



City of Phoenix
Office of the City Engineer
Design and Construction Procurement
Consultant Proposal Submittal – General Guidelines

THESE CONSULTANT PROPOSAL SUBMITTAL GENERAL GUIDELINES ARE NOT ALL INCLUSIVE BUT ARE STRICTLY A GUIDELINE

CONSULTANT PROJECT PROPOSAL SUBMITTAL PACKAGE

TYPICALLY CONSISTS OF:

1. COVER LETTER
2. SCOPE OF WORK
3. FEE SCHEDULE – STAFF TITLES / HOURLY RATES / PROJECT HOURS / ALLOWANCES / REIMBURSABLE
4. PROJECT SCHEDULE – BY MAJOR TASK AND DURATIONS
5. PROPOSAL SUBMITTAL – PRIME AND SUBCONSULTANT PROPOSAL AND PROPOSAL BACK-UP DOCUMENTATION

CONSULTANT PROJECT PROPOSAL

ALL DOCUMENTATION / CORRESPONDENCE SHOULD INCLUDE THE FOLLOWING:

- CONTRACT NUMBER
- PROJECT NUMBER
- PROJECT TITLE
- PROJECT DESCRIPTION / ADDRESS OR LOCATION
 - SUBCONSULTANT (TO PRIME FIRM) PROPOSAL / DOCUMENTATION SHOULD BE ON LETTERHEAD AND INCLUDE PROJECT NUMBER, PROJECT TITLE AND PROJECT ADDRESS

1. COVER LETTER:

- COVER LETTER, ON CONSULTANT LETTERHEAD WITH CONTACT INFORMATION
 - A BRIEF CONFIRMATION OF THE PROJECT WITH THE TOTAL NOT TO EXCEED FEE AND NUMBER OF CALENDAR DAYS TO COMPLETE THE PROJECT (PROJECT COMPLETION DATE / DURATION CLEARLY IDENTIFIED)
 - ADDRESS TO ASSIGNED VERTICAL PROJECT MANAGER (VPM) IF LISTED OR CITY PROJECT MANAGER (PM)
 - SEND PROPOSAL TO PROJECT MANAGERS (PM AND VPM) AND COPY CONTRACTS SPECIALIST (CS) FOR REVIEW

2. SCOPE OF WORK:

- SCOPE OF WORK IS AN EXHIBIT TO THE PROPOSAL SEPARATE FROM COVER LETTER, FEES AND PROJECT SCHEDULE
- DESCRIBE THE SERVICE TASKS NECESSARY TO COMPLETE THE PROJECT
- LIST TASKS/SUB-TASKS DETAILING THE SERVICES TO BE PROVIDED UNDER EACH TASK (BRIEF, CONCISE, CLEAR UNDERSTANDING)

EXAMPLE:

TASK 1: KICK-OFF MEETING – CONDUCT WITH STAKEHOLDERS, ETC.

TASK 2: RESEARCH – REVIEW OF PROJECT SITE AND SITE FEATURES, ETC.

TASK 3: SURVEY – SURVEY AND DEVELOP TOPOGRAPHY MAP OF SITE, INCLUDING DRAINAGE INLETS WITH 30%, 90% AND FINAL SUBMITTALS, ETC.

TASK 4: REPORT – PROVIDE A REPORT WITH FINDINGS OF RESEARCH AND SURVEY, ETC.

- PROVIDE A LIST OF DELIVERABLES – SUCH AS; REPORT; STUDY AND SURVEY; FINAL DESIGN, ETC.

