



Pre-submittal meeting

CITY OF PHOENIX
Public Works Department

PROJECT PW26480024

PROCUREPHX PRODUCT CATEGORY CODE: 912000000

RFx Number: 6000001540

JANUARY 25, 2023

Welcome and Introductions

- Ruth Spear, PE, Mechanical Engineer, Vertical Project Manager
- James Gorombej, Energy Management Specialist, Public Works Department
- Kandi Kawolsky, Procurement Manager, Design and Construction Procurement

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

Sign-in sheet and PowerPoint will be posted on City of Phoenix's ProcurePHX system (RFx: 6000001540):

<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.

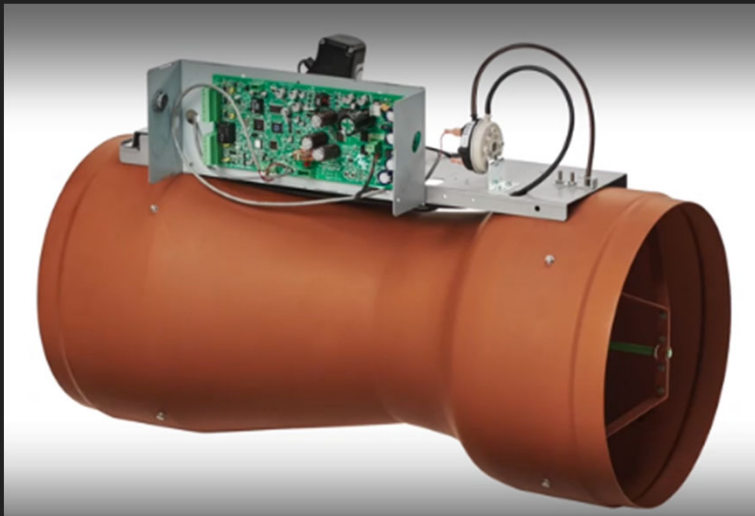
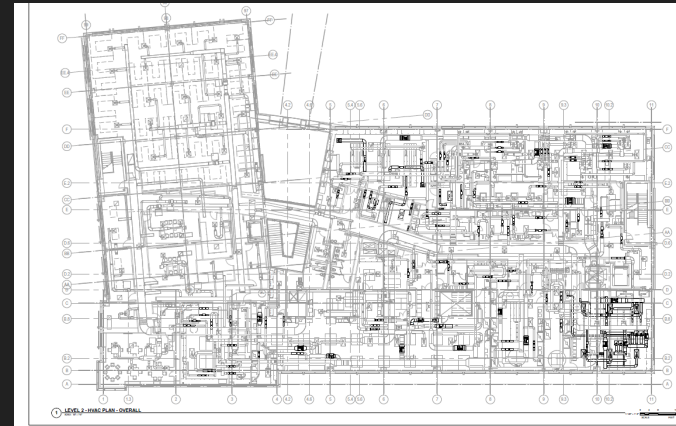
Project Description/Background

