

Responding to Bids 101

Guidance for Pursuing Business Opportunities with the City of Tulsa
Invitation for Bid (IFB) Edition

Updated November 2021



Creating a Great Customer Experience

Making our procurement process as accessible and friendly as possible is a priority for the City of Tulsa. We want your bidding experience to be clear, efficient, and welcoming, no matter what product or service your firm provides.



We especially welcome businesses that are new to contracting with the City – we're so glad you're here!



Responding to Bids 101 will cover...

- **WHAT:** an overview of the Invitation for Bid (IFB) form's structure, content, and purpose. This does **not** focus on RFPs and CSPs.
- **HOW:** checklists and guidelines for submitting bid packets to the City Clerk's office correctly.
- **HOW:** the 4 most common errors firms make in responding to bids – and how to avoid them.

GOAL: To learn how to respond to IFBs accurately and effectively, such that you pursue business opportunities at the City best suited to your needs and strengths.



Housekeeping

- Have a question? Put it in the chat! We'll save **the last 10~ minutes to address your questions and comments**. I'll also address questions in the chat over breaks during the “quiz” sections of the training.
- Stay muted unless speaking.
- This session will be recorded for future reference posted on Tulsa's [“Selling to the City” website](#).



What is an IFB?

City of Tulsa Finance Department

Invitation for Bid (IFB)

IFB 22-400
Supplies or Service Requested: Forklift

NIGP Commodity Code(s):
 560-75

Solicitation Schedule

EVENT	DATE
IFB Issue Date	9/24/2021
Pre-Bid Conference or Webinar <small>Location Zoom/Teams link</small>	9/28/2021 at 9:00 AM CT
Deadline for Questions <small>Submitted to assigned buyer via email.</small>	10/03/2021 <small>10 Days prior to IFB due date</small>
Bid Submission Date <small>Either mailed or delivered to City Clerk address. Bids are open the day after the due date.</small>	10/13/2021

If You have any questions or need additional information, contact the Assigned Buyer:

Darin Johnson | darinjohnson@cityoftulsa.org
All questions should be emailed with IFB 22-400 on the subject line.

- **Formal solicitation:** An IFB is the document the City uses to promote a business opportunity, establish the City's goals and needs for a product or service, and describe the parameters for bid submission. It is how the City purchases a product or service when it is over a certain price.
- **Legal document:** If the specifications are met, IFBs are primarily evaluated on **price**. When a vendor submits a bid, they are agreeing to the City's terms and conditions.
- **Opportunity for innovation:** Upon reading the IFB, you can reach out to your buyer with questions and comments regarding the specifications and what product or service best suits the City's needs.



**But what does the IFB actually look like?
What's the purpose of each section?**



Cover Page

City of Tulsa

Finance Department

Invitation for Bid (IFB)

IFB 22-400

Supplies or Service Requested: Forklift

NIGP Commodity Code(s):
560-75

Right away you know:

- What the City wants
- NIGP commodity codes (which are key to vendor registration!)

The rest of the page tells you:

- Key dates: pre-bid conference, question deadline, bid submission
- Assigned buyer

Solicitation Schedule

EVENT	DATE
IFB Issue Date	9/24/2021
Pre-Bid Conference or Webinar <i>Location Zoom/Teams link</i>	9/28/2021 at 9:00 AM CT
Deadline for Questions <i>Submitted to assigned buyer via email.</i>	10/03/2021 <i>10 Days prior to IFB due date</i>
Bid Submission Date <i>Either mailed or delivered to City Clerk address. Bids are open the day after the due date.</i>	10/13/2021

If You have any questions or need additional information, contact the Assigned Buyer:

Darin Johnson | darinjohnson@cityoftulsa.org
All questions should be emailed with IFB **22-400** on the subject line.



Section I: Statement of Purpose

I. STATEMENT OF PURPOSE:

1. Overview and Goals

The City of Tulsa is seeking to purchase Type “K” soft annealed copper tubing to reinforce safe stormwater drainage in East Tulsa for its Streets and Stormwater Department.

