



Date: August 14, 2023
To: All Interested Parties
From: Brian Tobin, Fire Chief
Re: Addendum #1 to DMFD Solicitation RFQ #23-001

The Daisy Mountain Fire District is making clarifications to some of the wording currently located in the DMFD Solicitation #F23-001, that was initially posted on Tuesday August 1, 2023.

As revision: **INSTRUCTIONS FOR SUBMITTAL OF STATEMENT OF QUALIFICATIONS**

Please note the revision for page one last paragraph:

The Fire District will select one firm for the project. The Owner reserves the right to cancel this request for Statement of Qualifications at anytime. The Fire District will require the selected firm to be able to proceed with Construction Management at Risk Services within fourteen (14) calendar days after the award of work. ~~and that a principal of the firm be selected and assigned to the Project.~~ **The staff to be proposed on the project is to be identified in the CMAR submittal.**

As clarification: **Page 3, 3.0.6:** The District will accept up to 20 pages of content regardless of single (20 sheets x 1 side) or double sided (10 sheets x 2 sides) . It is your choice if you would like to submit as single sided or doubled sided. But any page with content will be counted toward the overall page count not to exceed 20 pages.

As revision: **Section 3.0.6:** The last sentence “One original and ~~six~~ **seven (7)** copies of the Statement of Qualifications must be submitted.”

As clarification: **Section 4 :** The cover letter counts towards the total pages, however other items do not count i.e., table of contents, copy of GC’s licenses, resumes, financial information, safety information, etc. but they must only include the specific content requested.

As clarification: **Section 5, Item H - References:** “Submit five (5) Owner and five (5) architect references of prior clients....” And Page 13 – Attachment 2 Performance Evaluation and Survey. A total of 5 references in combination from architects or clients for related projects in the last five years should be provided. List the reference checks on the form (attachment 2) from page 13 and include in the submittal for confirmation of submitted past performance evaluations. Respondents should submit the past performance forms to the refences and submit them to the Fire Chief per the instructions on page 13

**REQUEST FOR QUALIFICATIONS
CONSTRUCTION MANAGEMENT AT RISK
FOR
Daisy Mountain Fire District
RFQ # 23-001**

Notice is hereby given that the Daisy Mountain Fire District is inviting information from qualified Firms for Construction Management at Risk services for the project listed below. Provide sealed Statement of Qualifications addressed to Mr. Brian Tobin, Fire Chief, Daisy Mountain Fire District, 41018 N Daisy Mountain Dr, Anthem AZ 85086, and marked "STATEMENT OF QUALIFICATIONS FOR CONSTRUCTION MANAGER AT RISK FOR THE PROJECT DEFINED AS NOTED IN TABLE "A".

SUBMITTAL DUE: August 22, 2023 TIME: 11:00 a.m., Arizona

Time RFQ OPENING LOCATION:

Mail Proposal to:
Daisy Mountain Fire District
Attn: Brian Tobin
41018 N. Daisy Mountain Dr
Anthem, AZ 85086

Deliver Proposal to:
Daisy Mountain Fire District
Attn: Brian Tobin
41018 N. Daisy Mountain Dr
Anthem, AZ 85086

Pre-Submittal Conference: August 15, 2023 at 3:00 PM
Daisy Mountain Fire District
41018 N. Daisy Mountain Dr
Anthem, AZ 85086

INSTRUCTIONS FOR SUBMITTAL OF STATEMENT OF QUALIFICATIONS

The Fire District is requesting Statements of Qualifications from qualified construction firms registered in the State of Arizona for Construction Management at Risk Services for;

TABLE A:

- (1) New Fire Station #144
- Location: 2402 E Cloud Rd, Desert Hills AZ 85331
 - Estimated to be open for Fire Department Year 2024-25
 - Construction cost estimated at \$ 5,000,000
 - Approximately 10,000 sq. ft.

The Fire District will select one firm for the project. The Owner reserves the right to cancel this request for Statement of Qualifications at anytime. The Fire District will require the selected firm to be able to proceed with Construction Management at Risk Services within fourteen (14) calendar days after the award of work, and that a principal of the firm be selected and assigned to the Project.

