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: 925000000
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 tonja.lepur@phoenix.gov 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:

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

*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
10 pages
The following will NOT 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
- Submit under the wrong RFx number
- Violating "Contact with City Employees" policy

Submit One (1) page Information Sheet: 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.

Important Dates: Selection Schedule

Event:	Date:
Pre-submittal meeting	**November 28, 2023**
SOQs Due	**December 8, 2023**
Selection Notification	**Late December 2023**
Scope of Work Meeting	**Mid January 2024**

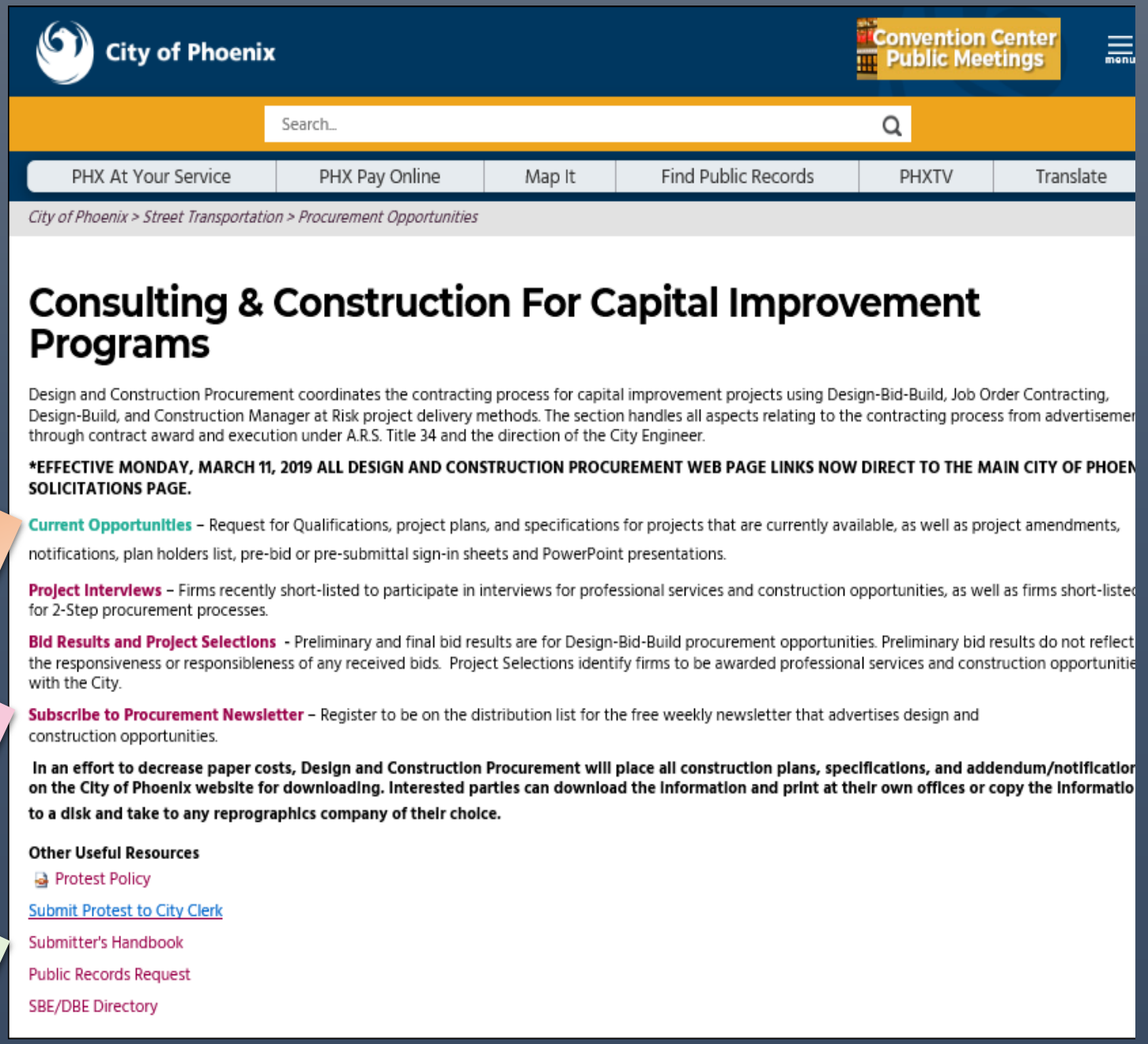
Procurement Website

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

Solicitations Website

Procurement Newsletter

