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?

• **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?
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

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

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_TIT6FIC4E_C44PU

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.
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?

### 2. Specifications

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

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>SPECIFICATION(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>- This specification is for new current year model Utility Vehicles. Polaris Ranger 570, John Deere XUV 590M or Acceptable Equivalent.</td>
</tr>
<tr>
<td>Engine</td>
<td>- Cylinders: Two (2).</td>
</tr>
<tr>
<td></td>
<td>- Four (4) stroke engine.</td>
</tr>
<tr>
<td></td>
<td>- Electronic fuel injection.</td>
</tr>
<tr>
<td></td>
<td>- Displacement: 550 cc minimum.</td>
</tr>
<tr>
<td></td>
<td>- Fuel: Gasoline.</td>
</tr>
<tr>
<td>Electrical</td>
<td>- System Voltage: 12 Volts.</td>
</tr>
<tr>
<td></td>
<td>- Battery: 325 Cold cranking amps.</td>
</tr>
<tr>
<td></td>
<td>- Alternator: 15 amps minimum.</td>
</tr>
<tr>
<td></td>
<td>- Brake and taillights.</td>
</tr>
<tr>
<td></td>
<td>- 50 W headlight.</td>
</tr>
</tbody>
</table>

Note that these specs are mandatory.
Section III: Bid Submission Instructions

III. BID SUBMISSION INSTRUCTIONS AND INFORMATION

1. 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 Djehedian (djehedian@cityoftulsa.org) or check the City’s “Selling to the City” website (linked here).

2. 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**

3. 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.

4. Issuing Addenda: The City of Tulsa may add to 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:

1. Registering as a vendor
2. 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.
3. Sending questions to the buyer: all questions are due via email **10 calendar days** prior to the bid submission date.
4. Issuing addenda: subsequent changes to the IFB based on bidder inquiries or change in requirements.
5. Submitting bids
6. 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.

• 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:

• **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!)

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

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

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

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

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.
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:

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…

<table>
<thead>
<tr>
<th>Item #</th>
<th>Copper (See Specification &quot;Wpipe&quot;)</th>
<th>Est. Yearly Qty</th>
<th>Unit Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Copper Pipe, (Type K, Soft 60-foot roll) 3/4&quot;</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Copper Pipe, (Type K, Soft 60-foot roll) 1&quot;</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Copper Pipe, (Type K, Soft 20-foot joint) 1-1/2&quot;</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Copper Pipe, (Type K, Soft 20-foot joint) 2&quot;</td>
<td>15</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item #</th>
<th>PVC (See Specification &quot;Wpipe&quot;)</th>
<th>Est. Yearly Qty</th>
<th>Unit Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>PVC Pipe (C900-Class 200) 20'x1-1/2&quot;</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>PVC Pipe (C900-Class 200) 20'x3/4&quot;</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>PVC Pipe (C900-Class 200) 20'x1&quot;</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>PVC Pipe (C900-Class 200) 20'x1-1/4&quot;</td>
<td>50</td>
<td></td>
</tr>
</tbody>
</table>

If the City requests 20’ and 60’ pipe rolls…

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**:

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

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

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

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

Questions? Comments?
Feel free to email Donny Tiemann (dtiemann@cityoftulsa.org) or purchasing@cityoftulsa.org.

Thanks!