQs Due	December 8, 2023
Selec Sche	ction dule	Selection Notification	Late December 2023
		Scope of Work Meeting	Mid January 2024

Procurement Website

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





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-Bid-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 advertisemer 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

- 1. Project-specific RFQs, Notifications, Sign-in Sheets, PowerPoint Presentations
- 2. Link to "Tabulations, Awards and Recommendations" web page
- https://solicitations.phoenix.gov



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:



Brief overview for online submissions

RFx Hints & Tricks

RFx Overview



Registration

REGISTRATION HELP



Call Help Desk (602) 262-1819

Email Help Desk vendor.support@phoenix.gov







To do business with the city you must register in **procurePHX**. To register, you must have a signed, scanned copy of your W-9. **Need Help?** Email **vendor.support@phoenix.gov** or call (602) 262-1819.

Instructions	>
Registration	>
ProcurePHX Login	>

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/vendorsreg

Login to ProcurePHX

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: **92500000** RFx (Event) Number is: **6000001496**

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

- 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: 600001496

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Οv	ervie	ew	-								
	RFx and Auctions > Overview > RFx and Auctions										
		Active Queries									
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	eRFxs - All										
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		6000000583 PHX-19-R-ZCIP-63-000004-001 RFx for CIP Publish						shed			

View Selected Solicitation

- 1. 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**.*

RFx and Auct	ions Administration	Messages				
Overview						
RFx and Au	ictions > Overview > F	RFx and Auctions				
Activ	ve Queries					
e	RFxs All (7) Published	(1) Ended (0) Completed (0)				
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eRF	cs - All					
► Sh	ow Quick Criteria Mainter	nance 2				
Vie	w: [Standard View]	Create Response Display Event Display Re				
	Event Number	Event Description				
	<u>5000000583</u>	PHX-19-R-ZCIP-63-000004-001				
	600000578	8 PHX-19-R-ZCIP-84-000001				

Would you like updates on this solicitation?



Update your **Participation Status** accordingly

- 1. 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 :				1	_	
Print Preview	Close Do Not Pa	rticipate Ten	tative Creat	e Response	Questions and	Answers (
📕 You have been registere	d. You will be infor	med of RFx cha	anges			
RFx Number 600000058 RFx Version Type	33 Smart Nur Active Version	nber PHX-19-	R-7 5-00	00004-001	RFX Status	Published
RFX Information RFx Parameters Que	Items No estions Notes a	tes and Attach	ments	ktensions		
Time Zone: * Start Date: * Submission Deadline: Opening Date:	MSTNO 07/11/2018 1 07/11/2018 1 07/11/2018 1	3:30:00 4:00:00 4:00:00				
Currency: * Title:	SOILS AND MATE	ERIALS TESTI	NG ON-CALL	SERVICES C	ALENDAR YEA	ARS 2019 -)

How to upload your SOQ:

Create RFx R	esponse			
Submit Read Or	nly Print Preview	Check Close	Save Export	Import Questions and
🦺 Time zone MSTAZ	is not valid in countr	y US (several po	ssibilities) - Disp	lay Help
RFx Response Nur RFx Respons	nber 7000000157 se Version Number	RFx Numbe Active Version	r 6000000583 RFx Versio	Status In Process on Number 2
RFx Informati	on Items	Notes and Atta	chments	Summary Tracking
✓ Notes Add ⊿ Clear				
Assigned To	Category			
Document	Conditions of Partic	ipation		
Document	RF Juction Text			
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Add Attachment	Add URL Edit De	scription Versio	oning 🖌 Delete	Create Qualification Prof
Assigned to	-	Category		Description
i The table	i The table does not contain any data			

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



Adding an Attachment

- 1. 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

Add Attachment								
ur k	Here you can upload an attachment. You have to a File: H:\SAP\RFx\My Com Description: pany's Response to F * Assign To: General Data	ssign it to either the document general da npan Browse RFQ	ta or to an item					
Create RFx Response								
Submit Read Only Print Previe	Submit Read Only Print Preview Check Close Save Export Import Questions and Answers (0) Syste							
RFx Response Number 7000000157 RFx Number 6000000583 Status In Process Submission De 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 Te	ext							
▼ Attachments								
Add Attachment Add URL Ed	tit Description Versioning Delete Create C	Qualification Profile						
Assigned To	Category	Description	3					
Document Header	Standard Attachment	My Company's Response to RFQ						

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 Response
2	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 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:
🖉 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
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

	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 4							
I	Event Number	Event Description	Event Type	Event Status	Start Date	End Date	Response Number	Response Status
	600000583	PHX-19-R-ZCIP-63-000004-001	RFx for CIP	Published	07/11/2018	07/11/2018	700000157	Submitted
1	600000578	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.

1. 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) Ended (0) Completed (0) eAuctions All (0) Published (0) Ended (0) Completed (0)						
eRFxs - All						
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Event Number	Event Description	Event Type	Event Status	Start Date	End Date	Response Number
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600000583	PHX-19-R-ZCIP-63-000004-001	RFx for CIP	Published	07/11/2018	07/11/2018	7000000157
600000583 600000578	PHX-19-R-ZCIP-63-000004-001 PHX-19-R-ZCIP-84-000001	RFx for CIP RFx for CIP	Published Published	07/11/2018	07/11/2018 07/11/2018	7000000157

Frequently Asked Questions

When I submit, what does the <u>red</u> circle mean?
--

 Error on page and <u>nothing</u> will be submitted When I submit, what does the <u>yellow</u> triangle mean?

• Typically, a time zone error, information will still be submitted When I submit, what does the <u>green</u> square mean?

 Verify information is correct and click submit

Create RFx Response Submit Read Only Print Preview Check Close Save Export Import Questions Line 0002: Attribute Did you provide a response? is mandatory; maintain attribute value Line 0003: Attribute Did you provide a response? is mandatory; maintain attribute value Line 0004: Attribute Did you provide a response? is mandatory; maintain attribute value Line 0005: Attribute Did you provide a response? is mandatory; maintain attribute value Time zone MSTAZ is not valid in country US (several possibilities) - Display Help RFx Response Number 7000000157 RFx Number 6000000583 Status In Proce RFx Response Version Number Active Version RFx Version Number 2

Tips & Tricks



How to scroll (Screenshot w/arrows)

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.

Reminders

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

➢Project Title

➢ Project Number (RFx Number 6000001496)

≻Firm Name

≻Firm Address

≻Firm Phone Number

≻Vendor Number

>List the various services your firm is available to provide

► Name, Title, and Email Address of Contact Person

Do NOT include any other information

Reminder:

SOQ Due:

Electronically by 12:00 NOON – Phoenix time Friday, December 8, 2023

ProcurePHX online portal

Please do not wait until the last minute to submit your SOQ. The system can be slow and will lock you out at 12:00 PM.

Questions after today?

Email all questions to: <u>tonja.lepur@phoenix.gov</u> Or call: 602-256-4107

Reference RFx 6000001496 in your email subject line.

