WELCOME

CITY OF PHOENIX

WATER TREATMENT PLANTS GENERAL CONSTRUCTION JOB ORDER CONTRACT 4108JOC226

PROCUREPHX PRODUCT CATEGORY CODE: 912000000 RFx Number: 6000001512



WELCOME AND INTRODUCTIONS

D

City of Phoenix Representatives

Liz Blakley, Contracts Specialist II Point of Contact for Submittals and RFQ Questions Office of the City Engineer elizabeth.blakley@phoenix.gov (602) 495-3654

Shaw Chao, PE, Project Manager Water Services Department

Karina L Matthiessen, Point of Contact for SBE Requirements and Questions Equal Opportunity Department business.relations.eod@phoenix.gov (602) 261-8873



AGENDA

- Meeting Overview
- What is Job Order Contracting
- Job Order Contract (JOC) Description
- EOD Overview and SBE Program Requirements
- Scope of Work
- SOQ Evaluation Criteria / RFQ Overview
- Selection Process
- Submittal Requirements / Disqualification
- Selection Schedule / Important Dates
- DCP Procurement Webpages
- ProcurePHX and RFX Overview
 - Vendor Registration
 - ProcurePHX for RFx Electronic Submittal
- Questions After Today



MEETING OVERVIEW

To be added to the Attendance Sheet, send an email by 5:00 PM today to elizabeth.blakley@phoenix.gov with the following: RFX 6000001512 Attendance, your Name, Firm Name, Phone Number, and E-mail address

The Attendance Sheet, PowerPoint and Notification will be posted on City of Phoenix's ProcurePHX system at: (RFX 600001512)

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

AND posted on City of Phoenix's Procurement website:

https://solicitations.phoenix.gov

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

This is your <u>ONLY</u> opportunity to discuss this solicitation with City staff.



Brief overview for online registration and procurePHX accessibility

Have you signed up?

procurePHX



REGISTRATION HELP



Call Help Desk (602) 262-1819 Email Help Desk vendor.support@phoenix.gov



BECOME A VENDOR



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.



VENDOR REGISTRATION

- All Firms MUST be registered in the Vendor Management System
 PRIOR TO SUBMITTING A SOQ
- Information on how to register with the City is available at:

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

- New Firms After Registering, the City will send an e-mail with a vendor number in approx. 2 days
- If your firm is already registered with the City of Phoenix's ProcurePHX system, login and access the electronic solicitation at:

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

- Product Category Code is: 91200000
- RFx Number is: 6000001512
- The VENDOR NUMBER is to be included on the cover of the Statement Of Qualifications



WHAT IS JOB ORDER CONTRACTING

It is an Alternative Project Delivery Method (APDM)
 Based On Qualifications
 Not a Bid
 Projects are on an "As-Needed" basis



JOC DESCRIPTION

- Seeking qualified contractors on as-needed basis
- □ Up to two contractors may be selected for a contract
- JOC for 36-month duration or complete utilization of initial contract value w/ one 24-month option to extend and increase capacity
- Job Order Agreements (JOAs) may be executed up to \$4,000,000 each in construction costs
- □ Must be able to bond up to \$4M per JOA



EOD OVERVIEW AND SBE REQUIREMENTS

Karina L Matthiessen, Point of Contact for SBE Requirements and Questions Equal Opportunity Department business.relations.eod@phoenix.gov (623) 760-8052



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.





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:

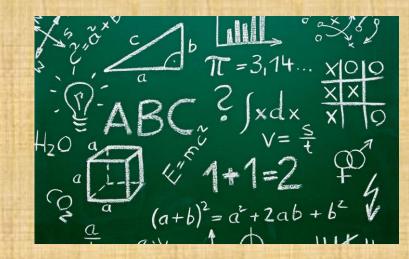
- Solicitation
- Bid Verification
- Subcontractors Approval
- Compliance Monitoring
- Sanctions and Penalties





Required SBE Goal: 4%

1. At time of JOA: Proposed \$ to SBEs 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



noliance.com

SBE Requirements @ Solicitation: None!

SBE Requirements Post-Award: Use SBEs and Report

Eligible SBEs can be found at. 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.



SMALL BUSINESS SUB-CONTRACTING GOAL

- SBE REQUIREMENT IS 4%
- THIS SOLICITATION IS OPEN TO ALL CONTRACTORS
- 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



Karina L Matthiessen, Program Assistant Point of Contact for SBE Requirements and Questions Equal Opportunity Department business.relations.eod@phoenix.gov (623) 760-8052



PROJECT MANAGER

Shaw Chao

SCOPE OF WORK

Providing Water Treatment Plants General Construction Job Order Contracting (JOC) Services on a on-call basis. Services will consist of but not be limited to:

- General work such as building modifications, painting, specialized maintenance and concrete, masonry, or structural steel work.
- Installations and/or replacement of mechanical equipment, such as well and booster pumps, chemical feed equipment, valves and/or actuators.
- Installations of instrumentation and electrical equipment, such as analyzers, meters, sensors, variable frequency drives, Programming Remote Terminals Units (RTUs), and Programmable Logic Controllers (PLCs).
- Emergency repair services.
- Engineering design services when necessary or required
- · Waterline repair, replacement, or rehabilitation.

