



RFQu 25-0530
Interim Executives

March 6, 2025– 9:00 a.m.
Via WebEx

City of Phoenix
Finance Department



Welcome!

- Please turn off or silence cell phones during this pre-offer conference.
- Please mute your microphones, unless you are speaking, to mitigate background noise and potential electronic feedback for the other participants.
- We will be touching on each major section of the solicitation, please try and limit your questions to the section being discussed.
- Please add your questions to the chat during this pre-offer conference.



Legal Notice

The purpose of the Pre-Offer Conference is to provide a casual atmosphere to discuss the City's intent and to determine whether the City's requirements are clearly stated.

Although an exchange of information may take place, the official position of the City is that which is delivered in the solicitation document and in the form of a written Solicitation Addendum. Therefore, nothing said here today should be construed as a change to the written requirements in the solicitation document.

Any changes will be in the form of a solicitation addendum. Vendors must acknowledge receipt of any/all addenda by signing and returning the document with their submittal, or the response may be considered non-responsive.

Please note that it is the responsibility of the Offeror to read the entire solicitation document. Offerors must contact the Procurement Officer if they have any questions – no other City employees per the Transparency Policy.



Key Dates

Pre-Offer Conference

March 6, 2025
at 9:00 a.m.

Written Inquiries Due

March 6, 2025
at 5:00 p.m.

Offer Due Date

March 19, 2025
at 2:00 p.m.



UPDATES

1. Addendum 1 was posted changing the Procurement Officer, effective immediately to:

Margie.Vasquez@phoenix.gov

2. Attachments A, B, C, and D are now posted on the Solicitations site, they were inadvertently omitted from the original solicitation document.



Agenda

RFQu 25-0530 Interim Executive

1. Solicitation Instructions Overview
2. Scope of Work Overview
3. Terms and Conditions Overview
4. Insurance and Indemnification Requirements
5. Review Submittal Requirements
6. Closing



Qualification Criteria

RFP Section 2.16 Qualification Criteria (Pages 8-9)

Offerors must meet the following criteria in order to be considered for further evaluation of your offer:

- Offeror must have been in business at least 5 consecutive years providing related services as listed in the solicitation, within the last 7 years.
- Have a minimum of 5 years' experience providing all of the services as listed in the solicitation for private and public entities. Experience with government agencies comparable in size to the City of Phoenix is preferred.



Solicitation Instructions

RFP Section 2.20 Solicitation Transparency Policy (Page 9)

Transparency Policy in Effect

- All Communication through Procurement Officer
 - Posting of Solicitation through Council Approval
 - All offerors must register at: <https://www.phoenix.gov/procure>
- City's Vendor Self-Registration and Notification (RFP Section 2.2 – Pg 5)**
- Businesses ***must*** be registered with the Arizona Corporation Commission (this is checked)
 - All offers shall be firm and fixed for a period of 180 calendar days from the Offer Due Date.
 - The City will not be responsible for oral instructions made by employees or officers, any changes will be in the form of a solicitation addenda.
 - Exceptions (RFP Section 2.6 Pg 6)
 - Offerors must read the entire solicitation and accept all terms and conditions. It is the City's preference to not receive exceptions.



Solicitation Instructions

- Solicitation Inquiries ([email procurement officer only](#))
- Preparation of Offer (see RFP Section 9 Submittals Pg 43)
 - All Forms in Submittal Section Must be Submitted.
 - No Modifications to the Submittal Forms
- Submission of Offer (see RFP Section 2.12 – Page 7)
 - Electronic Submittal to procurement@phoenix.gov
 - Late Offers (see RFP Section 2.23 – Page 12)
- Award of Contract
 - Award(s) will be made to the most responsive, responsible Offeror(s) who are regularly established in this service. The City reserves the right to multiple award.



Scope of Work

OBJECTIVES

The Contractor will provide various Professional Executive Director Level Consulting Services Contractor(s) (“Interim Executives”) for the City of Phoenix on an as needed basis. This generally occurs when an interim executive is needed while a recruitment process occurs to fill the role on an ongoing basis.

The Contractor will initiate a search for a given new Services request upon receipt from the City of a signed Retainer Letter. The City will review the recommendations and issue a Schedule of Engagement to request Interim Executive services from the Contractor. The Contractor will complete the contracted scope of work under the general direction of the City Manager and/or designated City staff.



Scope of Work

RETAINER LETTER AND SCHEDULE OF ENGAGEMENT

Service requests will be issued by the City in one of two formats:

1. City provided Interim Executive Services
2. Contractor provided Interim Executive Services

Services will be reimbursed by the City in accordance with the format requested by the City.

Each new assignment of Interim Executive Services will require a Retainer Letter and a Schedule of Engagement.



Scope of Work

City sourced Candidate

There may be service requests where the City has identified a potential Interim Executive. In these circumstances, the Contractor would be required to process the candidate and administer the payroll function.

The City will provide the resume and candidate information to the Contractor.

Retainer Letter

The Retainer Letter is drafted by the Contractor and signed by the City after a City executive representative requests Interim Executive Services from the Contractor. The Retainer Letter serves as the official request by the City to begin the Interim Executives process for the City.

This letter must include the following:

- A. Date of City's request
- B. Name of City Executive Representative
- C. Applicable fees included in Section 4 – Pricing Proposal

Schedule of Engagement

The Schedule of Engagement is prepared and signed by the City and Contractor when the City desires to proceed with Interim Executive services.