2. Term of Contract

The City intends to award a one-year annual contract. The City may offer the Seller the opportunity for additional one-year terms. The City also reserves the right to make multiple or partial awards. To do business with the City, You must agree to the terms and conditions of the City’s standard Purchase Agreement, indicated by Your Authorized Agent’s signature on the Purchase Agreement.

The entire Invitation for Bid (IFB) including any additional information submitted by Bidder and Accepted by City will be included as part of the Agreement between Seller and City. **All sheets of this IFB (including Sections I-V) must be submitted.**

Capitalized terms used in this IFB and not defined in the Agreement shall have the meanings as ascribed to them in Title 6, Chapter 4 of the Tulsa Revised Ordinances found at https://library.municode.com/ok/tulsa/codes/code_of_ordinances?nodeId=CD_ORD_TIT6FIDE_CH4PU

Authorized Agent

Several parts of the Bid (Affidavits, Purchase Agreement) must be signed by an “**Authorized Agent**.” An Authorized Agent means an agent who is legally authorized to bind the Seller under the law of the State in which the Seller is legally organized. For instance, under Oklahoma law, the Authorized Agent for each of the following types of entities is as stated below.

This section tells you:

- What the City hopes to purchase and why the City needs the product or service.
- The **terms of the contract:**
 - One-year annual contract
 - Agreeing to the standard Purchase Agreement
 - Authorized Agent for signatures



Section II: Scope of Work and Specifications

This section tells you:

- What are the **must haves** for this product or service? What qualifications, specifications, and/or experiences **MUST** the vendor demonstrate?

Here are some sample specs for a utility vehicle (IFB 21-923).

2. Specifications

The Bid **must** meet or exceed the following Specifications.

Note that these specs are **mandatory**.

CATEGORY	SPECIFICATION(S)
Equipment	<ul style="list-style-type: none"> This specification is for new current year model Utility Vehicles. Polaris Ranger 570, John Deere XUV 590M or Acceptable Equivalent.
Engine	<ul style="list-style-type: none"> Cylinders: Two (2). Four (4) stroke engine. Electronic fuel injection. Displacement: 550 cc minimum. Fuel: Gasoline.
Electrical	<ul style="list-style-type: none"> System Voltage: 12 Volts. Battery: 325 Cold cranking amps. Alternator: 15 amps minimum. Brake and taillights. 50 W headlight.



Section III: Bid Submission Instructions

III. BID SUBMISSION INSTRUCTIONS AND INFORMATION

- Bidder Registration:** To ensure timely updates and alerts about business opportunities with the City of Tulsa, interested Bidders should register as a Bidder with the City. To register, interested Bidders should complete the City's online vendor registration form ([linked here](#)). If you have any questions, email Jina Djahedian (jdjahedian@cityoftulsa.org) or check the City's "Selling to the City" website ([linked here](#)).
- Pre-Bid Conference:** If a pre-Bid conference is required, see the first page for time, location, and teleconference link.

Attendance Requirement

 - Attendance at the Pre-Bid Conference (in-person or virtual) is required to submit a Bid.
 - Attendance is not required to submit a Bid.
- Questions and Concerns:** As You prepare Your bid response, You may have questions or points of clarification around this solicitation. Any questions or comments about this Invitation for Bid must be sent via e-mail to the Assigned Buyer (listed on the first page) and be received at least **10 Days prior to the Bid Submission Date**. Please include the IFB bid number (as indicated on the title page) on all communications. Bidders may only communicate with the City through the Assigned Buyer – communication with other City staff could result in disqualification.
- Issuing of Addenda:** The City of Tulsa may addend or amend its IFB at any time before the Bid Submission Date. In addition to registering as a Bidder with the City, Bidders can check the "Purchasing Bid Opportunities & Results" page on the City of Tulsa Website for the latest updates ([linked here](#)). Any such amendments shall become a part of the Agreement. You must acknowledge receipt of any Addenda or Amendments by signing and returning the

We will cover vendor registration and bid submission in more depth during the webinar!