SUBMITTALS

One (1) original and seven (7) copies must be submitted. Sealed Statements of Qualifications must identify the RFQ number in the lower left hand corner. No verbal, e-mailed or Statements of Qualifications will be accepted. Statements of Qualifications received after the specified time will not be opened or considered. The Fire District reserves the right to reject any or all Statements of Qualifications and to waive any informalities. Selection will be determined by the Fire District, and in the best interest of the Daisy Mountain Fire District.

PROJECT LOCATION: Are listed in Instructions for Submittal of Statement of Qualifications Table "A."

RFQ NUMBER: 23-001

1.0 PROJECT DESCRIPTION

- A. The Governing Board of Daisy Mountain Fire District wishes to enter into a contract with a qualified firm to perform Construction Management at Risk Services as outlined in this document for the project located in Table "A." The Construction Manager at Risk (CMAR) is responsible for the successful, timely, and economical completion of the design phase services and the construction services of the project.
- B. The Contract(s) shall be subject to the limitations and restrictions of Arizona Statutes.

2.0 SCOPE OF SERVICES

The Construction Management at Risk project is known as the Daisy Mountain Fire District Fire Station #144 Project located at project listed in Table "A" as will be indicated in the Contract Documents.

A. Design Phase Services - The Construction Manager at Risk will provide the following services:

Provide recommendations on value engineering opportunities including a cost estimate for each recommendation.

- 1. Provide milestone estimates for use in determining the best value and to insure project remain in budget.
- 2. The CMAR will have full budgetary responsibility in establishing the Guaranteed Maximum Price of the project.
- 3. Constructability reviews
- 4. Project design review meeting and services as needed to establish a complete project delivery
- 5. Other services identified in the Contract and inferable there from.

B. Management of Construction Services

The successful firm will be responsible for the construction management of the project described in this RFQ.

The services required for the construction program may include, but not be limited to the following:

- 1. Enter an "At-Risk" contract with all subcontractors, material suppliers and equipment suppliers necessary for the construction of said project.
- 2. Schedule and conduct design phase services meetings.
- 3. Provide continuous on-site construction management at risk services throughout the construction phase.

The management shall include, but is not limited to:

- a. Regular job site meetings and minutes.
- b. Maintain daily on-site project log and schedule report.
- c. Oversee quality assurance testing and inspection programs.

- d. Monitor construction management staff and subcontractor work performance for deficiencies.
 - e. Oversee construction management staff and subcontractor safety programs.
 - f. Maintain master set of construction documents on-site to include all ASI's and supplemental sketches and provide copies to all subcontractors concerned.
4. Develop, update and maintain master project schedules, detailed construction schedules, submittal schedules, inspection schedules and occupancy schedules.
 5. Process payment request for approval.
 6. Report potential budget and schedule variances and prepare recovery plans.
 7. Coordinate surveyors, special consultants, and testing lab services contracted by Owner as required.
 8. Administer post construction closeout and warranty collection, start-up and transition to operation.
 9. Provide construction program accounting and reporting to the Fire District as required.
 10. The CMAR will be required to collaborate with the Architect of record, the Fire Department's Program Manager and Design Team on the Project, submit pay requests for approval, issue RFI's when necessary and assist the Owner and Architect as required for the timely completion of the Project.
 11. The CMAR will be required to work with and coordinate their activities with any third party contracts or contractors that the Fire Department provides for this Project.
 12. The Fire District may elect to include additional services for the quoted fee to assist the Fire District in implementing and managing its capital improvement program.

3.0 REQUIREMENTS OF CONSTRUCTION MANAGER AT RISK (CMAR)

Firms must meet the following requirements:

1. CMAR must be experienced in providing construction management at risk services for District Administration office and Fire Station programs.
2. CMAR must be authorized to do business in the State of Arizona and must possess professional service registrations and construction licenses in accordance with applicable statutes, regulations and rules.
3. CMAR must be able to demonstrate financial strength appropriate to the scale of the project being managed. This includes adequate bonding capacity and insurance limits.
4. CMAR must be knowledgeable of the requirements of Arizona Statutes.
5. Statements of Qualifications must be submitted to the Fire District on or before the time and date and at the place indicated in the RFQ. Statements of Qualifications which have not been received by the Fire District on or before the scheduled receipt time as set forth in the RFQ will not be considered.
6. Statements of Qualifications should be bound and should be limited to not more than 20 (8.5 inch X 11 inch) pages printed on both sides, excluding covers and dividers, and excluding financial information. Oversize pages will be counted as two pages. Submissions in excess of twenty pages will be disqualified; however, clarity, conciseness and brevity of this document will be an evaluation criteria. One original and six copies of the Statement of Qualifications must be submitted.
7. The selected Construction Manager at Risk and its sub-contractors will be required to meet the insurance requirements of the Fire District. See attached certificate of Liability. General Liability \$2mil/\$4mil. Project name/number must be in the description box along with coverage on a primary and non-contributory basis. Waiver of subrogation to apply to all coverage. 30 days notice of cancellation, 10 day notice in case of non-