SCOPE OF WORK

The five water treatment plants are:

- Lake Pleasant WTP
- 24th Street WTP
- Deer Valley WTP
- Union Hills WTP
- Val Vista WTP

Chlorine Room



Replace Chlorine Room Chlorinators



Replace Chlorine Evaporators and Equipment

Chlorine Room (Part 2)

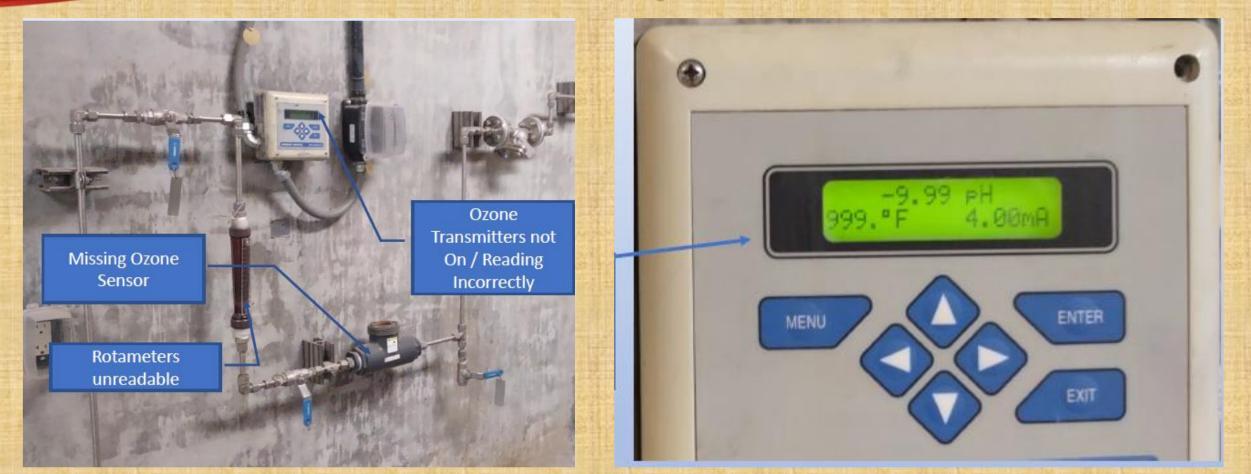


Replace Chlorine Room Injectors



Replace PRV and Chlorine Piping

Ozone System



Existing Ozone System Sensors are not working correctly. All existing Ozone System Sensors will be replaced.

Ozone System (Part 2)



Ozone Generator No. 2 out of Service – No Redundant Ozone System



Improvements are needed for the entire Ozone System



SOQ EVALUATION CRITERIA

Maximum number of Points 1,000

A. General Information (150 pts.)
B. Experience and Qualifications of the Firm (250 pts.)
C. Experience of Key Personnel to be Assigned (250 pts.)
D. Approach to Performing the Required Services (350 pts.)

Reference Checks (21 Points Maximum) These points are in addition to the 1,000 points for the SOQ • Provide responses in the order listed in RFQ • Be complete, be concise SELECTION PROCESS • Each SOQ will be evaluated according to the evaluation criteria in the RFQ.

 Up to two contractors may be selected to enter into a contract.

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



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 electronically through the ProcurePHX online portal by the due date and time

Violating "Contact with City Employees" policy

Failure to submit Bonding Statement

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 8¹/₂" x 11"; 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 noted above

Selection Process

Each SOQ will be evaluated according to the evaluation criteria in the RFQ. A contract will be executed upon completion of negotiations of contract terms and City Council approval.



CONTRACTOR OF TAXABLE CONTRACTOR OF TAXABLE PARTY.

SELECTION SCHEDULE

SOQs Due...... December 15, 2023 Notice of Award...... January 2024 Job Order Workshop...... January 2024



DCP PROCUREMENT WEBPAGES

https://www.phoenix.gov/streets/procure ment-opportunities/



City of Phoenix	τ .			Convention Public Mee	Center tings
	Search			Q	
PHX At Your Service	PHX Pay Online	Map It	Find Public Records	PHXTV	Translate
City of Phoenix > Street Transportation	on > 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/notification on the City of Phoenix website for downloading. Interested parties can download the information and print at their own offices or copy the information to a disk and take to any reprographics company of their choice.

