



**Invitation For Bid TAC144F**  
**Collection Service-General Accounts Receivables**  
**Finance Department**  
**Issued: November 9, 2017**

**City of Tulsa,**  
**Oklahoma**  
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NOTICE is hereby given that the CITY OF TULSA, OKLAHOMA will receive sealed Bids for the following:

**BID # TAC144F**

**DESCRIPTION: Collection Service-General Accounts Receivables (Commodity Code(s):946-33)**

You are invited to submit a Bid to supply the Goods and/or Services specified above. Invitations for Bid (IFB) will be posted on the City's website at [www.cityoftulsapurchasing.org](http://www.cityoftulsapurchasing.org) or a hardcopy may be obtained at:

City of Tulsa-Purchasing Division  
175 East 2<sup>nd</sup> Street, Suite 865  
Tulsa Oklahoma 74103

**Bids must be received no later than 5:00 PM (CST) on Wednesday, December 13, 2017, and delivered to:**

**City Clerk's Office**  
**175 East 2<sup>nd</sup> Street, Suite 260**  
**Tulsa Oklahoma 74103**

Bids must be sealed and either mailed or delivered. No faxed or emailed Bids will be considered. Bids received after the stated date and time **will not be accepted and will be returned to the Bidder unopened.**

The Bid Packet consists of (1) this Notice of Invitation for Bid, (2) the Summary Sheet, (3) Form #1, (4) Form #2, (5) Form #3, (6) Form #4, (7) Form #5, (8) Form #6, (9) the Instructions, Terms and Conditions for Bidders, (10) Special Requirements, (11) Technical Specifications and (12) Exhibit A.

Use this checklist to ensure you have properly read and completed all Forms.

- Notice of Invitation for Bid
- Summary Sheet
- Form #1: Bidder Information Sheet. Must be completed.
- Form #2: Purchase Agreement. **Complete legal name in first paragraph and Notice provision in Section 17.i. Original signature required.**
- Form #3: Interest Affidavit. Original signature and notarization required.
- Form #4: Non-Collusion Affidavit. Original signature and notarization required.
- Form #5: Affidavit of Claimant. Original signature and notarization required.
- Form #6: Acknowledgment of Receipt of Addenda/Amendments. Must be completed and signed.
- Instructions, Terms and Conditions for Bidders
- Special Requirements (Offer Period; Insurance and Bonding; References)
- Technical Specifications
- Exhibit A: Bid Form including Delivery and Pricing. This is your Bid. It must be completed or your Bid will be rejected.

**IMPORTANT NOTE: Write the Bid Number, Bid Description (as listed above), and Bid Opening Date on the lower left corner of the outside of your Bid envelope. You must return the entire completed Bid Packet.**



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**SUMMARY SHEET**

**Project Buyer**

If you have any questions or need additional information, contact the assigned Project Buyer:  
Terry O. Thomas, Senior Buyer  
[tthomas@cityoftulsa.org](mailto:tthomas@cityoftulsa.org)  
Include **TAC144F** on the subject line

**Bidder's Notice of Intent to Submit a Bid**

Email the Project Buyer indicating your intent to Bid. Include **TAC144F** on the subject line of the email. You will receive an email response verifying your notice of intent to bid was received. This same procedure should be followed to request clarification, in writing, of any point in the IFB. Bidders are encouraged to contact the Project Buyer by email if there is anything in these specifications that prevents you from submitting a Bid, or completing the Bid Packet.

Questions and concerns must be received no later than **ten (10) days prior** to the Bid Packet due date.

**Issuing of Addenda**

If you received the notice of this IFB from the City as a result of being registered to sell the commodity code(s) on this Bid, you should also receive notice of any addenda issued. If you are not registered with the City to sell the commodities listed herein, you must register as a supplier on the City of Tulsa Purchasing website ([www.cityoftulsapurchasing.org](http://www.cityoftulsapurchasing.org)) to receive notice of any addenda, or to receive notice of any future IFBs.