This section tells you about:

- Registering as a vendor**
- Whether or not there's a pre-bid conference:** an opening meeting (virtual or in-person) with vendors that discusses needs and requirements for a given IFB response.
- Sending questions to the buyer:** all questions are due via email **10 calendar days prior to the bid submission date**.
- Issuing addenda:** subsequent changes to the IFB based on bidder inquiries or change in requirements.
- Submitting bids**
- Opening bids:** 8:30 a.m. CT Thursday, the day after Bids are due. Openings are held in the City of Tulsa Council Meeting Room, 175 East 2nd Street, 2nd Floor, Tulsa, OK.



Section IV: Bid Evaluation and Award

This section discusses:

- **How bids are evaluated:** Given it's an IFB, we're looking for the **lowest secure bidder** – the product or service that best meets the City's needs at the lowest cost.
- However, sometimes the lowest cost bid does not win. This can be due to:
 - Not meeting all the mandatory specifications.
 - Poor past performance on previous contracts.
 - Submitting an incomplete bid.

IV. BID EVALUATION AND AWARD

1. **Bid Evaluation:** The Assigned Buyer and departmental staff will work together to determine the winning bid. Generally speaking, the Bid award will go to the **Lowest Secure Bidder: the Supply or Service that can best meet the City's needs at the lowest cost.** In addition to price and specifications, the Buyer and departmental staff may also evaluate Bidder history and experience, delivery time, maintenance requirements, and performance data, among other factors.
2. **Bid Rejection or Withdrawal:** The City may reject any or all Bids in whole or in part. Reasons a Bid may be rejected are as set forth in [the City's Purchasing Ordinance](#) and include, but are not limited to the following:
 - A submitted Invitation for Bid does not contain all the necessary materials, signatures, and/or affidavits (listed on the included checklist);
 - The Bid does not meet specifications and requirements in some material way;
 - The Bidder holds outstanding debt to the City;
 - The Bidder adds additional terms and conditions that modify IFB requirements or attempt to limit Bidder's liability to the City.

City reserves the right to waive any formalities or minor irregularities, defects, or errors in Bids. Bid withdrawal, meanwhile, may only be accomplished by having an Authorized Agent request the withdrawal in person at the City Clerk's office before the City's close of business on the Bid Submission Date.

- **How bids are awarded:** Bid award recommendations are announced at the Standard, Specifications, and Award (SSA) committee meeting. If approved by SSA, the award recommendation is ultimately sent to the Mayor for the Mayor's final approval.



Section V: Bid Processing and Payment

This section covers a lot! Some important highlights include:

V. BID PROCESSING AND PAYMENT

1. **Forms, Notice to Proceed, and Irrevocability of Offer:** If the City Accepts Your Bid, You will have ten (10) Days from notification of the Acceptance to provide a completed IRS form W-9. You cannot start work until authorized to do so by the Purchasing Agent or a representative. Often a purchase order receipt will serve as notice to proceed.

Bidder understands and acknowledges that the offer submitted as the Bid is firm and irrevocable from the City's close of business on the Bid Submission Date until 365 Days after the Bid Opening Date.

2. **Purchase Order Without Contract:** If the successful Bid is less than One Hundred Thousand Dollars (\$100,000), the City, in its sole discretion, may Accept the Bid upon written approval of the Mayor rather than execute the Purchase Agreement. Instead, the City will purchase the Supplies and/or Services by issuing a purchase order. In any event, the terms of this Invitation for Bid will govern the transaction and be enforceable by the City and Bidder.]

3. **Payments:** Invoices should be e-mailed to City of Tulsa – Accounts Payable at:

apinvoices@cityoftulsa.org

Payment will be made net 30 Days after receipt of a properly submitted invoice or the City's Acceptance of the Supplies or Services, whichever is later.