Scope: Install new air flow valves in all labs

New Lab Control System to be Phoenix Controls

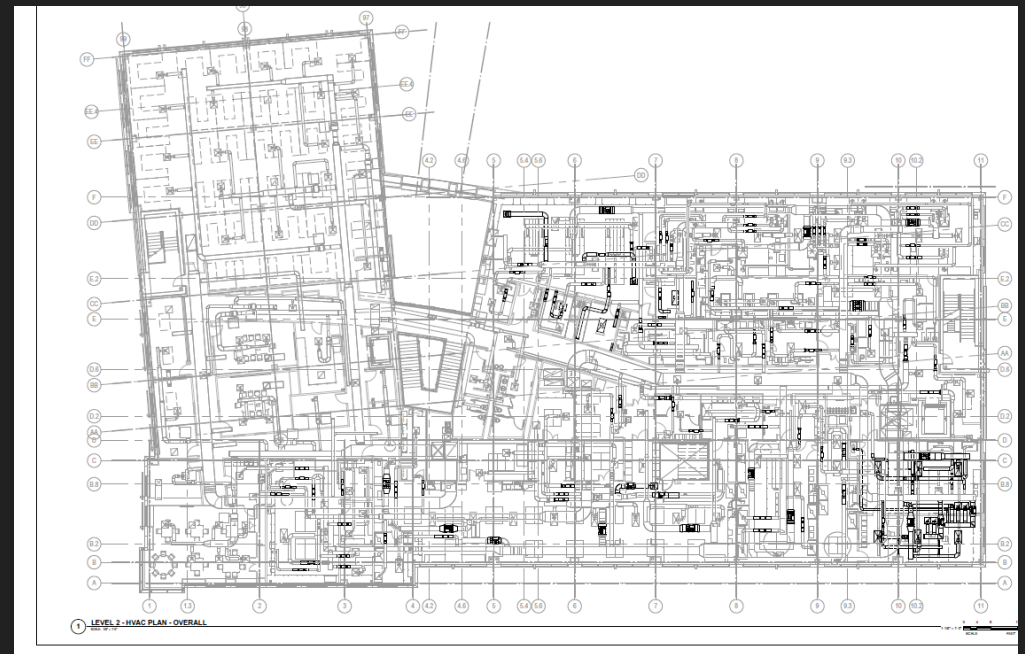
New Energy Management System by Trane

Floorplan shown is typical of 3



Project Description/Background

- Repair and replace equipment to ensure the building has proper control of airflows within the laboratories, fume hoods and biosafety cabinets.
- The currently installed Triatek laboratory HVAC and BAS was evaluated and several critical deficiencies were discovered. The Triatek system will be obsolete soon and needs to be replaced.



Floorplan shown is typical of 3

Scope of Work / Services

- Provide management services to work with engineering staff and owner representatives to develop 100% construction drawings for the following:
 - Demo existing malfunctioning Triatek lab air pressure control system and replace with new Phoenix Controls. Demo existing Siemens Building Automation System (BAS) and replace with new Trane BAS. Integrate building and lab space pressurization control utilizing native BACnet communication protocol.
 - Provide full HVAC and hydronic commissioning per engineered specifications and deliver report as part of the closeout package.
 - Provide necessary construction services per engineering and specifications.
 - Drawings are 80%. Need to develop construction schedule and finish drawings with input from contractor.

Scope of Work / Services

- Controls installation will likely require both old and new systems to be operational until project completion.
- Must have a plan for working in an occupied building. Installation has to be phased so that only a few labs are down at a time. Schedule must be coordinated with Police Staff.
- All contractors will be required to do a DNA swab with the Police Department.
- Building is a Bio Safety Level 2 building. Contractor should be familiar with work practices for buildings with biosafety classification.
- When working in the labs, conformance to standard microbiological practices, including primary barriers, negative pressurization and personal protective equipment will be required.



QUESTIONS

FOR THE PROJECT MANAGERS
RUTH SPEAR AND JAMES GOROMBEI

SOQ Evaluation Criteria

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

- General Information (150 points)
 - Experience and Qualifications of the Firm (250 points)
 - Experience of Key Personnel to be Assigned (250 points)
 - Understanding and Approach (350 points)
- ❖ Reference Checks (up to an additional 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

15 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
- Violating "Contact with City Employees" policy

Selection Process

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



Firms will be short-listed to interview



One 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	January 25, 2024
SOQs Due	February 9, 2024
Interview Shortlist Notification	February 27, 2024
Interviews	March 11, 2024
Selection Notification	Mid-March 2024
Scope of Work Meeting	Late March 2024

Procurement Website

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

Solicitations Website

Procurement Newsletter

Submitter's Handbook

The screenshot shows the City of Phoenix website's procurement page. At the top, there is a blue header with the City of Phoenix logo and name, and a yellow banner for 'Convention Center Public Meetings'. Below the header is a search bar and a navigation menu with links for 'PHX At Your Service', 'PHX Pay Online', 'Map It', 'Find Public Records', 'PHXTV', and 'Translate'. The breadcrumb trail reads 'City of Phoenix > Street Transportation > Procurement Opportunities'. The main heading is 'Consulting & Construction For Capital Improvement Programs'. The text describes the contracting process and includes a notice: '*EFFECTIVE MONDAY, MARCH 11, 2019 ALL DESIGN AND CONSTRUCTION PROCUREMENT WEB PAGE LINKS NOW DIRECT TO THE MAIN CITY OF PHOENIX SOLICITATIONS PAGE.' Below this are sections for 'Current Opportunities', 'Project Interviews', 'Bid Results and Project Selections', and 'Subscribe to Procurement Newsletter'. A notice states: '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.' At the bottom, there is a section for 'Other Useful Resources' with links for 'Protest Policy', 'Submit Protest to City Clerk', 'Submitter's Handbook', 'Public Records Request', and 'SBE/DBE Directory'.