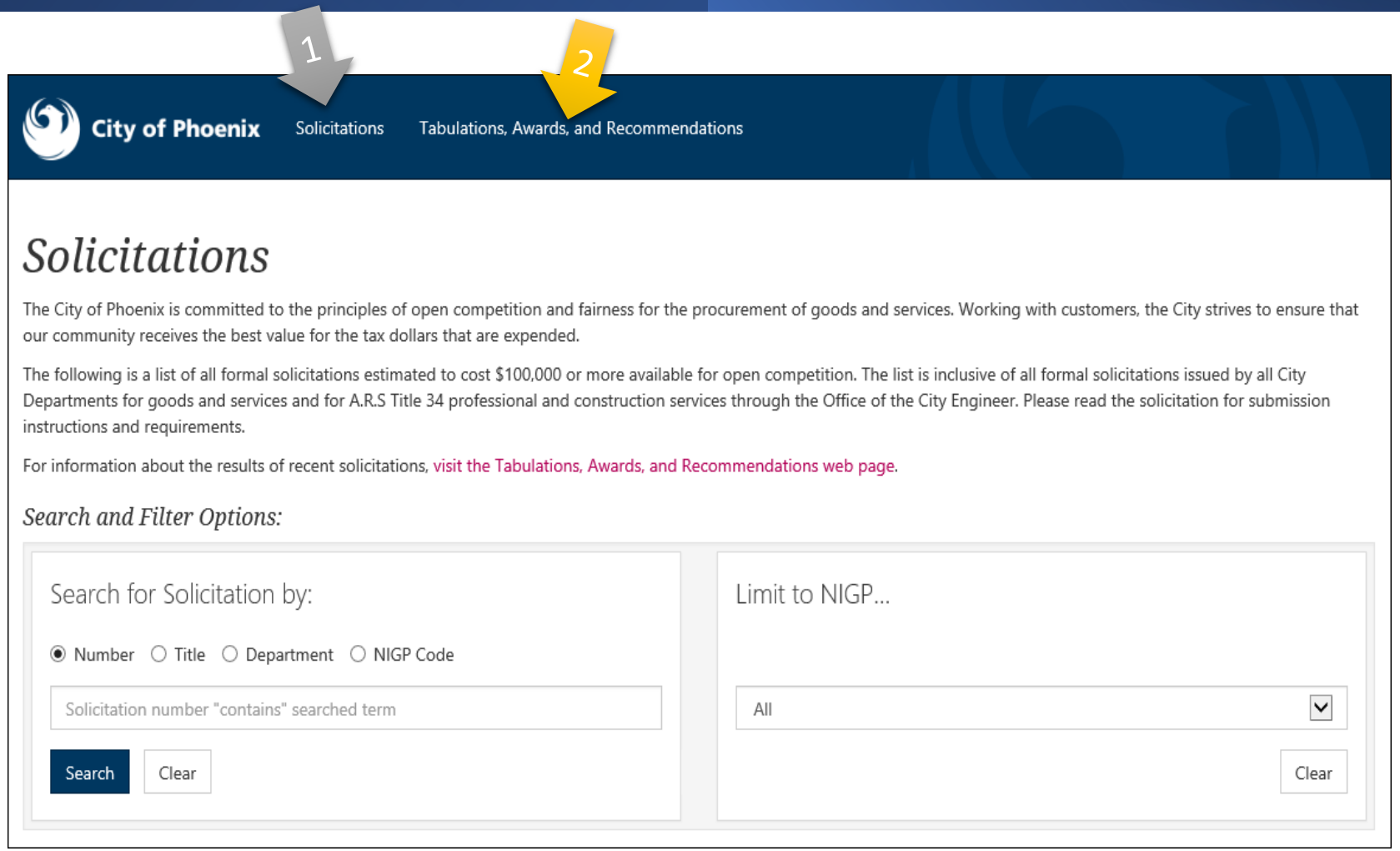
Submitter's Handbook



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



procurePHX

Have you signed up?

- Brief overview for online submissions

RFx Hints & Tricks

RFx Overview

- Vendor Registration/Login
- Frequently Asked Questions
- Tips and Tricks
- Viewing Solicitations
- Subscribe to Notifications
- Uploading & Attaching SOQ
- Submitting SOQ
- Checking Response Status
- Editing Response
- Things to Remember
- Questions

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** 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 **https://eprocurement.phoenix.gov/irj/portal** to login and access the electronic solicitation

Product Category Code is: **925000000**
RFx (Event) Number is: **6000001496**

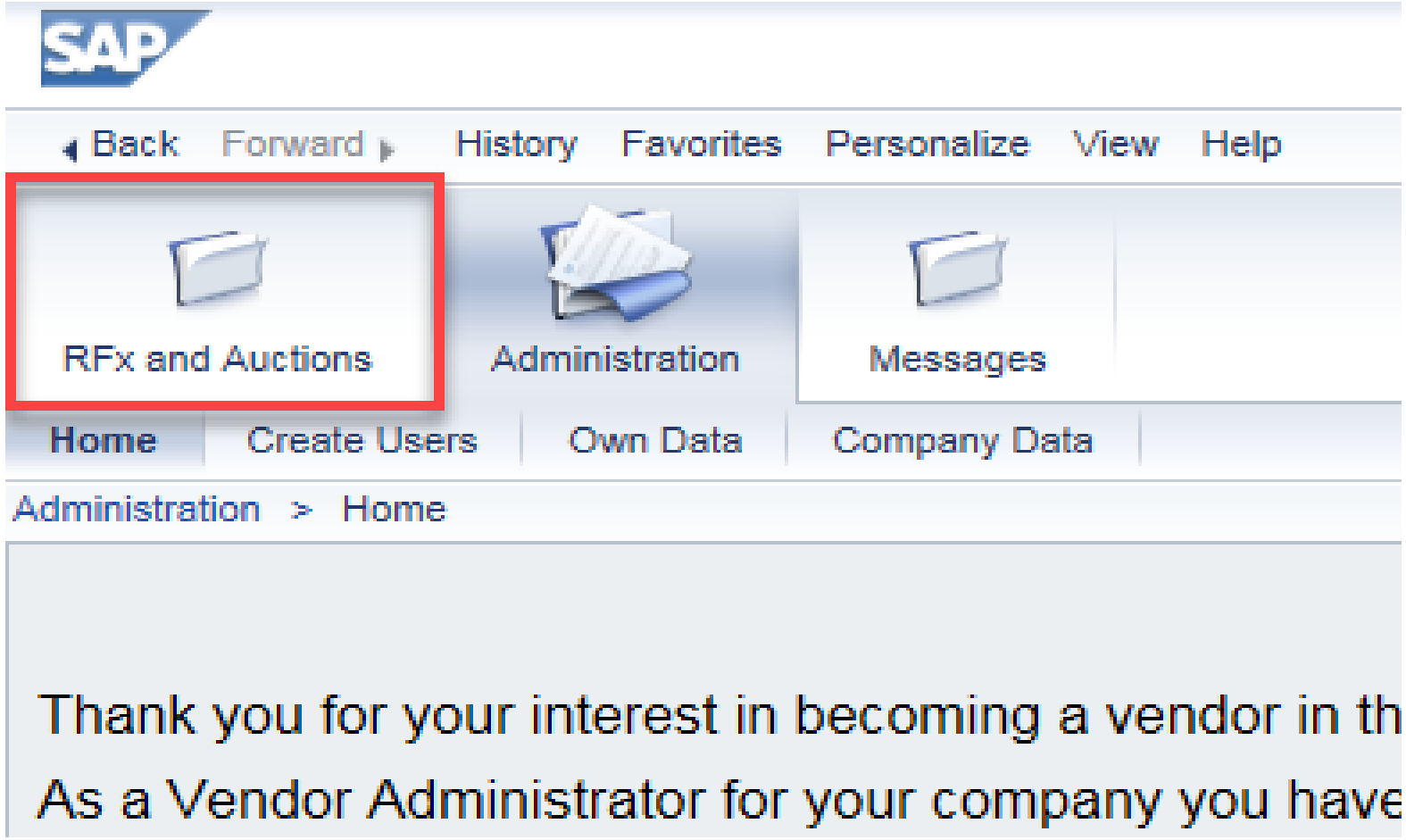
Note: The **VENDOR NUMBER** is to be included on the cover of the Statement Of Qualifications

RFx Home Screen

Once you are logged in to the ProcurePHX portal:

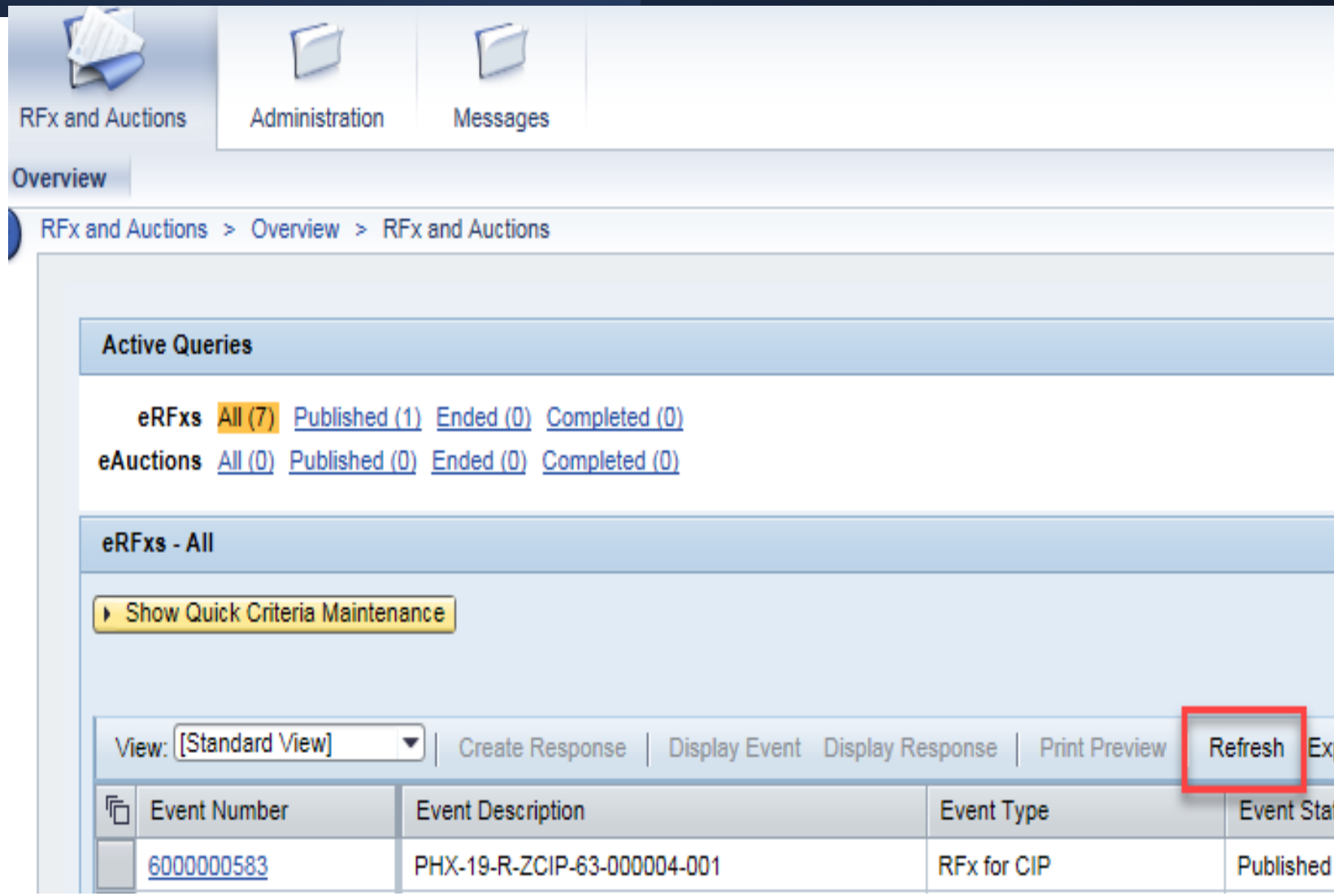
Select **RFx and Auctions** tab on the top Ribbon