payment of all coverage. Coverage must remain in place for 10 years after the completion of the project. Additional insured endorsement must be scheduled and cannot be blanketed as follows: As per written contract DMFD, its employees, board, volunteers are named as additional insured with respect to General, Auto Liability and umbrella liability. Carriers of coverage must be "a" rated. Successful bidder will be required to submit proof of and maintain workers compensation and employer's liability insurance as required by the law.

8. A negotiation meeting will be conducted with the finalist on the date and at the place to be specified at a later date. If agreement is not reached on this date, Daisy Mountain Fire District will terminate negotiations and proceed to the next ranked firm or terminate the solicitation. At the Fire District's sole option, the negotiation cut off date may be extended.
9. Costs of participating in the selection process, including presentations to the Selection Committee or Daisy Mountain Fire District Board, are solely those of the CMAR; Daisy Mountain Fire District will assume no responsibility for any costs.
10. Daisy Mountain Fire District reserves the right to waive informalities and to terminate the selection process.
11. CMAR must provide full services from an operational office located on the job site using in-house staff in leadership positions.

4.0 STATEMENT OF QUALIFICATIONS

Required Information and Format

Statement of Qualifications must provide the required information in the following order and format:

- A. Letter of Introduction and interest signed by an officer or partner of the responding firm. This shall include the firm's history, organizational chart, local office primary contact, and form of ownership. Letter shall include specific reason(s) why the firm would be the best choice for the specified project.
- B. Table of Contents
- C. Compliance Information

This is a compliance section and carries no evaluation points. Firms must meet minimum criteria as specified to be considered responsive. It is totally at the Fire District's discretion to judge a submittal of qualifications responsive. Submittals shall include the following:

1. The CMAR must be properly certified by the Arizona Secretary of State to do business in Arizona.
 - A. Provide a copy of certification and state whether the Company is a corporation, joint venture, or partnership.
2. The CMAR must be properly registered, licensed and certified at the time of submission.
 - A. Provide a copy of the current Arizona General Contractor's license and current report from the Arizona Registrar of Contractors.
3. The CMAR must have been in continuous business for a minimum of five (5) years.
4. Financial Stability: CMAR must demonstrate the availability of resources and working capital required to complete the project. It is desired that the firm have a Working Capital Ratio greater than 1:0 positive profitability for the current or immediate fiscal year and a Return on Assets Ratio greater than 1%.

5. For the CMAR and/or its equity participants, indicate Working Capital Ratio, Profitability, and Return on Assets Ratio. Note: Copies of audited financial statements are not required with submittal. Prior to the final selection, the Daisy Mountain Fire District Board reserves the right to require the CMAR to provide a copy of audited financial statements for the previous two fiscal years.
6. The financial capability shall also include the bonding capacity of the firm. (The firm will be required to bond on the guaranteed maximum price for the Project). The firm shall be capable of providing all bonding and insurance requirements as required by the Fire District. The Surety Company must (a) be permitted to do business in the State of Arizona, (b) have a record of successful operation for five (5) years, and (c) have an A.M. rating of A+ or A. Provide a letter from your Surety.
7. Safety: The CMAR must have an Experience Modification Rating of 1.0 or less.
 - A. Provide a three (3) year EMR and safety history summary with safety plan and training information.
8. The CMAR must certify on the attached form in this RFQ prescribed by the Fire District that the submission of the bid or offer did not involve collusion or other anti-competitive practices, as set forth in A.A.C. R7-2-1084(B).