City of Phoenix

Convention Center Public Meetings

Search...

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-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 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 PHOENIX 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 responsibility of any received bids. Project Selections identify firms to be awarded professional services and construction opportunities 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

- Protest Policy
- [Submit Protest to City Clerk](#)
- Submitter's Handbook
- Public Records Request
- SBE/DBE Directory

City of Phoenix Solicitations Website



City of Phoenix Solicitations 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:

Number Title Department NIGP Code

Solicitation number "contains" searched term

Search Clear

Limit to NIGP...

All

Clear

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

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

<https://solicitations.phoenix.gov>

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

REGISTRATION HELP



Call Help Desk
(602) 262-1819

Email Help Desk
vendor.support@phoenix.gov



Have you signed up?

BECOME A VENDOR



1. Gather Your Business Info
2. Scan Your Signed W-9
3. Register in System *Steps to Success!*
4. Set-Up ID & Password

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

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

A screenshot of the ProcurePHX login page. The page features the ProcurePHX logo in the top left corner. Below the logo, there are two input fields: one for 'User *' and one for 'Password *'. To the right of the password field is a 'Log On' button. At the bottom left of the login area, there is a link for 'Logon Problems? [Get Support](#)'.

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: **912000000**

Rfx (Event) Number is: **6000001540**

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**

The screenshot displays the SAP ProcurePHX portal interface. At the top left is the SAP logo. Below it is a navigation bar with links: Back, Forward, History, Favorites, Personalize, View, and Help. The main navigation area features three tabs: 'RFX and Auctions' (highlighted with a red box), 'Administration', and 'Messages'. Below these tabs is a secondary navigation bar with links: Home, Create Users, Own Data, and Company Data. A breadcrumb trail below the secondary navigation bar reads 'Administration > Home'. The main content area contains a message: 'Thank you for your interest in becoming a vendor in the... As a Vendor Administrator for your company you have...'

Finding Solicitations

RFx and Auctions Administration Messages

Overview

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 Maintenance

View: [Standard View] | Create Response | Display Event | Display Response | Print Preview | **Refresh** | Ex

Event Number	Event Description	Event Type	Event Sta
6000000583	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: 6000001540