Other Useful Resources

碞 Protest Policy

Submit Protest to City Clerk

Submitter's Handbook

Public Records Request

SBE/DBE Directory



DCP PROCUREMENT WEBPAGES

HTTPS://WWW.PHOENIX.GOV/STREETS/PROCUREMENT-OPPORTUNITIES

- Current Opportunities:
 - Project-specific RFQs, Notifications, Sign-in Sheets, Presentations https://solicitations.phoenix.gov
- Project Interviews, Bid Results, and Project Selections: <u>https://solicitations.phoenix.gov/awards</u>
- The ProcurePHX online portal will be used for <u>Solicitations</u> only
 <u>https://eprocurement.phoenix.gov/irj/portal</u>



QUESTIONS AFTER TODAY?

> Stay for ProcurePHX Overview otherwise,

THANK YOU FOR ATTENDING!!! Email all questions to: elizabeth.blakley@phoenix.gov

Reference RFx Number: 600001512 in your email subject line

Or Call Liz Blakley at: (602) 495-3654

QUESTIONS





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: 912000000 RFx (Event) Number is: 6000001512

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

procure PHX	
	User * Password * Log On
	Logon Problems? Get Support



RFX TIPS

Brief overview for online submissions

- Click "Refresh" often
- Make sure your Pop-Up blocker is turned OFF
- Application is accessible with Google Chrome (NOT Explorer)
- When in the application, check for Notifications and other uploads by scrolling to the far right until you see a vertical ribbon. Then scroll down on the ribbon.
- 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.



CONTRACTOR OF TAXABLE INCOME. WILLIAM

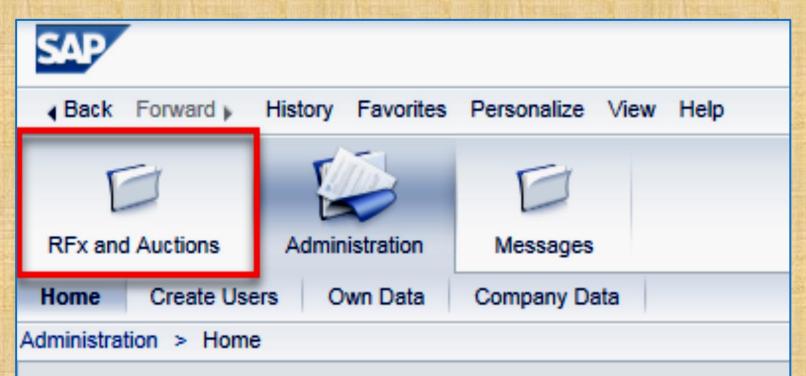
RFX HOME SCREEN - LOGIN

Once you are logged in to ProcurePHX portal:

https://eprocurement.pho enix.gov/irj/portal

Select RFx and Auctions tab on the 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



THE OWNER OF TAXABLE PARTY OF TAXABLE PARTY.

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FINDING SOLICITATIONS

Click **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: 6000001512

Fx and Auctions Administration	Messages							
erview								
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 Mainte	nance							
View: [Standard View]	Create Response Display Event Display R	esponse Print Preview	Refresh Ex					
Event Number	Event Description	Event Type	Event Sta					
600000583	PHX-19-R-ZCIP-63-000004-001	RFx for CIP	Published					



A REAL PROPERTY AND INCOME.

VIEW SELECTED SOLICITATION

	D	D							
RFx and Auctions A	Administration	Messages							
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View: [Standar	rd View] ■	Create Response	Display Event	Display Re					
		- 1	Display Event	Display Re					
Event Num	ber	Event Description							
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60000057	8	PHX-19-R-ZCIP-84-0	00001						