3. FEE SCHEDULE:

- FEE SCHEDULE IS A SECONDARY EXHIBIT TO THE PROPOSAL
- HOURLY RATES:
 - ANNUAL SERVICES CONTRACTS SHOULD USE CONTRACTED BILLABLE RATES (BY JOB TITLE AND HOURLY RATE)
 - CONSULTANT BILLABLE RATES (NEW CONTRACT):
 - NEGOTIATIONS FOR BILLABLE RATES TO BE SUBMITTED BY JOB TITLE, DIRECT HOURLY RATE, OVERHEAD PERCENT AND PROFIT PERCENT
 - SUBCONSULTANT(S) BILLABLE RATES:
 - NEGOTIATIONS FOR BILLABLE RATE TO BE SUBMITTED BY JOB TITLE, DIRECT HOURLY RATE, OVERHEAD PERCENT AND PROFIT PERCENT
 - ALL OTHER RATES SHOULD BE BROKEN DOWN BY JOB TITLE AND HOURLY RATE
 - ONLY LIST PERSONNEL / SUBS PERFORMING THE WORK

EXAMPLE SUBMITTAL OF HOURLY RATES TO BE NEGOTIATED:

| | |
|-------------------------------------------------|---------------|
| <u>PROJECT MANAGER (NO ROUNDING OF DOLLARS)</u> | |
| DIRECT HOURLY RATE | \$4.00 |
| OVERHEAD (120%) | \$4.80 |
| <u>PROFIT (10%)</u> | <u>\$.88</u> |
| TOTAL HOURLY RATE | \$9.68 |

- FEE SCHEDULE WITH TASKS AND COSTS SHOULD BE BROKEN DOWN BY CLASSIFICATION / CATEGORY FOR BOTH CONSULTANT AND SUBCONSULTANTS FOR LEVEL OF WORK EFFORT (LABOR RATES BY JOB CLASSIFICATION AND LOADED RATE)
- PROVIDE A SUMMARY AS WELL AS A DETAILED TABLE OF COSTS
- INCLUDE SUBCONSULTANT(S) WORK AND REIMBURSABLE AS LINE ITEM ALLOWANCES (NO ROUNDING OF DOLLARS)

| | | |
|-----------------|-------------------------------------|----------------|
| <u>EXAMPLE:</u> | PRIME ON-CALL CONSULTANT | \$25.50 |
| | ELECTRICAL ENGINEERING (FIRM NAME) | \$12.50 |
| | LANDSCAPE ARCHITECTURE (FIRM NAME) | \$10.50 |
| | SURVEY SUBCONSULTANT (FIRM NAME) | \$10.00 |
| | <u>REIMBURSABLE (IDENTIFY TYPE)</u> | <u>\$ 1.00</u> |
| | TOTAL NOT TO EXCEED FEE | \$59.50 |

- ANY TIME FOR SUB COORDINATION AND SUPERVISION SHOULD BE INCLUDED AS PART OF PROJECT MANAGEMENT
- ALLOWANCES, FEES, OPTIONAL WORK, ETC. ARE TO BE SHOWN AS SEPARATE LINE ITEMS IN THE PROPOSAL
- MARK-UPS ON SUBCONSULTANT(S) SERVICES ARE NOT ALLOWED
- REIMBURSABLE ITEMS ARE PAID AT ACTUAL COST (REPROGRAPHIC SERVICES, POSTAGE, COURIER, ETC.).
- EXPENSE ITEMS SUCH AS MILEAGE IS NOT ALLOWED
- A COPY OF EACH SUB'S PROPOSAL BY TASKS WITH NARRATIVE DESCRIPTION OF SERVICES, WORK EFFORT HOURS, LOADED HOURLY RATES (SUBMIT DIRECT HOURLY RATE / OVERHEAD / PROFIT ON BACKUP DOCUMENTATION) ON THEIR LETTERHEAD TO YOUR FIRM SHOULD BE INCLUDED AS PART OF THE PROPOSAL (ON-CALL CONSULTANT SUBMITS TO CONTRACTS SPECIALIST AND PROJECT MANAGER IDENTIFIED)
- CONSULTANT AND SUBCONSULTANT PROPOSALS CANNOT SPECIFY PROVISIONS THAT CONFLICT WITH THE CONTRACT PROVISIONS
- SUBCONSULTANT TERMS AND CONDITIONS TO PRIME **SHOULD NOT** BE SUBMITTED WITH PROPOSAL TO CITY
- SEE FEE SCHEDULE EXAMPLE BELOW