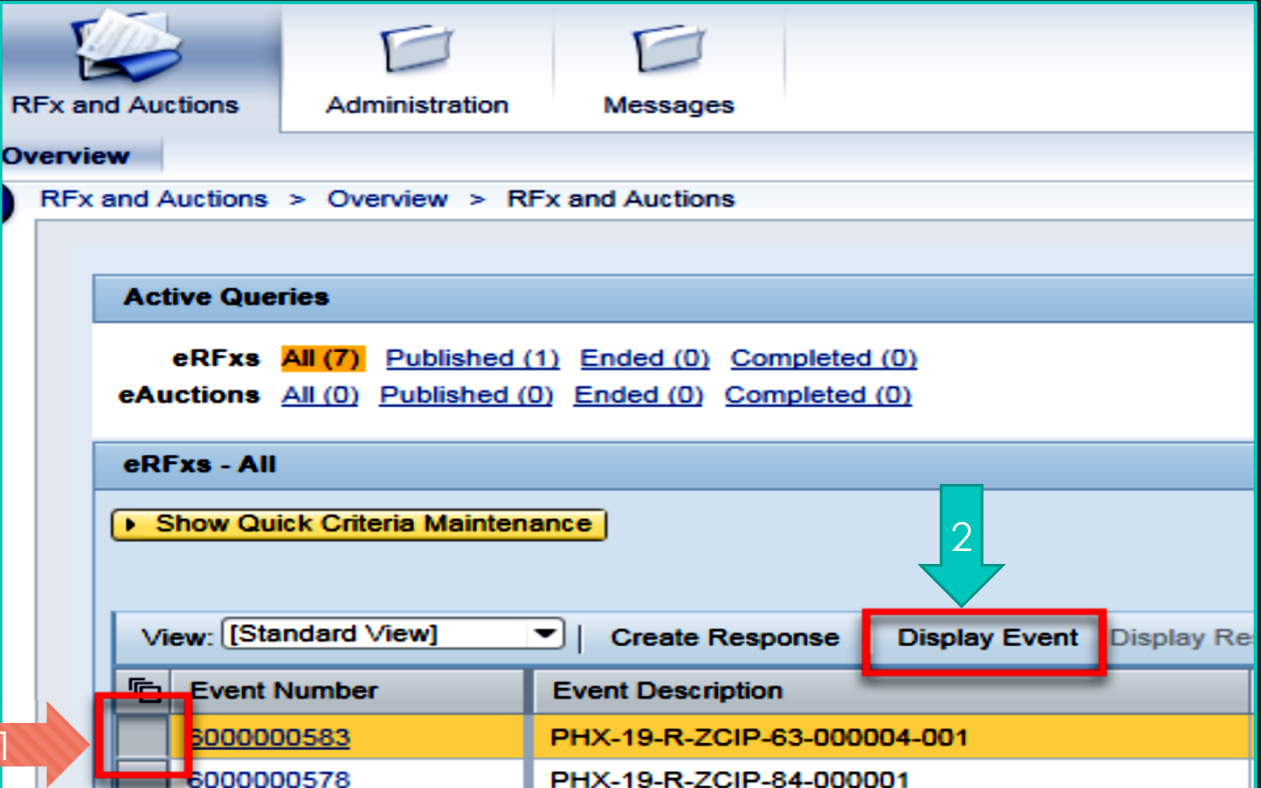
View Selected Solicitation

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

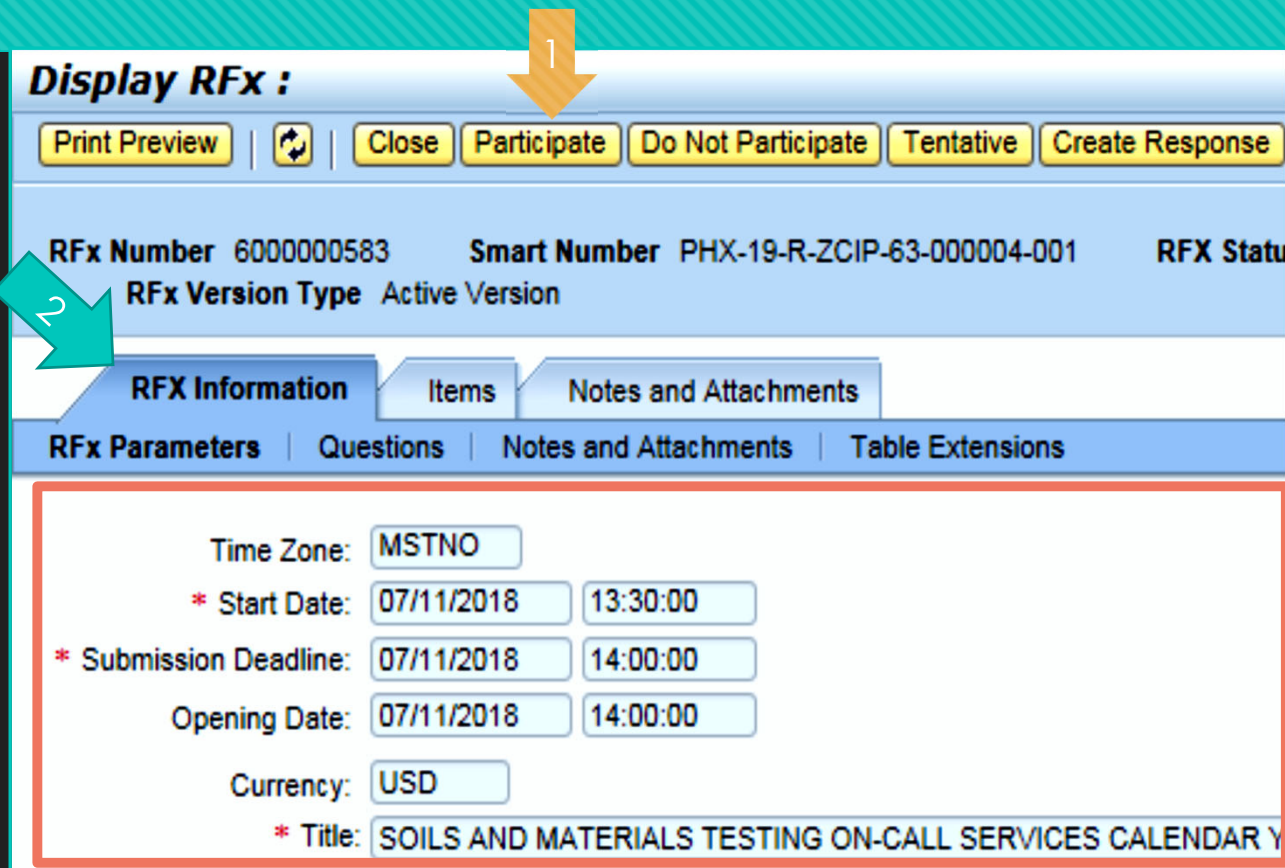
If you don't see the new window, check your **POP-UP BLOCKER.**