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

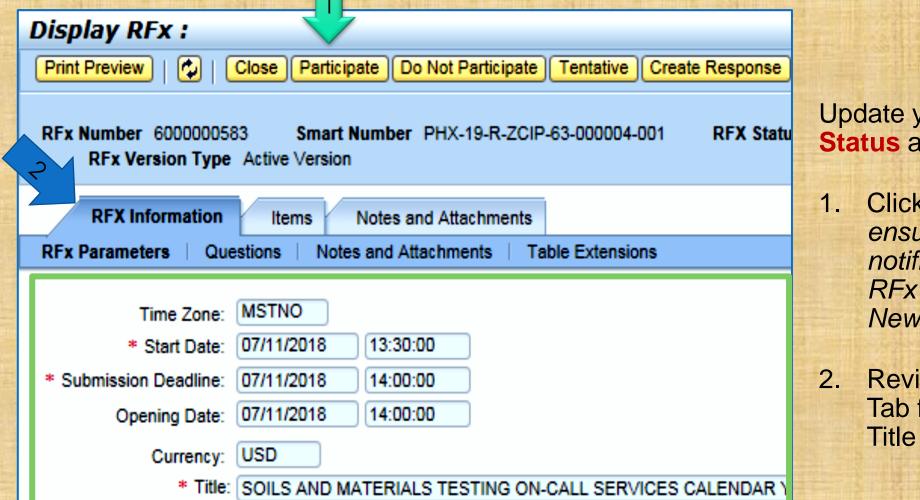
2. Click Display Event

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 Tentative	Create Response	Questions and Answers (
📕 You have been registere	You have been registered. You will be informed of RFx changes								
RFx Number 6000000583 Smart Number RHV 2-ZCIP-63-000004-001 RFX Status Published RFx Version Type Active Version									
RFX Information	Items Notes and Attachments								
RFx Parameters Que	stions Notes and Attachments T	able Extensions							
	METHO								
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	N-CALL SERVICES (ALENDAR YEARS 2019 -						



HOW TO UPLOAD YOUR SOQ

- 1. Attach SOQ by clicking Add Attachment
- 2. Click **Browse** in the pop up window to navigate to the desired attachment document

Add Attachment		×
Here you can upload an attac File:	hment. You have to assign it to either the document general data or to an item Browse	
Description: * Assign To:	General Data	
* Assign 10.		
	OK Cancel	

Create RFx Re	esponse
Submit Read On	nly Print Preview Check Close Save Export Import Questions and A
Time zone MSTAZ	is not valid in country US (several possibilities) - Display Help
•	nber 7000000157 RFx Number 6000000583 Status In Process se Version Number Active Version RFx Version Number 2
RFx Information	on Items Notes and Attachments Summary Tracking
▼ Notes	
Add Clear	
Assigned To	Category Category
Document	Conditions of Participation
Document	RFx/Auction Text
▼ Attachmet	
Add Attachment	Add URL Edit Description Versioning a Delete Create Qualification Profi
Assigned to	Category Description
i The table of	does not contain any data



ADDING AN ATTACHMENT

	Add Attachment
 Once you've selected your document, add a Description and then click OK 	Here you can upload an attachment. You have to assign it to either the document general data or to an item File: H:\SAP\RFx\My Compan Browse Description: pany's Response to RFQ * Assign To: General Data •
Create RFx Response Submit Read Only Print Preview Check Close Save Export Import Questions and Ar	nswers (0) Syste
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 Votes Add 4 Clear Clear Clear	Submission De 2. The Summary Tab provides a high- level overview of your RFx Response
Assigned To Category Document Conditions of Participation Document RFx/Auction Text	3. Under description click the <u>blue link</u> to double check the file that has been uploaded
Add Attachment Add URL Edit Description Versioning ⊿ Delete Create Qualification Profile Assigned To Category Description	
Document Header Standard Attachment My Company's R	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
	Submit Read Only Print Preview Check (lose Save Export Import Questions and Answers (0) System Information Create Memory Snapshot
ľ	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: 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
L	



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.

Display RFx Response:	
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 Proc RFx Response Version Number Active Version RFx Version Number 2	cess Submission Deadline 07/11/2018 14:00:00 MSTNO Opening D
RFx Information Items Notes and Attachments Summary Tracking	ing
R	RFx 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
	2



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 a step(s) before the system will update your RFx response to Submitted.

[Act	ive Queries							
			(1) Ended (0) Completed (0) 0) Ended (0) Completed (0)						
	eRI	Fxs - All							
	• 5	Show Quick Criteria Maintenance							
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	6	Event Number	Event Description	Event Type	Event Status	Start Date	End Date	Response Number 3	Response Status
		<u>6000000583</u>	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 (1) Ended (0) Completed (0)							
Auctions <u>All (0)</u> Published	(0) Ended (0) Completed (0)						
RFxs - All							
Show Quick Criteria Mainte	nance						
View: [Standard View]	Create Response Display Event Di	isplay Response Print Preview	Refresh Export				
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		
		PEv for CID	Dublished	06/09/0049	07/00/0049		



When I submit, what does the <u>red</u> 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

Create RFx Response

 Submit
 Read Only
 Print Preview
 Check
 Close
 Save
 Export
 Import
 Questions

 II
 Line 0002: Attribute Did you provide a response? is mandatory; maintain attribute value

 II
 Line 0003: Attribute Did you provide a response? is mandatory; maintain attribute value

 II
 Line 0004: Attribute Did you provide a response? is mandatory; maintain attribute value

 II
 Line 0005: Attribute Did you provide a response? is mandatory; maintain attribute value

 II
 Line 0005: Attribute Did you provide a response? is mandatory; maintain attribute value

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 Line 0005: Attribute Did you provide a response? is mandatory; maintain attribute value

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 Line 0005: Attribute Did you provide a response? is mandatory; maintain attribute value

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

RFX FREQUENTLY ASKED QUESTIONS