4. **Insurance:**

Seller and its subcontractors must obtain at Seller's expense and keep in effect so long as City is purchasing Supplies or Services from Seller pursuant to this Bid, policies of insurance in the minimum amounts set forth below and Workers' Compensation and Employer's Liability insurance in the statutory limits required by law.

- **Payments:** If awarded the bid, submit all invoices to Accounts Payable at apinvoices@cityoftulsa.org.
- **Insurance:** Make sure to include your certificate of insurance in your bid packet if it's required!
- **References:** Sometimes the City will ask for references – make sure to include those if necessary!



Quiz Time!

Which of these statements is TRUE?

- A. A bidder has 20 calendar days prior to bid submission to send the assigned buyer questions.**
- B. IFBs generally award to the “lowest secure bidder” – the lowest cost product or service that best meets the City’s needs.**
- C. IFBs result in 2-year contracts.**
- D. If you’re awarded the bid, you should submit invoices to your assigned buyer.**



**So how do I respond to an IFB
correctly? How and what do I need to
submit?**



What should ALWAYS be in my bid packet?

Use the included bidder checklist as your guide. EVERY bid requires:

- The IFB itself
- Exhibit A: Delivery and Pricing
- Exhibit B: Bidder Information Sheet
- Specifications
- Affidavit (**notarized and signed!**)
- Purchase agreement (signed!)
- Acknowledgement of Receipt of Addenda (signed!)

BIDDER CHECKLIST

Use this checklist to ensure You have properly read and completed **all** documents listed below. This document (the IFB) contains all the following materials, which must be completed and returned to the City of Tulsa City Clerk's Office in a mailed envelope with the affixed packing label (found on the last page). Each of these documents will form the resulting Agreement between the City of Tulsa and Seller.

Remember: Bids must be sealed and either mailed or delivered. Please use the provided label to clearly write the Bidder legal name and Bid number on the **outside** of the package, container, or envelope. The package, container, or envelope should contain **both** of Your completed Bids, the original and the copy. No faxed or emailed Bids will be considered. Bids received after the stated date and time **will not be accepted**.

Bidder's Name: _____

BIDDER CHECKLIST		
RESPONDENT DOCUMENTS	PAGES	INCLUDED?
Notice of Invitation for Bid (Sections I-V, all preceding pages)	1-7	
EXHIBIT A: Delivery and Pricing	8	
EXHIBIT B: Bidder Information Sheet	9	
Specifications	10	
References (if applicable)	7	
Certificate(s) of Insurance (if applicable)	n/a	
Affidavits <i>Signatures of Authorized Agent and notarization required</i>	11	

If ALL these forms are not filled out completely and included in the packet, you may be considered nonresponsive!



How should I submit my bid?

*You **MUST** mail or submit your hard copy bid to the following address:*



Office of the City Clerk – City of Tulsa
175 E. 2ND St., Suite 260
Tulsa, OK 74103

NO faxed or emailed bids will be considered! Bid packets must be received no later than **5:00pm CST on the bid submission date** listed on the first page of the IFB.

- Your bid packet should include **TWO** completed bids: one labeled “Original,” the other labeled “Copy.” An electronic copy may also be required in some instances.
- Please include **BOTH** bids (original and copy) in the same envelope or package.



How should I submit my bid?

Use the included bid packet label to ensure the address is correct and that you have the right information.

Make sure this is your firm's **legal name**.

FROM: Beth Bidder
Beth's Auto and Trucking
123 Cincinnati Avenue
Tulsa, OK 74104

Remember: **BOTH** bids (original and copy) should be in this package!

Remember to write the bid number and description on your label.

City of Tulsa - City Clerk's Office
175 East 2nd Street, Suite 260
Tulsa, OK, 7410

Bidder Submission For:
BID# IFB 30-400
BID DESCRIPTION: Heavy Duty Two-Post Lift System



Quiz Time!

Which of the following is FALSE?