The screenshot shows the 'RFX and Auctions' interface. At the top, there are navigation tabs for 'RFX and Auctions', 'Administration', and 'Messages'. Below this is the 'Overview' section, which includes a breadcrumb trail: 'RFX and Auctions > Overview > RFX and Auctions'. The main content area is divided into sections: 'Active Queries' with links for 'eRFxs' (All (7), Published (1), Ended (0), Completed (0)) and 'eAuctions' (All (0), Published (0), Ended (0), Completed (0)). Below this is the 'eRFxs - All' section, which contains a 'Show Quick Criteria Maintenance' button. At the bottom, there is a table with columns 'Event Number' and 'Event Description'. The first row is highlighted in yellow and has a red box around its 'Event Number' cell, with a red arrow labeled '1' pointing to it. The second row is also highlighted in yellow. To the right of the table, there are buttons for 'View: [Standard View]', 'Create Response', 'Display Event' (which is highlighted with a red box and a green arrow labeled '2' pointing to it), and 'Display Re'.

Event Number	Event Description
6000000583	PHX-19-R-ZCIP-63-000004-001
6000000578	PHX-19-R-ZCIP-84-000001

Would you like updates on this solicitation?



The screenshot shows a web interface for displaying an RFX. At the top, there is a header "Display RFX:" followed by a row of buttons: "Print Preview", a refresh icon, "Close", "Participate", "Do Not Participate", "Tentative", and "Create Response". An orange arrow labeled "1" points to the "Participate" button. Below the buttons, the RFX details are displayed: "RFX Number 6000000583", "Smart Number PHX-19-R-ZCIP-63-000004-001", and "RFX Status". Below this, there are tabs for "RFX Information", "Items", and "Notes and Attachments". A teal arrow labeled "2" points to the "RFX Information" tab. Below the tabs, there are sections for "RFX Parameters", "Questions", "Notes and Attachments", and "Table Extensions". A red-bordered box highlights the "RFX Parameters" section, which contains the following fields: "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", and "* Title: SOILS AND MATERIALS TESTING ON-CALL SERVICES CALENDAR Y".

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 :

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-ZC 000004-001 RFX Status Published
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 YEARS 2019 -

How to upload your SOQ

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 Profil

Assigned To	Category	Description
ⓘ 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

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:

OK Cancel

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

The image shows two overlapping windows from a software application. The top window is titled 'Add Attachment' and contains the following text and fields:

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: My Company's Response to RFQ

* Assign To: General Data

At the bottom right of this window are 'OK' and 'Cancel' buttons. An orange arrow labeled '1' points to the 'OK' button.

The bottom window is titled 'Create RFX Response' and shows a menu bar with options: Submit, Read Only, Print Preview, Check, Close, Save, Export, Import, Questions and Answers (0), System. Below the menu bar is a header section with the following information:

RFX Response Number 7000000157 RFX Number 6000000583 Status In Process Submission De
RFX Response Version Number Active Version RFX Version Number 2

Below the header are several tabs: RFX Information, Items, Notes and Attachments, Summary, and Tracking. The 'Summary' tab is highlighted with a red box and a teal arrow labeled '2' points to it.