5.0 INITIAL SCREENING CRITERIA

The Selection Committee will objectively evaluate the firms' abilities in accordance with the criteria listed below:

A. Related Building Experience (30 points)

Major consideration will be given to the successful completion of previous projects comparable in design, scope, and complexity. List the projects, which best illustrate the experience of the firm and current staff which is being assigned to this project. (List no more than ten projects; list no projects, which were completed more than ten years ago). Include the following for each project:

1. Name and location of the project.
2. Nature of firm's responsibility on the project.
3. Project Owner's name, address, telephone and fax numbers.
4. Date project was completed or is anticipated to be completed.
5. Size of the project (construction gross sf)
6. Initial budget.
7. Cost of project (construction cost) including Change Orders – list Change Orders separately.
8. Work for which firm was responsible.
9. Demonstrated utilization of local independent contractors
10. Present status of project. (photos encouraged).
11. The firm's Project Manager and other key professionals involved in the project and whom of that staff would be assigned to the Project covered by this RFQ.

B. Scheduling and Cost Control (15 points)

1. The firm's scheduling system and cost control system shall be described. Methods for assuring subcontractor's adherence to schedule shall be highlighted. A comparison of the firm's project profile shall indicate their ability to hold to original schedules and budgets. The following questions shall be addressed:
 - a. Do you use or provide computer-generated schedules for the management of construction?

- b. To what level of detail should a construction schedule be defined? How do you schedule the processing of shop drawings and other submittals?
- c. How do you coordinate development of schedule information from subcontractors?
- d. State experience in handling crew loading and coordinated construction schedules.
- e. State experience in cost loading of schedules.
- f. Attach a sample schedule which best illustrates your overall scheduling capabilities.
- g. List the last five (5) construction management at risk or similar projects you have completed, provide original and final contract dollars and schedule.

C. Office Staff (10 points)

1. This criterion express the general and specific project related capability of the in-house staff and indicates the adequate depth and abilities of the organization which it can draw upon as needed. This will include management, technical and support staff. Also, indicate local support staff to be assigned to this project.
2. Give brief resumes of key persons to be assigned to the Project including, but not, limited to, the following:
 - a. Name and title.
 - b. Job assignment for other projects.
 - c. Percentage of time to be assigned full-time to this Project.
 - d. How many years with this firm.
 - e. How many years with other firms.
 - f. Experience including types of projects, size of projects (dollar value and square footage of project), and specific project involvement.
 - g. Education
 - h. Active registrations (if any).
 - i. Other experience and qualifications relevant to this Project.
 - j. Note any project experience that was fast-tracked.
3. Describe the capabilities of your staff to provide the technical services required for the following:
 - a. Options analysis
 - b. Design review
 - c. Budget estimating
 - d. Value engineering
 - e. Life cycle cost analysis
 - f. Construction scheduling
 - g. Quality control (design and construction)
 - h. Constructability analysis
 - i. Cost control
 - j. Change order negotiation
 - k. Claims management
 - l. Project closeout
 - m. Transition planning
 - n. Security systems

D. On-Site Staff (15 points)

The ability and experience of the field staff will be evaluated with specific attention to project related experience.

1. Give a brief resume of the on-site staff to be assigned to the Project including, but not limited to, the following:
 - a. Name and title
 - b. Job assignment for other projects.
 - c. Percentage of time assigned to this Project.
 - d. How many years with this firm.
 - e. How many years with other firms.
 - f. Experience including types of projects, size of projects (dollar value and square footage of project), and specific project.
 - g. Education.
 - h. Commitment to working with local district independent contractors
 - i. Active registrations (if any).
 - j. Other experience and qualifications relevant to this Project.
 - k. Note any project experience that was fast-tracked.

E. Management Plan (15 points)

1. Develop an organization chart as it relates to the Project, indicating key and appropriate number of personnel to be provided. It shall be understood that it is the intent of the Daisy Mountain Fire District to insist that those key personnel indicated as the project team in the RFQ response actually executes the Project.
2. If a joint venture, or prime/subcontractor arrangement of two (or more) firms, indicate how the work shall be distributed between the associated firms. Describe in a management plan how the organizational structure will ensure orderly communications, distribution of information, effective coordination of activities, and accountability.
3. The DMFD is a rural fire district with considerable community and business support. Explain your approach to prioritizing the use of local district independent contractors in the various phases of the construction process.
4. Discuss your sub-contractor selection process and show proof of having proper sub-contractors for the project
5. Explain your approach to scheduling methods, management services, quality assurances, inspection, cost control, and safety programs
6. Describe how your responses to items 1 through 4 will be applied to this project. Include your management plan approach for this project.

F. Information System (5 points)

1. Describe the functions and capability of your computer based project management and information system and provide examples of progress reports.