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



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: 6000001496



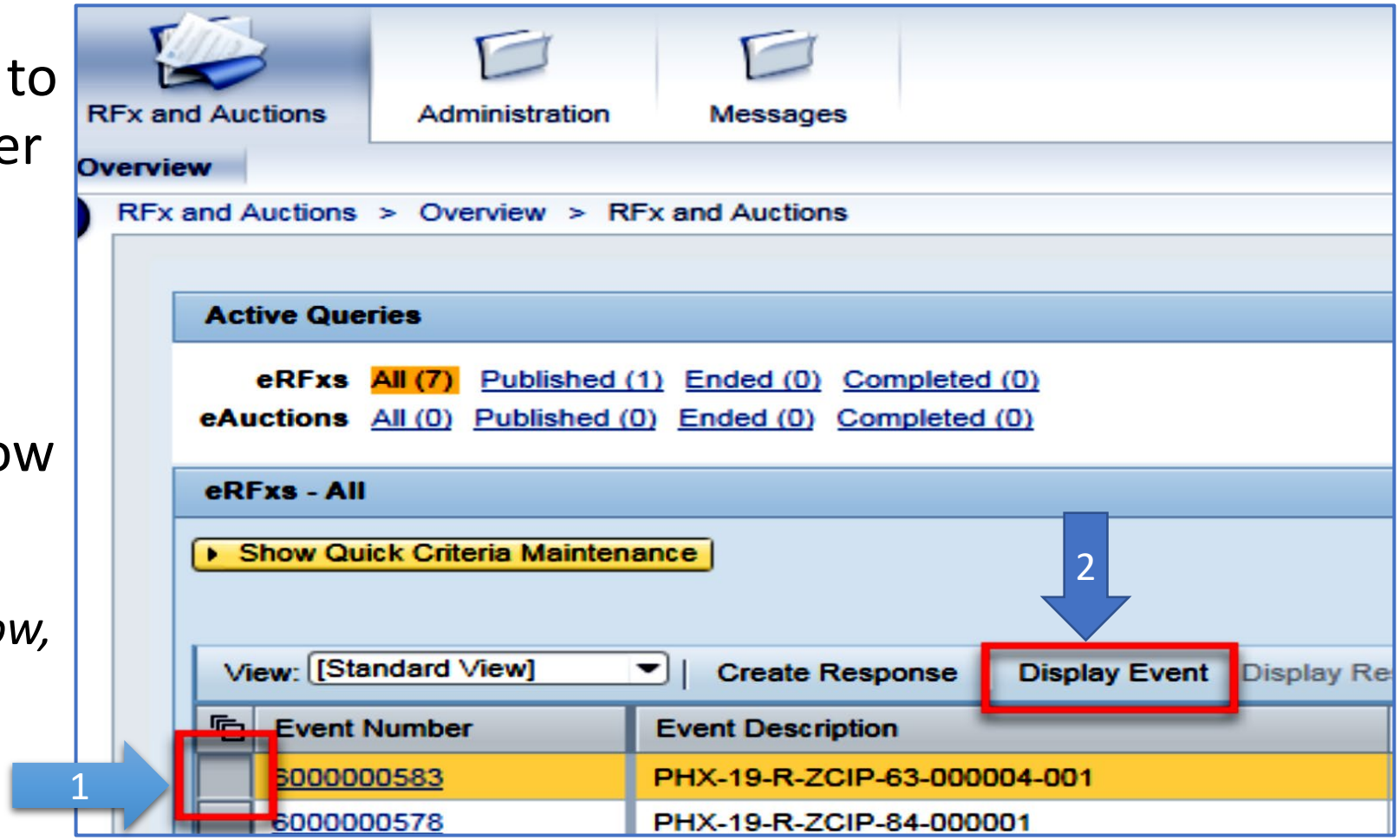
View Selected Solicitation

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

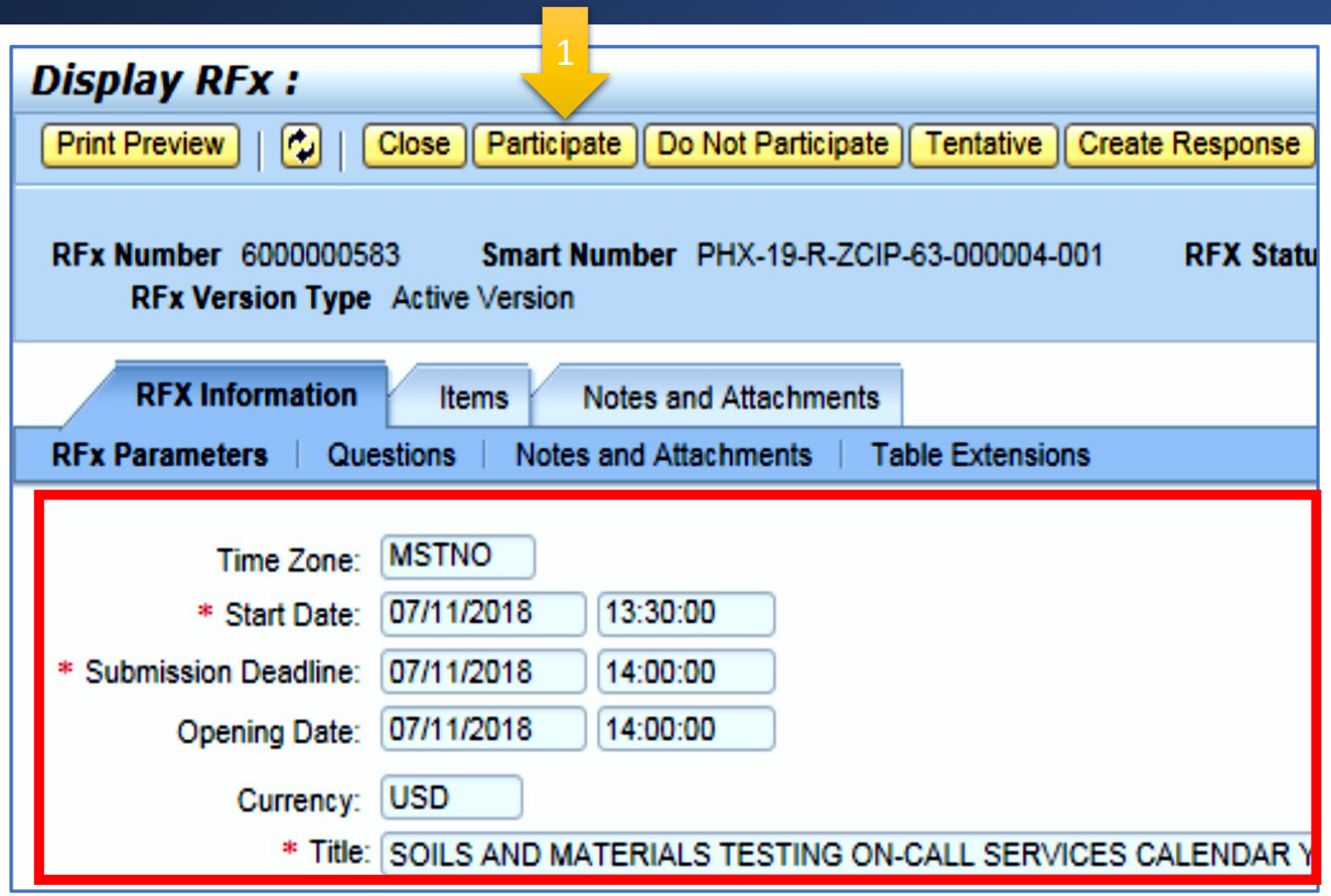
2. Click **Display Event**

This will open a new window to view the selected RFx

If you don't see the new window, check your **POP-UP BLOCKER.**



Would you like updates on this solicitation?



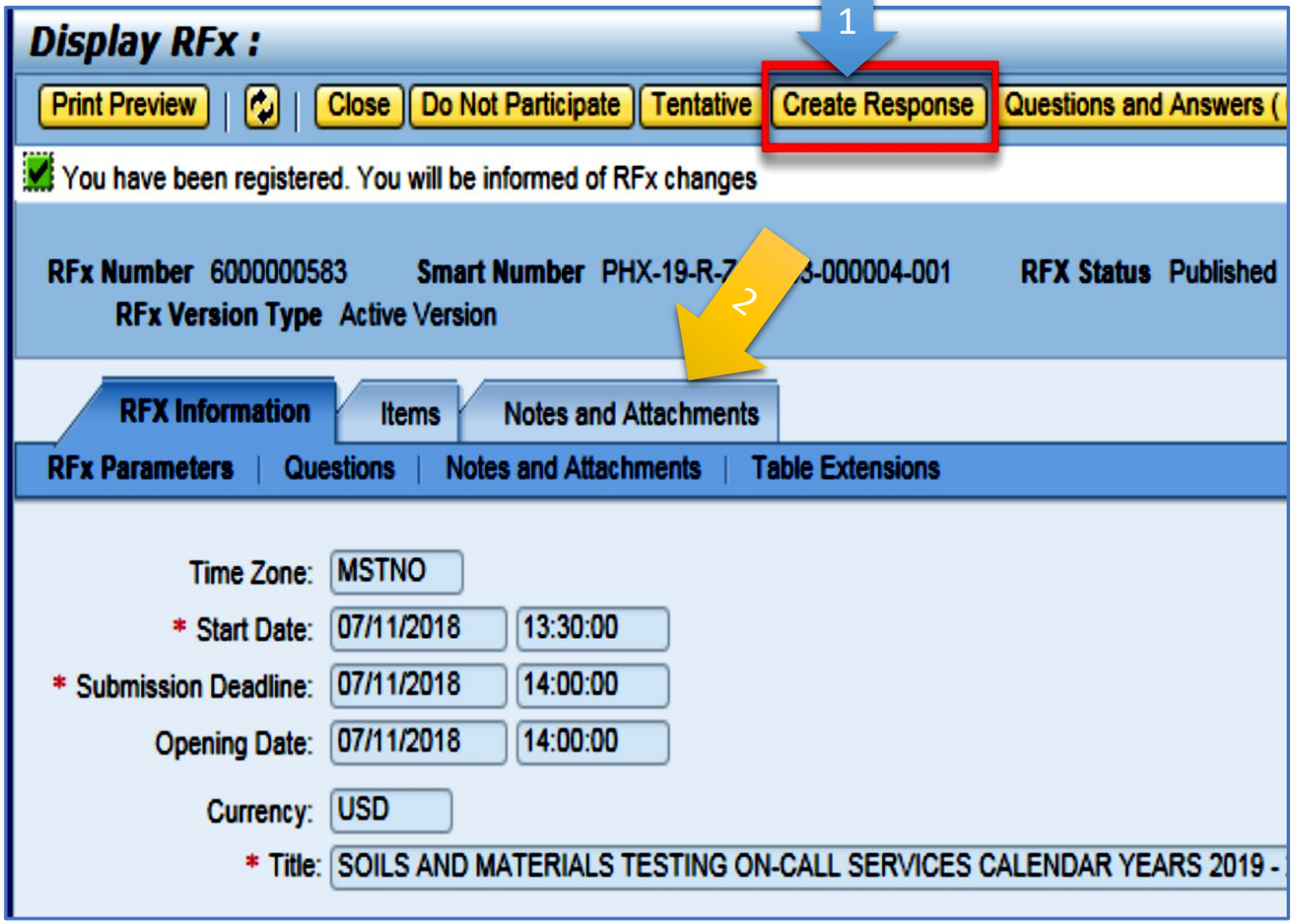
Update your **Participation Status** accordingly