Scope of Work

Contractor sourced Candidate

Retainer Letter

The Retainer Letter is drafted by the Contractor and signed by the City after a City executive representative requests the initial search from the Contractor. The Retainer Letter serves as the official request by the City to begin a search and provide recommendations of Interim Executives to the City.

This letter must include the following:

- A. Date of City's request
- B. Name of City Executive Representative
- C. Number of confidential resumes that will be provided by Contractor
- D. Date the City will receive the resumes
- E. Applicable fees included in Section 4 – Pricing Proposal

Schedule of Engagement

The Schedule of Engagement is prepared and signed by the City and Contractor when the City desires to proceed with Interim Executive services.



Scope of Work

CITY CLASSIFICATIONS AND PAY RANGES

Information on City job classifications and pay ranges can be found at the following website:

<https://www.phoenix.gov/hr/job-descriptions>



Pricing Proposal

RFP Section 4. Pricing Proposal (page 17)

The pricing proposal form provided by the City shall be used to submit your pricing NO EXCEPTIONS. Both tables must be completed entirely, failure to do so may deem your offer as non-responsive.

- (A) The Contractor shall submit the all-inclusive billable rate as an hourly rate for each Executive Title listed below. The prices shall be all-inclusive and include all pertinent additional fees normally associated with this type of service. No additional charges shall be allowed.
- (B) The Contractor shall provide itemization of the costs included in the hourly rate. To include but not limited to: mark-up, administrative fees, benefits, personnel rates, etc.



Pricing Proposal

Candidates sourced by the City of Phoenix

INTERIM EXECUTIVE		HOURLY RATE
1	City Manager /Asst. City Manager	\$ _____
2	Deputy City Manager	\$ _____
3	Department Head/Assistant Department Head	\$ _____
4	Police Chief	\$ _____
5	Deputy Department Heads/Middle Managers	\$ _____
	TOTAL (Sum of rows 1-5)	\$ _____

Candidates sourced by the Contractor:

INTERIM EXECUTIVE		HOURLY RATE
1	City Manager /Asst. City Manager	\$ _____
2	Deputy City Manager	\$ _____
3	Department Head/Assistant Department Head	\$ _____
4	Police Chief	\$ _____
5	Deputy Department Heads/Middle Managers	\$ _____
	TOTAL (Sum of rows 1-5)	\$ _____



Special Terms & Conditions

- Term of Contract (RFP Section 6.1 – Page 31)
 - Effective July 1, 2025 for a 5 year contract.

- Pricing shall be firm and fixed for the entire term of the contract.

- Background Screening (RFP Section 6.21 – Page 34)
 - Standard Risk Level Background Screening is the requirement of this solicitation and resulting contract.



Insurance & Indemnification

- RFP Section 7. Defense and Indemnification (Page 39)
 - RFP Section 8. Insurance requirements (Page 40), the required coverages include:
 - General liability
 - Automobile liability
 - Worker's compensation
 - Professional liability
- *Please refer to this section for the coverage limits.*
- Upon award, certificates of insurance (ACORD form or equivalent) must be provided to the City within 10-days
 - A copy of your Certificate of Insurance is not required to be submitted with your offer.



Evaluation Criteria

Evaluation Criteria (1000 Points Maximum)

- Qualifications, Experience & References (325 Points)
- Method of Approach (375 Points)
- Pricing (300 Points)

Submittal Instructions (Pg. 43)

- Offers must follow the submission requirements identified.
- Page limit is 40 pages total

Consensus Scores

1. Initial Evaluation: The overall consensus scores will determine the Offeror's ranking, and which Offers are within the competitive range.
2. Demonstrations (if applicable) RFP 2.29, Pg 13: Offerors in the competitive range may be invited to construct a presentation of their offerings, based on a script developed by the panel.
3. Best & Final Offers (if applicable) RFP 2.30, Pg 14: Offerors in the competitive range may be afforded the opportunity to amend its offer.
4. Award Recommendation: The evaluation panel will recommend the Offer that is the best value and most advantageous to the City based on the evaluation criteria.



Submittals

Email the proposal to procurement@phoenix.gov

Do not email your Offer to the Procurement Officer

Submittal Instructions (Pg. 43)

- Offers must follow the submission requirements identified.

Reminders

- Offer must be signed by a binding official
- Signed Addenda must be returned with your offer
- Completed Submittal forms must be returned with your offer
- Page limit is 40 pages total



Submittals

- Complete and include the required submittal forms:
 - Costs and Payments
 - Conflict of Interest and Transparency
 - Offer Signature page
 - Years in Business and References
- Please do not submit links or password protected documents
- Late Offers will be rejected



Questions & Answers (Q & A)

- Submit questions by March 6, 2025 (today)
 - 5:00 p.m., local Phoenix time
 - Email to: Margie.Vasquez@phoenix.gov
- Answers will be published via an addendum at the City's solicitation website.
 - [Solicitation Details - Solicitations City of Phoenix](#)



Key Dates

**IMPORTANT
INFORMATION**

Written Inquiries Due

**March 6, 2025
at 5:00 p.m.**

Offer Due Date

**March 19, 2025
at 2:00 p.m.**



Questions