G. Workload (10 points)

1. List all outstanding contracts with other entities for the CMAR and sub consultants. Include contract dollar amount, contracting entity name and address, status of completion, and project completion date.

H. References (40 points)

Recommendations of previous owners and architects. Daisy Mountain Fire District will contact references listed in the submittal. Submit five (5) Owner and five (5) architect references of prior clients (including Daisy Mountain Fire District) for construction management at risk or similar services within the past five (5) years. List the contact's name, position, entity name, telephone number and fax number. Results will be provided to the Selection Committee.

I. Litigation (40 points)

The CMAR must have an acceptable history of working proactively to avoid litigation with Owners in providing construction management at risk services. Describe all litigation (including the court and location) of any kind involving CMAR firm, its officers or directors within the last 5 years.

6.0 DISCUSSIONS (Interview Process)

After the firms have been evaluated based on their written submissions, three (3) firms with the highest scores will be invited to participate in discussions as allowed by A.R.S. § 41-2578(C)(2)(b). This discussion shall be a total of 45 minutes with a 15- minute oral presentation by the firm, 15 minutes of questions and 15 minutes of discussion of the project management and scheduling plans for this project. The firms selected will be expected to address the following:

A. Management Plan (10 Points):

1. The firm shall demonstrate its knowledge of the site, local codes and ordinances, local subcontractors, and suppliers as an indication of its ability to deliver quality workmanship in an effective and timely manner.
2. The firm shall demonstrate verbally and graphically its plan for performing the Project, documenting the services to be provided and showing the interrelationship of all parties.

B. Office and Site Staff (20 Points)

1. The firm shall name the actual staff to be assigned to this Project, describe their ability and experience and indicate the function of each within their organization and their proposed role on this Project. The staff shall be present at the time of the interview. Resumes and background information of the assigned staff member shall be provided at this time.

C. Cost Control (15 Points)

1. As part of its services, the firm shall indicate knowledge and experience in the evaluation of building systems, construction techniques, and the recommendation of materials to create an optimum value in meeting the design and budget requirements.

D. Project Scheduling (20 Points)

1. As part of the project approach, the firm shall propose a scheduling methodology for effectively managing and executing the work in the optimum time. The firm shall indicate its procedure for scheduling and for

compliance controls. The firm shall describe any representative current projects and the projected versus the actual schedule for each.

7.0 SELECTION PROCESS:

During the course of the selection process, all prospective companies are cautioned not to contact Board members, Fire Chief and or any Daisy Mountain District personnel or Selection Committee members or attempt to persuade or promote through other channels.

- A. The Selection Committee will consist of no more than five (5) members with a maximum of one each of the following representation as follows:
 1. Architect/Engineer lawfully registered in Arizona (required)
 2. The DMFD Fire Chief or his/her designee
 3. Senior Manager from a Licensed Contractor (required)
 4. One Board Member/Community member
 5. One Fire District labor representative as recommended by the Fire Chief
- B. The Selection Committee will review all Statements of Qualifications (SOQ) received on time that are responsive to the solicitation requirements to determine a shortlist of three (3) to five (5) submitters for the interview phase of the selection process. Teams on the shortlist may be invited to participate in detailed interviews, however, **the District reserves the right to select a firm based on the evaluation of the SOQ submittals alone and not proceed to interviews.**
 1. Until the award and execution of the CMAR Preconstruction contract for the Project, the District will only release the name of each firm/team invited to the interview session. All other information received by the District in response to the SOQ or contained in the proposals will be confidential to avoid disclosure of the contents that may be prejudicial to the competing offerors during the Selection Process. The submittal of the winning team will be open to public inspection after the contract is awarded and the District has executed the contract with the selected offeror.
- C. The Selection Committee will conduct discussions with the firms with the highest scores and will establish ratings for each firm in accordance with the scoring criteria established for the Project. Following discussions, firms will be evaluated based on their response to criteria set forth in the RFQ.
- D. Each member of the Selection Committee shall score each firm. The results will then be discussed among the Committee. The Selection Committee shall then average their scores for each firm. Contractors that are considered responsive shall have the scores from the SOQ added to the scores of their Discussion to determine the ranking of the firms.
- E. The Selection Committee shall engage or authorize one or more persons to engage the highest ranked proposer in negotiations as set forth in A.R.S. § 41-2578(E). Should the Fire District Board or its designee(s) be unable to negotiate a satisfactory contract with the highest ranked proposer, at a price the Selection Committee determines to be fair, competitive and reasonable, the Selection Committee shall proceed as set forth in A.R.S. § 41-2578(E).