1. Click **Participate**. *This will ensure you to get email notifications regarding your RFx Event, i.e. Notifications, New Attachments.*

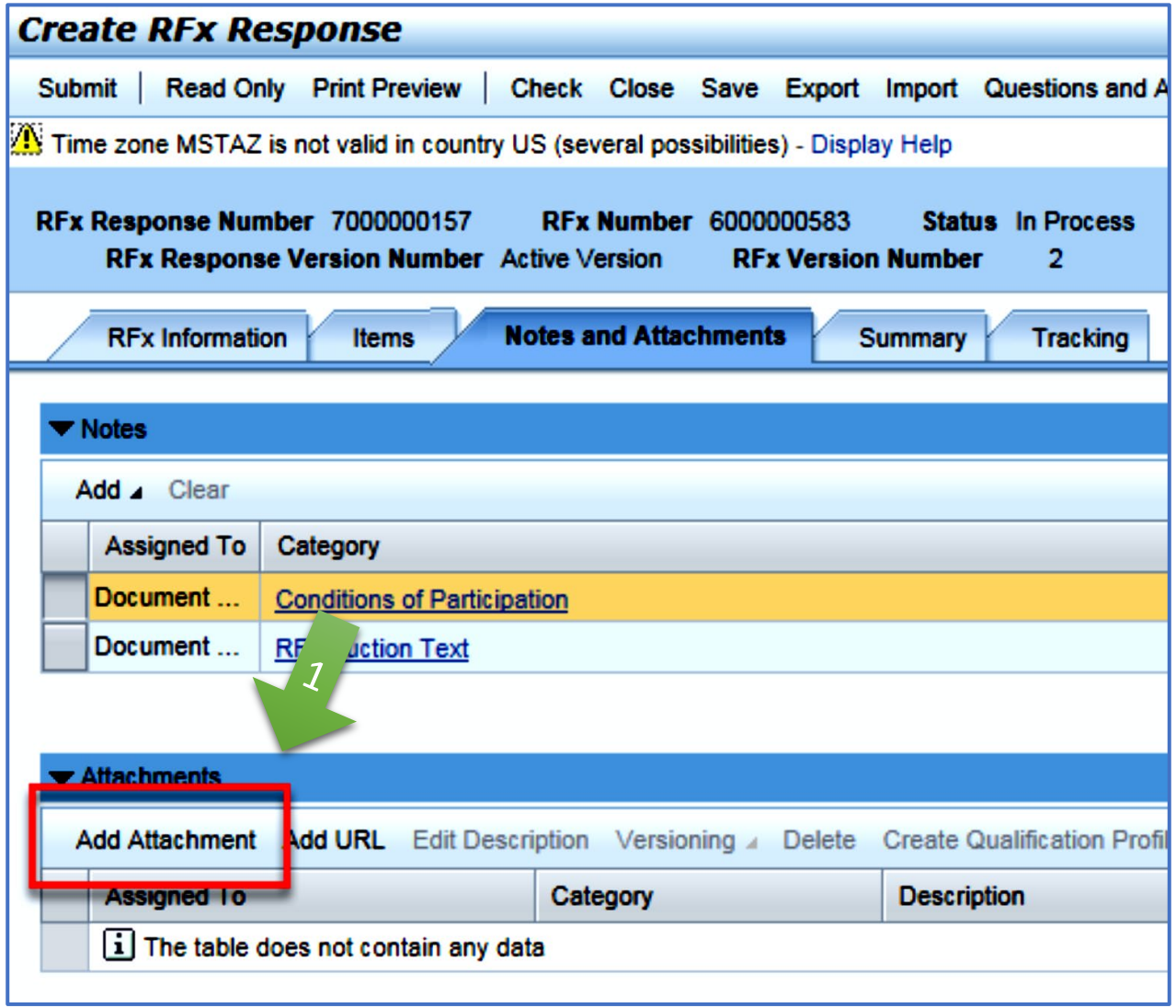
2. Review **RFx Information** Tab for Start/Due dates/ Title of Solicitation