Under the 'Notes and Attachments' tab, there is a 'Notes' section with a table:

Assigned To	Category
Document ...	Conditions of Participation
Document ...	RFX/Auction Text

Below the 'Notes' section is an 'Attachments' section with a table:

Assigned To	Category	Description
Document Header	Standard Attachment	My Company's Response to RFQ

An orange arrow labeled '3' points to the blue link in the 'Description' column of the 'Attachments' table.

Double Check & Submit

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

The screenshot shows the 'Create RFX Response' interface. A red box highlights the 'Submit' button, with a green arrow labeled '2' pointing to it. Another red box highlights the 'Check' button, with a red arrow labeled '1' pointing to it. Below the buttons, a green checkmark icon is followed by the text 'RFX response is complete and contains no errors'. A table displays RFX details: RFX Response Number 7000000157, RFX Number 6000000583, Status In Process, Submission Deadline 07/11/2018 14:00:00 MSTNO, and Opening Date. Below the table are tabs for RFX Information, Items, Notes and Attachments, Summary, and Tracking. The Summary tab is active, showing 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, and Attachments: 1 attachments added.

RFX Response Number	RFX Number	Status	Submission Deadline	Opening Date
7000000157	6000000583	In Process	07/11/2018 14:00:00 MSTNO	

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

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.

The screenshot shows the 'Display RFX Response' interface. A green arrow labeled '1' points to the 'RFX response 7000000157 submitted' message. A red box highlights the 'Close' button, with a red arrow labeled '3' pointing to it. A red oval highlights the 'Summary' tab and the response details, with a yellow arrow labeled '2' pointing to the 'Attachments' field.

Display RFX Response:

Edit | Print Preview | Refresh | **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

RFx 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

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

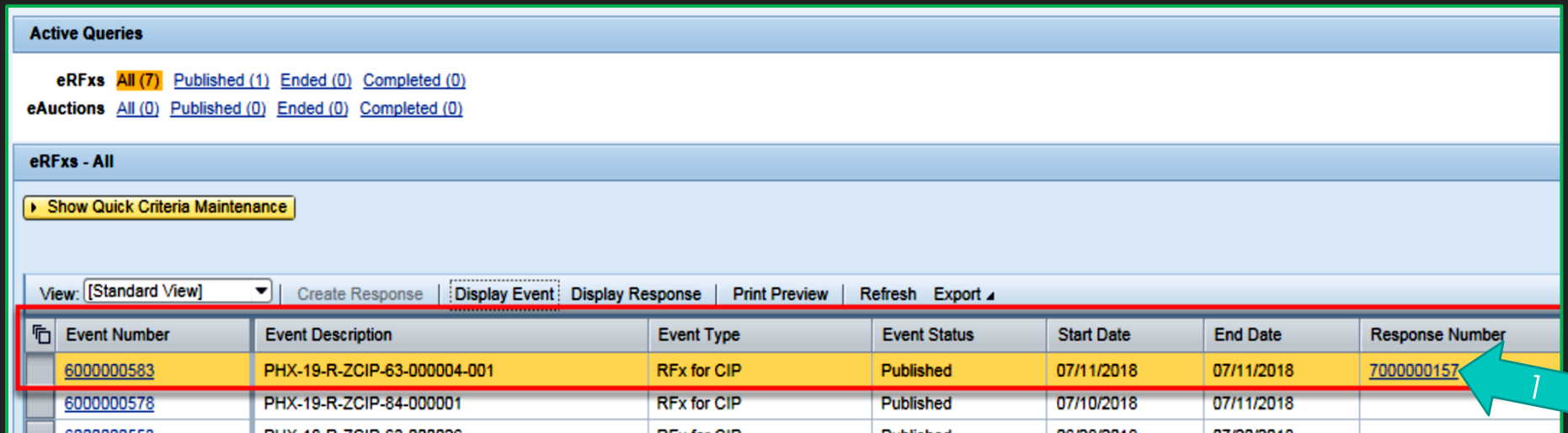
Event Number	Event Description	Event Type	Event Status	Start Date	End Date	Response Number	Response Status
6000000583	PHX-19-R-ZCIP-63-000004-001	RfX for CIP	Published	07/11/2018	07/11/2018	7000000157	Submitted
6000000578	PHX-19-R-ZCIP-84-000001	RfX for CIP	Published	07/10/2018	07/11/2018		No Bid Created