8.0 GENERAL INSTRUCTIONS

- A. Submit statement of Qualifications in a sealed envelope in accordance with instructions contained in the Request for Qualifications (RFQ). Submittals are to be clearly marked with the RFQ number and the firm's name and address on the outside of the sealed envelope.
- B. Define requirements of written proposals and maximum number of pages. Type size and photo/graphic use
- C. Furnish the number of copies as instructed in the RFQ.
- D. The response shall contain a manual signature of an authorized representative of the responding firm; facsimile

copies or electronic signatures will not be accepted.

- E. Responses received after the receipt time noted in the RFQ will be returned unopened to the proposer.
- F. The Fire District is not liable for any costs incurred by the proposers prior to the issuance of an executed contract. Firms responding to the RFQ shall be available for presentations and discussions to the Fire Department's Selection Committee.
- G. The contents of the Statement of Qualifications of the successful firm may become part of the contractual obligations.
- H. Statement of Qualifications shall be typed. All corrections made by the proposer prior to the opening shall be initialed and dated by the proposer. No changes or corrections will be allowed after the Statements of Qualifications have been opened.
- I. Any questions concerning the RFQ should be directed in writing to Mr. Brian Tobin, Fire Chief, Daisy Mountain Fire District, 41018 N Daisy Mountain Drive, New River, Az 85086.
Tel: 623.465.7400 Fax: 623.465.7632
- J. All requests for information shall be submitted no later than seven (7) days prior to the RFQ. Only the interpretation or correction so given by the Fire District or the project Manager in writing, shall be binding and prospective firms are advised that no other source is authorized to give information concerning, or to explain or interpret the RFQ and the selection process. All such interpretations and supplemental instructions will be in the form of written Addenda to the RFQ.
- K. Selection Committee members are not to be contacted prior to the Fire Districts Board's decision to approve or reject the Selection Committee's recommendation. At the Fire District's discretion failure to comply with this requirement will be grounds for disqualification.
- L. Specifically, this NO-CONTACT PERIOD will commence on the initial date of the advertisement for the Request for Qualifications and continue through and include the date the Daisy Mountain Fire District Governing Board makes its determination to approve or reject the Selection Committee's recommendation.
- M. Failure to meet any of these requirements may disqualify your firm from consideration.

9.0 TERMS AND CONDITIONS

- A. The Fire District reserves the right to accept or reject any or all Statements of Qualifications in the best interest of the Fire District. The Daisy Mountain Fire District Governing Board reserves the right to waive any informality in the selection process.
- B. If contracts arise from this solicitation, a separate contract shall be issued for design phase services and another for construction services.
- C. The Fire District reserves the right to award the contract to the next most qualified firm if the successful firm does not begin the contracted services within fourteen (14) calendar days of acceptance by the Daisy Mountain Fire District Governing Board, or if an acceptable fee cannot be negotiated.
- D. Statements of Qualifications that do not comply with these instructions or that do not include the requested data may not be considered.
- E. The successful firm shall not discriminate against any person in accordance with Federal, State or local law.
- F. It is the sole responsibility of the submitting firm to ensure Statements of Qualifications are received at the proper place on or before the time and date required, and in the format stated.
- G. EQUAL EMPLOYMENT OPPORTUNITY: Daisy Mountain Fire District does not discriminate in admission or access to or treatment or employment in its programs and activities on the basis of race, color, religion, age,

sex, national origin, marital status, handicap or any other reason prohibited by law.

- H. PROPOSERS are advised that and all protests must be made in accordance with the requirements of the TERMS and CONDITIONS of this Request for Statements of Qualifications, and Arizona State Statutes.
- I. This is merely a solicitation for qualifications and shall not be construed as an offer to contract or as intent to enter into a contract. There shall be no enforceable contract or intent to contract until such time as it may be expressly stated by the Fire District, all prior conditions including, but not limited to, bonding and insurance requirements and a written contract is fully executed by the parties.