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.*

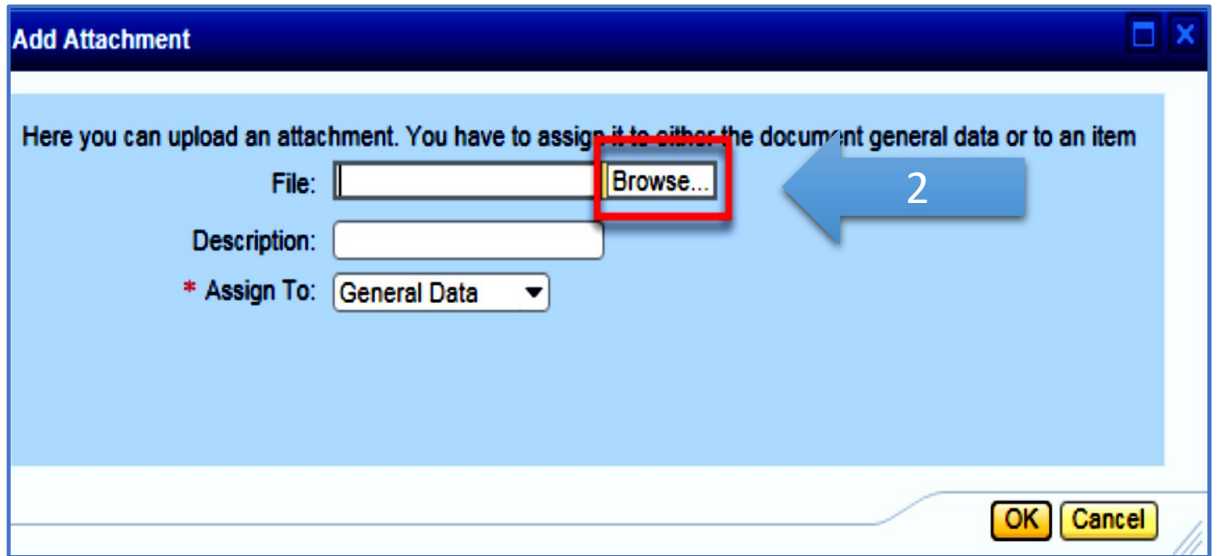


How to upload your SOQ:



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***

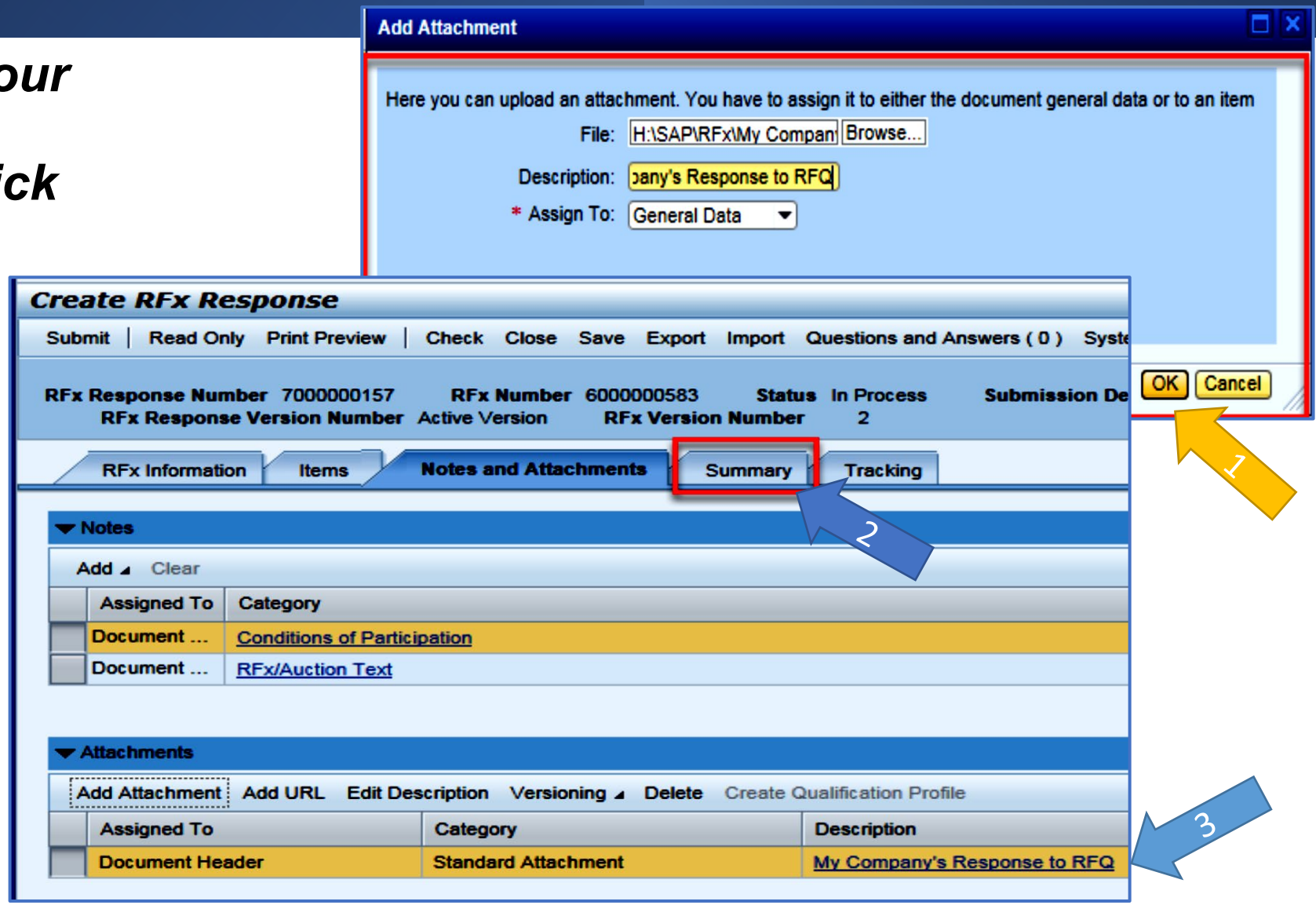


Adding an Attachment

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

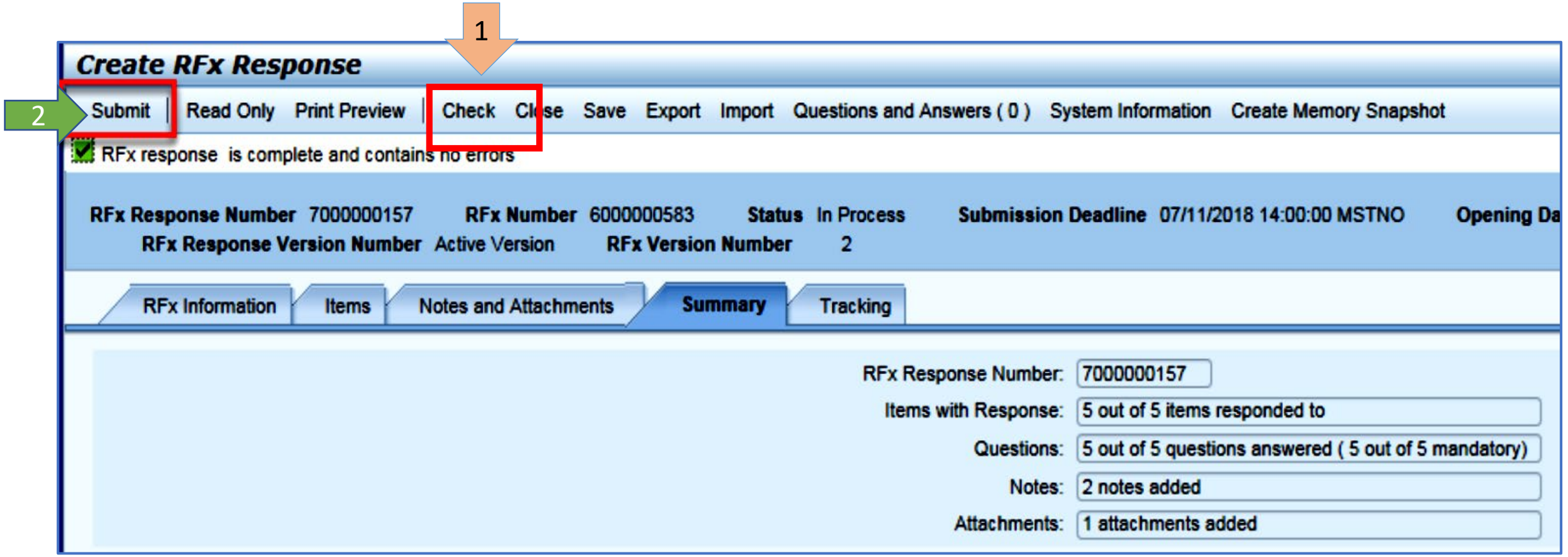
2. ***The Summary Tab provides a high-level overview of your RFx Response***

3. ***Under description click the blue link to double check the file that has been uploaded***



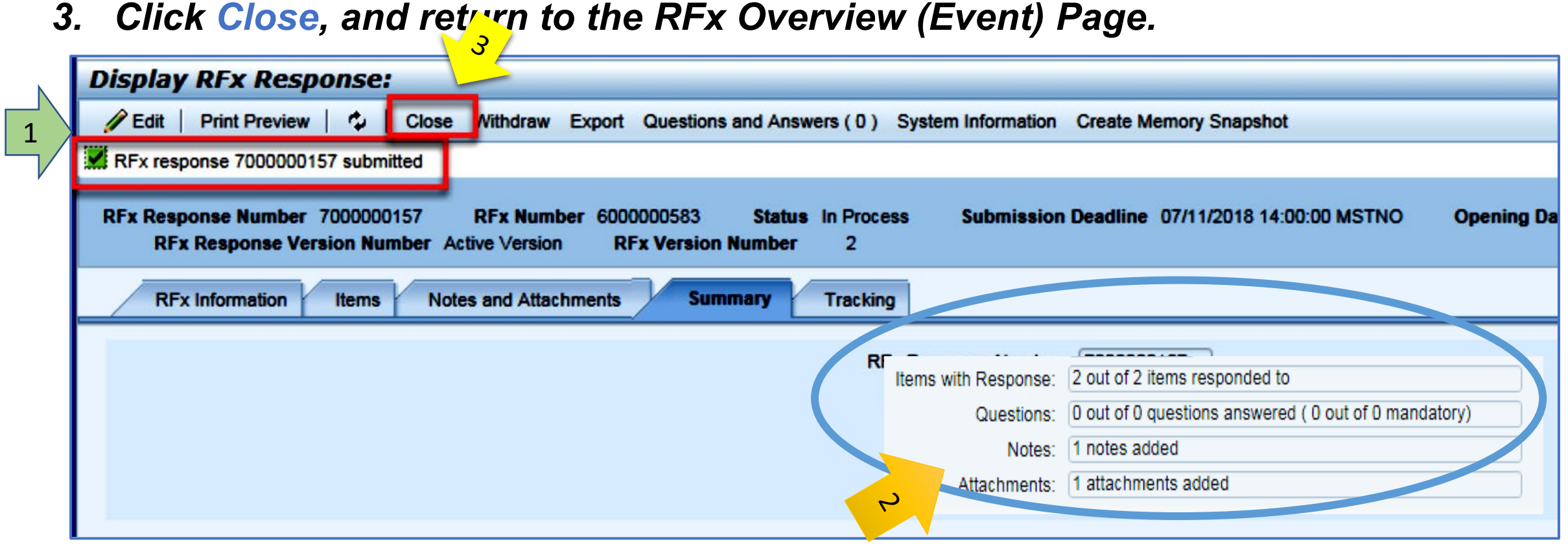
Double Check & Submit

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



RFx Response Submitted

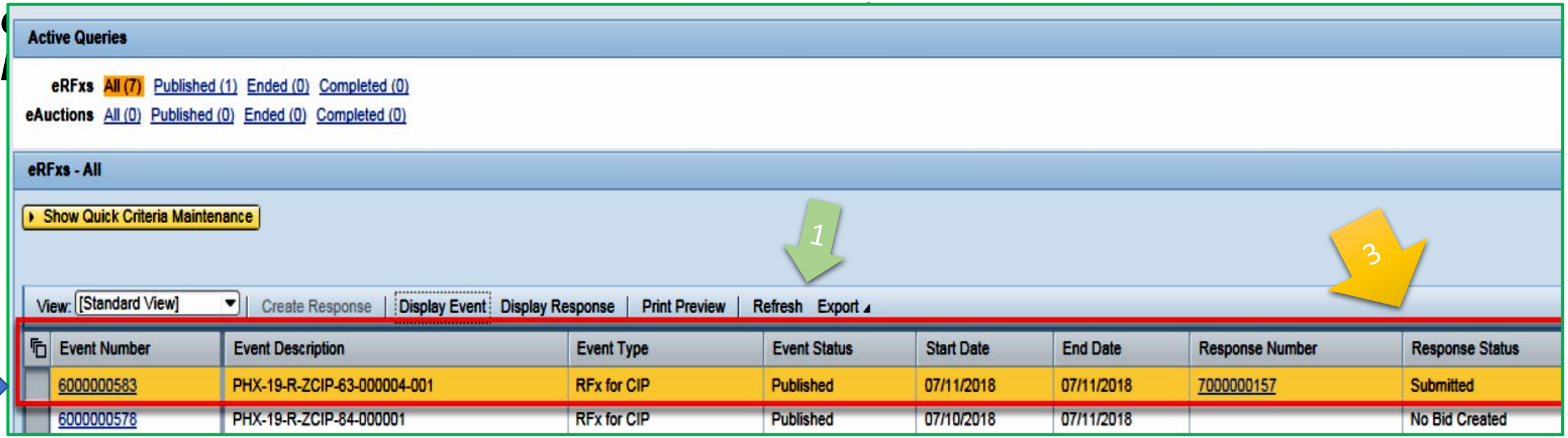
1. *You will see a RFx response message that your response was submitted. No email notification will be sent.*
2. *Confirm you have the required number of attachments listed, as outlined in the RFQ.*
3. *Click Close, and return to the RFx Overview (Event) Page.*