- A. Your packing label should include the bid #.**
- B. Your bid packet should include TWO copies of your bid: one labeled “original” and the other “copy.”**
- C. You can fax or email your bid to the City Clerk’s office.**
- D. The Purchasing Agreement needs to be signed by an authorized agent.**

4 Most Common Errors Firms Make in Bid Submission



1. Having the Wrong Person Sign Key Documents

The affidavits, Purchasing Agreement, and addenda acknowledgement ALL require signature by an Authorized Agent.

What's an Authorized Agent? It depends on your kind of business and where you are legally organized.

An **Authorized Agent** means an agent who is legally authorized to bind the Seller under the law of the state in which the Seller is legally organized.

Here are some examples under Oklahoma law:

- **Corporations** – the president, vice president, board chair or board vice chair can sign.
- **General Partnerships** – any partner can sign to bind all partners.
- **Limited Partnerships** – the general partner must sign.

ACKNOWLEDGMENT OF RECEIPT OF ADDENDA/AMENDMENTS

I hereby acknowledge receipt of the following Addenda or Amendments and understand that such Addenda or Amendments are incorporated into the Invitation For Bid and will become a part of any contract entered into pursuant to the process by which this addendum is attached.

Number of all Addenda or Amendments: (Write "None" if applicable)

AFFIDAVIT
NON-COLLUSION, INTEREST, AND CLAIMANT

STATE OF _____
COUNTY OF _____

I, _____ of lawful age, being first duly sworn, state that:
(Seller's Authorized Agent)

- I am the Authorized Agent of Seller herein for the purpose of conveying facts pertaining to the existence of collusion between and among Bidders and municipal officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to the process by which this addendum is attached.
- I am fully aware of the facts and circumstances surrounding the making of Seller's Bid and
- Neither the Seller nor anyone subject to the Seller's direction or control has been a
 - to any collusion among Bidders in relation of tenders of contract or proposed as a fixed price or to return from responding;
 - to any collusion with any municipal official or employee as to the prospective contract; or as to any other terms of such prospective contract;
 - in any discussions between Bidders and any municipal official or employee or other thing of value for special consideration in the letting of a contract.
- No officer or employee of the City of Tulsa either directly or indirectly owns a fee and the Bidders business or such a percentage that constitutes a controlling interest, following officers and/or employees of the City of Tulsa own an interest in the Bidder's a controlling interest, either direct or indirect.
- All invoices to be submitted pursuant to this agreement with the City of Tulsa will be submitted to _____
- That the work, services or material furnished will be completed or supplied in accordance with the specifications, plans, requests or contract furnished or required by the Affiant. Affiant has made no payment directly or indirectly to any elected official, officer or employee public or private of the City of Tulsa as a beneficiary, of money or any other thing of value or procured the contract or purchase order pursuant to which any invoice is submitted. The Affiant has complied with all applicable laws regarding equal employment opportunity.

By: _____ Signature
Title: _____

Subscribed and sworn to before me this _____ day of _____, 20____.

Notary Public:
My Commission Expires: _____
Notary Commission Number: _____

The Affidavit must be signed by an Authorized Agent and notarized.

PURCHASE AGREEMENT
(Page 5 of 5)

IMPORTANT NOTE: This document must be signed by Authorized Agent FAILURE TO SUBMIT PROPERLY AUTHORIZED SIGNATURE MAY RESULT IN YOUR BID BEING REJECTED AS NONRESPONSIVE.

IN WITNESS WHEREOF, this Agreement has been executed in multiple copies on the dates set forth below to be effective during the period recited above.

Seller Company Name: _____
Sign Here ▶ _____

ATTEST: _____ Printed Name: _____
Title: _____
Date: _____

Corporate Secretary _____
Date: _____

CITY OF TULSA, OKLAHOMA,
a municipal corporation,

ATTEST: _____ By: _____ Mayor
Date: _____

City Clerk: _____
Date: _____

APPROVED: _____
Assistant City Attorney

And the affidavits **ALSO** require notarization!