SELECTION SCHEDULE

Evaluation and Interview Dates are tentative and could change without prior notice

| | |
|--|---|
| Advertisement for RFQ | August 1 st and 8 th , 2023. |
| Release of RFQ | August 1 st , 2023 |
| Pre-Submittal Meeting 3 PM | August 15, 2023 |
| Receipt of RFQ's – 11:00 A.M. | August 22, 2023 |
| Evaluation of Statements of Qualifications | August 23, 2023 |
| Notification of Finalists | August 25, 2023 |
| Interviews | September 5, 2023 |
| Negotiations | September 12 th thru September 15 th , 2023 |
| Award of Contract by Governing Board | September 25, 2023 |

Attachment 1: Non-collusion Affidavit Form

State of _____

County of _____

Name

Title

Company Name

As an authorized representative of the persons, corporation, or company who makes the accompanying Proposal ("Offeror") with respect to the Daisy Mountain Fire District's solicitation, and having first been duly sworn, I hereby depose and state as follows:

The accompanying proposal is genuine, and such proposal is neither a sham nor collusive, nor is such Proposal made in the interest or on behalf of any person or corporation not named herein.

The Offeror has not directly or indirectly induced or solicited any other offeror to put in a sham or collusive bid, or induced or solicited any other offeror to refrain from submitting a proposal.

The Offeror has not in any manner sought by collusion or anti-competitive means or practices to secure for itself advantage over any other offeror.

Signed: _____

Title: _____

Subscribed and sworn to before me this _____ day of

_____, 20_____

Notary Public: _____

My Commission Expires: _____

THIS PAGE MUST BE SIGNED, NOTARIZED AND RETURNED WITH YOUR RESPONSE.

Attachment 2: Performance Evaluation and Survey

DETAILED INSTRUCTIONS ON HOW TO PREPARE A REFERENCE LIST AND HOW TO PREPARE AND SEND PERFORMANCE EVALUATION SURVEYS

The objective of this process is to identify the past performance of a firm and key personnel assigned to perform the specified services. This is accomplished by sending survey forms to past and/or present clients. The clients will return the forms directly to the Daisy Mountain Fire District, and the ratings will be averaged together to obtain a firm's past performance rating. The figure below illustrates the survey process. The survey form is included with this solicitation in the excel workbook. All surveys are due on or before August 22, 2023, at 11:00 am Arizona time.

SAMPLE REFERENCE LIST – Place your list in the proposal

Below is the format you will follow for submitting your reference list. We have included an example of the information that should be included. You will enter past and/or present clients that you have provided similar services for that you have sent the Performance Survey form to. Fillable form can be found in the Excel Workbook included with the proposal and is preferred for use in proposal. Include Reference List with offer.

Vendor or Individual

Send Surveys to clients

Call to
Confir
m

Prepare & Email
Reference List

Daisy Mountain Fire District

Emails back to the Daisy Mountain Fire District

The Daisy Mountain Fire District Compiles Information

Past or Present Customers

| Number | Name of Public Agency | Type of Project | Contract Sales Amount | Year of the Project | Contact Name | Phone Number |
|--------|-----------------------|-----------------|-----------------------|---------------------|--------------|--------------|
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |

Attachment 2: Performance Evaluation and Survey

The top portion is to be completed by the vendor. Bottom portion is to be completed by past clients. TO

THE ATTENTION OF :

NAME OF CLIENT'S :

COMPANY:

PHONE:

COMPANY BEING SURVEYED:

SUBJECT: REQUEST FOR PROPOSAL NO. 23-001 CM@Risk Services

To Whom It May Concern:

Daisy Mountain Fire District has implemented a process that collects past information on vendors. The information will be used to assist the Daisy Mountain Fire District in the evaluation to determine responsive and responsible procurement of the above firm.

The company listed above has chosen to participate in this solicitation. They have listed you as a past or present client that they have provided services for. Both the company and Daisy Mountain Fire District would greatly appreciate you taking a few minutes out of your busy day to complete the accompanying questionnaire.