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

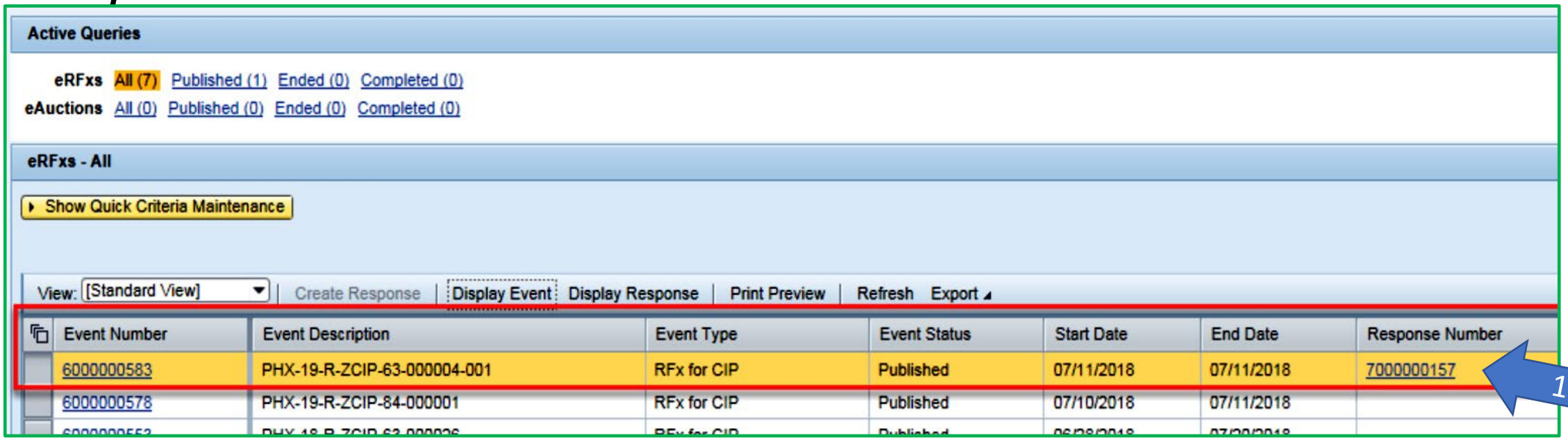


How to Edit Your Submission

The RFx Overview (Event) Page is also where you can find your saved RFx response.

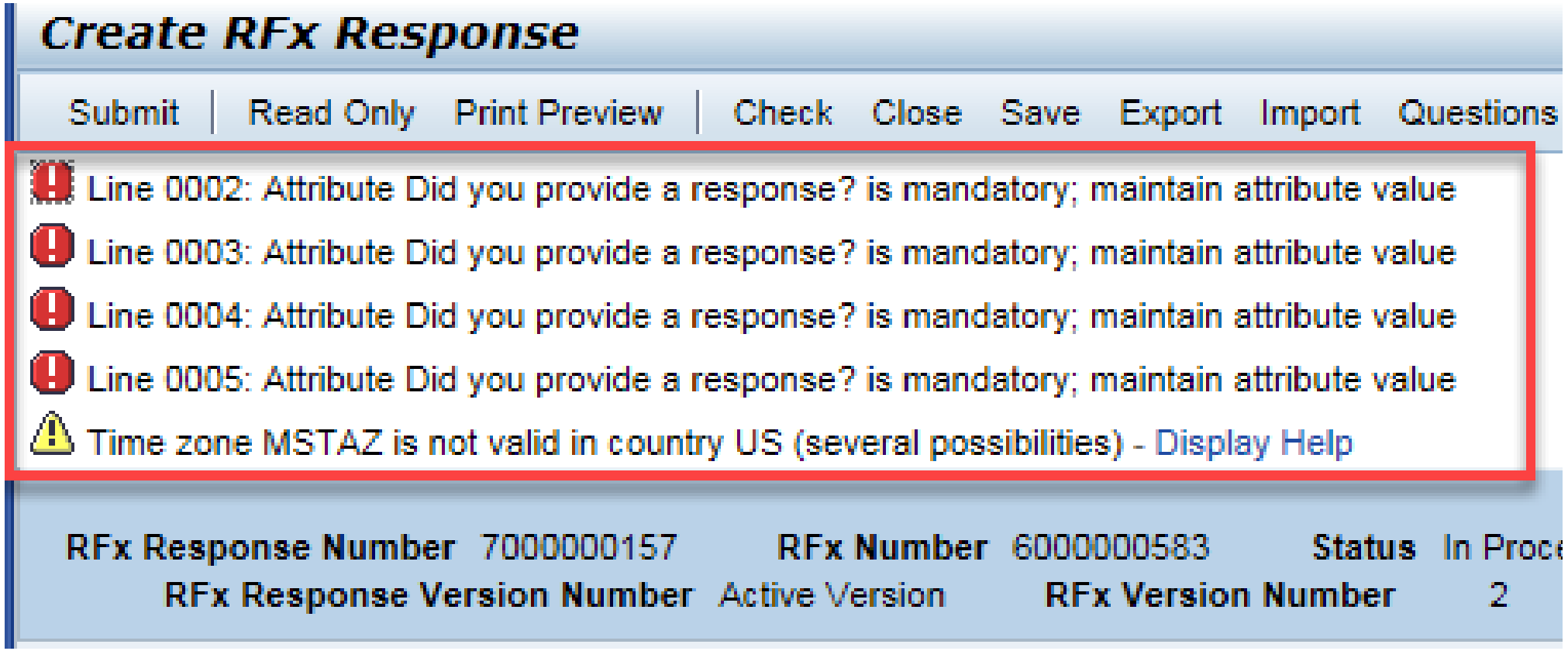
Locate the desired RFx (Event) Number, and scroll to the right. You will see your RFx response number shown as a hyperlink.

1. ***Click on the hyperlink, a new window will pop up to allow you to edit your RFx response.***



Frequently Asked Questions

When I submit, what does the red circle mean?	When I submit, what does the yellow triangle mean?	When I submit, what does the green square mean?
• Error on page and nothing will be submitted	• Typically, a time zone error, information will still be submitted	• Verify information is correct and click submit



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 Information Sheet:

- 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:
tonja.lepur@phoenix.gov
Or call: 602-256-4107

Reference RFx 6000001496 in your email subject line.