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 \(0\)](#)

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
6000000583	PHX-19-R-ZCIP-63-000004-001	RfX for CIP	Published	07/11/2018	07/11/2018	7000000157
6000000578	PHX-19-R-ZCIP-84-000001	RfX for CIP	Published	07/10/2018	07/11/2018	
6000000552	PHX-19-R-ZCIP-63-000006	RfX for CIP	Published	06/28/2018	07/09/2018	

Frequently Asked Questions

When I submit, what does the **red** circle mean?

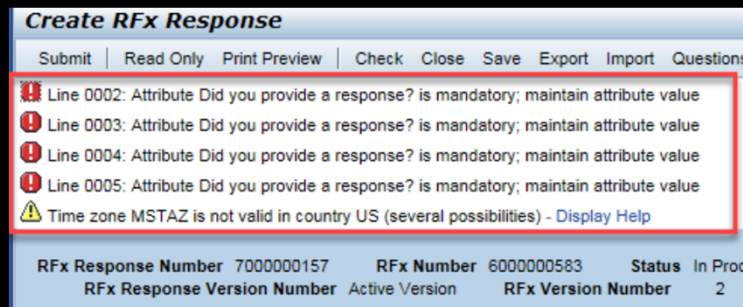
Error on page and **nothing** will be submitted

When I submit, what does the **yellow** triangle mean?

Typically a time zone error, information will still be **submitted**

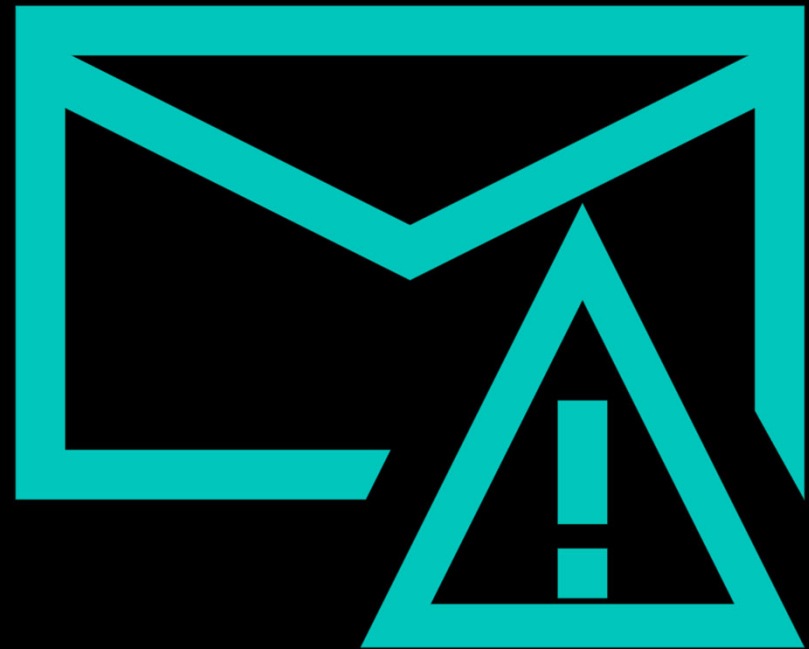
When I submit, what does the **green** square mean?

Verify information is correct and click **submit**



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.



How to scroll (Screenshot w/arrows)

Reminders

Place the following items on the Information Sheet:

- ❖ Project Title
- ❖ Project Number (*RFx Number 6000001540*)
- ❖ Firm Name
- ❖ Firm Address
- ❖ Firm Phone Number
- ❖ Vendor Number
- ❖ Name, Title, and Email Address of Contact Person

○ **Do NOT include any other information**

Questions after today?

Email all questions to:
kandi.kawolsky@phoenix.gov
Or call: 602-256-4108

Reference **Rfx 6000001540** in
your email subject line



Thank You for Attending!!!