2. Not Including Materials Necessary to Demonstrate Work Qualifications

Make sure to read the specifications and scope of work carefully (section II of the IFB) to ensure your bid includes the necessary supplementary materials for demonstrating your qualifications.

Examples:

In addition to the items required for the bid as listed on the checklist at the beginning of the bid package, use the checklist to ensure you have provided all required attachments based on the technical specifications. Bids from the Seller must include the following attachments, as required by the technical specifications:

- _____ Brochures and/or specification literature clearly describing the unit(s) and verifying that the unit(s) meet or exceed the requirements of this specification.

TAC 1212 Water Fittings: Vendors needed to make sure to provide literature that demonstrated you met specs.

TAC 077H Motor Oil, Lubricants, and Greases: Vendors needed to make sure to provide safety data sheets (SDS) with deliveries.

SAFETY DATA SHEETS (SDS)

The Seller is required to provide SDS for each item when the first delivery of each item is made. Failure of the Seller to properly label hazardous substances and chemicals and provide MSDS shall render the agreement null and void immediately.



3. Using the Wrong Unit of Measure in Your Quote

Make sure on your pricing sheet (Exhibit A) you are using the units requested in the IFB.

Take this example: TAC 1218A for water piping...

If the City requests 20' and 60' pipe rolls...

Water Pipe

Item #	Copper (See Specification "Wpipe")	Est. Yearly Qty	Unit Cost
1	Copper Pipe, (Type K, Soft 60-foot roll) 3/4"	25	
2	Copper Pipe, (Type K, Soft 60-foot roll) 1"	20	
3	Copper Pipe, (Type K, Soft 20-foot joint) 1-1/2"	15	
4	Copper Pipe, (Type K, Soft 20-foot joint) 2"	15	
Item #	PVC (See Specification "Wpipe")	Est. Yearly Qty	Unit Cost
5	PVC Pipe (C900-Class 200) 20'x1/2"	50	
6	PVC Pipe (C900-Class 200) 20'x3/4"	50	
7	PVC Pipe (C900-Class 200) 20'x1"	50	
8	PVC Pipe (C900-Class 200) 20'x1-1/4"	50	

Then make sure your bid pricing is by bid roll NOT by the foot!



4. Labeling Your Bid Packet Improperly

Remember: bid packet submission mistakes are some of the most common errors vendors make! Again, consider **three things**:

II. Make sure this is your firm's **legal name**.

FROM: Beth Bidder
Beth's Auto and Trucking
123 Cincinnati Avenue
Tulsa, OK 74104

I. **BOTH** bids (original and copy) should be in this package!

III. Remember to write the bid number and description on your label.

City of Tulsa - City Clerk's Office
175 East 2nd Street, Suite 260
Tulsa, OK, 7410

Bidder Submission For:
BID# IFB 30-400
BID DESCRIPTION: Heavy Duty Two-Post Lift System



Quiz Time!

Which of the following documents does NOT require a signature by an Authorized Agent?

- A. Purchasing Agreement**
- B. Affidavits**
- C. Acknowledgement of receipt of addenda**
- D. They all require an Authorized Agent signature!**

How can I hear about bid opportunities?

City of Tulsa Vendor Registration Form

Vendor Information

Instructions: Complete the section below to provide basic information about your business or firm. Complete the sections below to provide basic information about your business or firm in order to conduct business with the City of Tulsa. If you have any questions, you can reach Jina Djahedian at jdjahedian@cityoftulsa.org

Company Name*
As shown on tax returns and organizational documents

Doing Business As (if applicable)

Register online!

- Completely online submission – including W9 and EFT forms.
- You'll then receive email notifications about bid opportunities based on what **commodity codes** your firm selects.
- Having trouble with bid registration? Email Jina Djahedian at jdjahedian@cityoftulsa.org

<https://www.cityoftulsa.org/government/departments/finance/selling-to-the-city/register-as-a-vendor/>



Questions? Comments?

Feel free to email Donny Tiemann (dziemann@cityoftulsa.org) or purchasing@cityoftulsa.org.

Thanks!