4. PROJECT SCHEDULE:

- PROPOSAL SHOULD INCLUDE A PROJECT TIMELINE FROM DATE OF NOTICE TO PROCEED TO PROJECT COMPLETION SHOWING DATES (CAN BE COMPLETED THROUGH MICROSOFT PROJECT MANAGER OR BY PROVIDING THE NUMBER OF DAYS / WEEKS TO COMPLETION)

- IF A PROJECT SCHEDULE IS NOT SUBMITTED, THE DURATION OF THE PROJECT SHOULD BE IDENTIFIED IN CALENDAR DAYS TO COMPLETION
- COMPLETION DATE OR DURATION (IN CALENDAR DAYS) TO COMPLETION WILL BE INCLUDED IN THE NOTICE TO PROCEED
- ANY PROJECT EXCEEDING THE SCHEDULED COMPLETION WILL REQUIRE A TASK ORDER ADJUSTMENT TO BE ISSUED
- A TASK ORDER ADJUSTMENT REQUIRES DOCUMENTATION OF THE REVISION REQUIRED

5. PROPOSAL SUBMITTAL:

- SUBMIT PROPOSAL IN PDF FORMAT TO CONTRACTS SPECIALIST AND COPY PM(/VPM) FOR REVIEW
- PROPOSAL SUBMITTAL IS APPROVED WHEN BOTH CONTRACTS SPECIALIST AND PM(/VPM) ACKNOWLEDGE ACCEPTANCE
 - CONSULTANT REVISES THE PROPOSAL UNTIL IT IS ACCEPTABLE TO THE CLIENT DEPARTMENT PM(/VPM) AND CS

THE FOLLOWING IS AN EXAMPLE FEE SCHEDULE. IT IS NOT INTENDED TO BE A FORMAT STANDARD BUT THE INFORMATION INCLUDED IN THE TABLE IS REQUIRED TO PROCESS YOUR PROPOSAL. FEE PROPOSAL FORMAT IS FOR PRIME FIRM AND SUBCONSULTANT(S).

FEE SCHEDULE EXAMPLE:

| FIRM: ABC CONSULTANTS PROJECT: STORM DRAINAGE IMPROVEMENTS | | | | DATE: JANUARY 1, 2021 CONTRACT NO.: 123456 PROJECT NO.: ST11122233 | | | | | |
|---------------------------------------------------------------|---------------------|------------------------------|-----------------------------------|--------------------------------------------------------------------------|------------------------|---------------------------|-----------------|----------------|-----------------|
| PROJECT HOURS | | | | | | | | | |
| TASK | PRINCIPAL \$6.00 | PROJECT MANAGER \$5.28 | PROJECT ENGINEE R \$4.80 | ENGINEER / DESIGNER \$4.00 | CADD TECH \$3.00 | 2-MAN SURVEY \$3.25 | ADMIN \$2.50 | TOTAL HOURS | TOTAL FEE |
| (1) DATA COLLECTION | 0 | 1 | 4 | 4 | 0 | 0 | 0 | 9 | \$40.48 |
| (2) FIELD SURVEY | 0 | 1 | 1 | 0 | 0 | 8 | 0 | 10 | \$36.08 |
| (3) DESIGN | 0 | 1 | 3 | 4 | 6 | 0 | 0 | 14 | \$53.68 |
| (4) MEETINGS | 2 | 6 | 4 | 0 | 0 | 2 | 6 | 20 | \$84.38 |
| (5) FINAL REPORT | 0 | 4 | 2 | 2 | 1 | 1 | 6 | 16 | \$59.97 |
| TOTAL HOURS | 2 | 13 | 14 | 10 | 7 | 11 | 12 | 69 | |
| TOTAL FEES | \$12.00 | \$68.64 | \$67.20 | \$40.00 | \$21.00 | \$35.75 | \$30.00 | | \$274.59 |

ALLOWANCE: SAMPLE TESTING - \$10.00

REIMBURSABLE: PRINTING, PRESENTATION BOARDS - \$2.00