Please evaluate the Performance of the vendor (10 means-you are Always satisfied and have no question about hiring them again, 5 means- you are Sometimes satisfied, and 1 means- you are very Dissatisfied and would never hire them again because of very poor performance). If you do not have sufficient knowledge of past performance in a particular area, leave it blank.

| NO | Criteria | Unit | SCORE |
|----|---|--------|-------|
| 1 | Ability to Manage Program | (1-10) | |
| 2 | Quality of Program | (1-10) | |
| 3 | Quality of Customer Service | (1-10) | |
| 4 | Quick Response Time | (1-10) | |
| 5 | Ability to Maintain Confidentiality | (1-10) | |
| 6 | Close Out Process (invoicing, no unexpected | (1-10) | |
| 7 | Communication | (1-10) | |
| 8 | Overall Customer Satisfaction Based on Performance (comfort level in using vendor | (1-10) | |

TOTAL POINTS

Thank you for your time and effort in assisting the vendor in this important endeavor. Please email or fax this questionnaire to Daisy Mountain Fire District, brian.tobin@dmfd.org (email is preferred method) or Fax (623) 465.7632 by 11:00 am. on or before August 22, 2023.

Signature _____ Date _____

Printed Name (Company being Surveyed) _____ Title _____

Attachment 3: Vendor Registration Form

New Vendor Registration

Update / Change Existing

Main Information

Vendor / Individual Name:

(As it will appear on your invoice/check)

Legal Name:

(As it appears on your IRS records, if different from above)

Address & Contact Information

Main / Physical Location:

| | | | |
|-----------------------|--|-------|-----|
| Street or PO | | | |
| Box | | State | Zip |
| City | | Fax # | |
| Phone | | Title | |
| # | | | |
| Contact Name | | | |
| Contact Email Address | | | |

Remit To Location: (if different from above)

| | | | |
|-----------------------|--|-------|-----|
| Street or PO | | | |
| Box | | State | Zip |
| City | | Fax # | |
| Phone | | Title | |
| # | | | |
| Contact Name | | | |
| Contact Email Address | | | |

Ordering / Purchasing Location: (if different from above)

| | | | |
|------------------------------|--|-------|-----|
| Street or PO | | | |
| Box | | State | Zip |
| City | | Fax # | |
| Phone | | Title | |
| # | | | |
| Contact Name | | | |
| Contact Email Address | | | |
| Purchase Order Email Address | | | |

Company Website URL:

Can you order online using the Purchase Order number as the payment option to place the order?
 YES NO

If YES please email brian.tobin@dmfd.org with our updated vendor account information so that we can update our records as well as make sure that we have an online account set up with your company to complete the process of ordering online.

Attachment 4: Confidential/Proprietary Submittals Form

CONFIDENTIAL/PROPRIETARY SUBMITTALS (MARK ONE):

_____ No confidential/proprietary materials have been included with this offer.

_____ Confidential/Proprietary materials included. Offerors should identify below any portion of their offer deemed confidential or proprietary. Identification in this section does not guarantee that disclosure will be prevented but that the item will be subject to review by the Offeror and the Daisy Mountain Fire District prior to any public disclosure. Requests to deem the entire offer or price as confidential will not be considered.

Company Name

Authorized Signature

Attachment 5: Addenda Acknowledgement Form

This page is used to acknowledge any and all addendums that might be issued. Any addendum issued within three days of the solicitation due date, will included a new due date to allow for addressing the addendum issues. Your signature indicates that you took the information provided in the addendums into consideration when providing your complete Offer response.

Please sign and date

ADDENDA NO. 1 Acknowledgement

Signature Date

ADDENDA NO. 2 Acknowledgement

Signature Date

ADDENDA NO. 3 Acknowledgement

Signature Date

If no addendums were issued, indicate below, sign the form and return with your response.

Company Name

Authorized Signature

Attachment 6: W-9 Request for Taxpayer ID Number and Certification

Form **W-9**
(Rev. December 2014)
Department of the Treasury
Internal Revenue Service

**Request for Taxpayer
Identification Number and Certification**

**Give Form to the
requester. Do not
send to the IRS.**

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Cl
o)

Attachment 7: Certificate of Liability Insurance

CERTIFICATE OF LIABILITY INSURANCE

SEALED QUALIFICATIONS SUBMITTAL

Submitted by:

DATE/TIME STAMP FOR RECEIVING

Company Name:

Address:

City, State, Zip:

RFQ# 23-001 CM@Risk Services

Due Date: Tuesday, August 22, 2023, at 11:00 a.m. AZ Time

MAIL TO:

Daisy Mountain Fire District Attn:

Brian Tobin

41018 N Daisy Mountain Drive, Anthem, Az 85086

DELIVER TO: (Monday through Thursday between 8 am and 4 pm)

Daisy Mountain Fire District

Attn: Brian Tobin

41018 N Daisy Mountain Drive, Anthem, Az 85086