**Pre-Bid Conference**

If a pre-Bid conference will be held for this IFB, information on that conference will be inserted below:

Date [Click here to enter a date.](#) Time  
Location:

\_\_\_ Attendance at the Pre-Bid Conference is required to submit a Bid; however Bidders may make arrangements to attend via teleconference in some cases (contact the Project Buyer for details).

\_\_\_ Attendance is not required to submit a Bid.

**Bid Packet Submission**

The City requires two completed Bid packets: 1 Original and 1 Copy. Each must be clearly labeled on the front sheet indicating "Original" or "Copy". If a copy on electronic media is also required, the line below will be checked.  
\_\_\_ Electronic Copy also required.

Responses to this Invitation for Bid must be made on the forms listed on page 1. The entire completed Bid Packet must be returned or your Bid may be rejected. Do not take exception to any portion of this Bid Packet. Do not make any entries except where required. Do not insert any other documents into the Bid Packet.

**Bid Opening**

All Bid openings are public and take place at 8:30 a.m. Thursday, the day after Bids are due. The Bid openings are held in the City of Tulsa Council Meeting Room, 175 East 2<sup>nd</sup> Street, 2<sup>nd</sup> Floor, Tulsa, Oklahoma.





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**FORM #2 (Page 1 of 4)  
PURCHASE AGREEMENT**

**INSTRUCTIONS:** This document **must** be properly signed and returned or your Bid will be **rejected**. This form constitutes your offer and if accepted by the City of Tulsa will constitute the Purchase Agreement under which you are obligated to perform. Your signature on this document indicates you have read and understand these terms and agree to be bound by them.

**THIS PURCHASE AGREEMENT** is between the CITY OF TULSA, OKLAHOMA, a municipal corporation, 175 East 2<sup>nd</sup> Street, Tulsa, Oklahoma, 74103-3827 (the "City") and:

(Bidder's company name as reflected on its organizational documents, filed with the state in which bidder is organized; not simply a DBA) (the "Seller").

**WITNESSETH:**

WHEREAS, the City has approved certain specifications and advertised for or solicited Bids on the following goods or services:

**TAC144F - Collection Service-General Accounts Receivables**

(the "Goods and/or Services"); and

WHEREAS, Seller desires to provide such Goods and/or Services to City, acknowledges that this document constitutes Seller's offer to provide the Goods and/or Services specified below, and further acknowledges that if executed by the City's Mayor, this document will become the Purchase Agreement for such Goods and/or Services.

NOW, THEREFORE, for and in consideration of the terms, covenants and conditions hereinafter set forth, the parties hereto agree as follows:

- Documents Comprising the Agreement.** The Bid Packet includes the Notice of Invitation to Bid, the Summary Sheet, Form #1, Form #2, Form #3, Form #4, Form #5, Form #6, the Instructions, Terms and Conditions for Bidders, the Special Requirements, the Technical Specifications, Exhibit A and any addenda or amendments to the Bid Packet. The Bid Packet is incorporated herein by this reference. In the event of conflicting or ambiguous language between this Purchase Agreement and any of the other Bid Packet documents, the parties shall be governed first according to this Purchase Agreement and second according to the remainder of the documents included in the Bid Packet. Seller may submit as part of its Bid additional materials or information to support the Bid. Additional materials or information submitted by Seller which are not ambiguous and which do not conflict with this Purchase Agreement or the other Bid Packet documents are incorporated herein by this reference.
- Purchase and Sale.** Seller agrees to sell City the Goods and/or Services for the price and upon the delivery terms set forth in Exhibit A hereto. City agrees to pay Seller the price as set forth in Exhibit A based on (a) the quantity actually purchased in the case of goods or services priced by unit, or (b) the total price for a stated quantity of goods or services, upon (i) delivery of the Goods and/or Services to the City, (ii) the City's Acceptance thereof, and (iii) Seller's submission and City's approval of a verified claim for the amount due. City shall not pay any late charges or fees.
- Irrevocable Offer.** Seller understands and acknowledges that its signature on this Agreement constitutes an irrevocable offer to provide the Goods and/or Services. There is no contract unless and until City's Mayor/Mayor Pro Tem executes this Agreement accepting Seller's Bid. No City officer, employee or agent except the Mayor (or Mayor Pro Tem) has the authority to award contracts or legally obligate the City to any contract. Seller shall not provide any Goods and/or Services to City pursuant to this Agreement before this Agreement is executed by City. If Seller provides any Goods and/or Services to City pursuant to this Agreement before this Agreement is executed by City, such Goods and/or Services are provided at Seller's risk and City shall have no obligation to pay for any such Goods and/or Services.
- Term.** The term of this Agreement shall be effective commencing on the date of execution of this Agreement by the Mayor/Mayor Pro Tem of the City of Tulsa and terminating one year from that date. City in its sole discretion may offer Seller an opportunity to renew this Agreement for an additional four (4) one (1) year term(s). Seller understands and acknowledges that any future contracts or renewals are neither automatic nor implied by this Agreement. The continuing purchase by City of the Goods and/or Services set forth in this Agreement is subject to City's needs and to City's annual appropriation of sufficient funds in City's fiscal year (July 1<sup>st</sup> to June 30<sup>th</sup>) in which such Goods and/or Services are purchased. In the event City does not appropriate or budget sufficient funds to perform this Agreement, this Agreement shall be null and void without further action by City.
- Warranties.** Seller shall assure that the Goods and/or Services purchased hereunder are covered by all available and applicable manufacturers' warranties for such Goods and/or Services. Seller expressly agrees that it will be responsible for performing all warranty obligations set forth in the Technical Specifications for the Goods and/or Services covered in this Agreement. Seller also warrants that the Goods and/or Services will conform to the Technical Specifications and Special Requirements, and further warrants that the Goods and/or Services shall be of good materials and workmanship and free from defects for either a minimum of one (1) year from the date of Acceptance or installation by City, whichever is later, or as **specified in the Technical Specifications**, whichever is later. In no event shall Seller be allowed to disclaim or otherwise limit the express warranties set forth herein.
- Warranty Remedies.** City shall notify Seller if any of the Goods and/or Services fails to meet the warranties set forth above, and Seller shall promptly correct, repair or replace such Goods and/or Services at Seller's sole expense. Notwithstanding the foregoing, if such Goods and/or Services shall be determined by City to be defective or non-conforming within the first thirty (30) days after the date of Acceptance by City, then City at its option shall be entitled to a complete refund of the purchase price and, in the case of Goods, shall promptly return such Goods to Seller. Seller shall pay all expenses related to the return of such Goods to Seller.



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7. **Seller Bears Risk.** The risk of loss or damage shall be borne by Seller at all times until the Acceptance of the Goods or Services by City.
8. **No Indemnification by City.** Seller understands and acknowledges that City is a municipal corporation that is funded by its taxpayers to operate for the benefit of its citizens. Accordingly, and pursuant to Oklahoma law, City shall not indemnify nor hold Seller harmless for loss, damage, expense or liability arising from or related to this Agreement, including any attorneys' fees and costs. In addition, Seller shall not limit its liability to City for actual loss or direct damages for any claim based on a material breach of this Agreement and the documents incorporated herein. City reserves the right to pursue all legal and equitable remedies to which it may be entitled.
9. **Indemnification by Seller.** Seller agrees to indemnify, defend, and save harmless City and its officers, employees and agents from all suits and actions of any nature brought against them due to the use of patented appliances, products or processes provided by Seller hereunder. Seller shall pay all royalties and charges incident to such patents.
10. **No Insurance by City.** If City is leasing Goods herein, City shall not be required to obtain insurance for Seller's property. Seller shall be solely responsible for any insurance it deems necessary. City is self-insured for its own negligence, subject to the limits of the Governmental Tort Claims Act (51 O.S. § 151 et seq.).
11. **No Confidentiality.** Seller understands and acknowledges that City is subject to the Oklahoma Open Records Act (51 O.S. §24A.1 et seq.) and therefore cannot assure the confidentiality of contract terms or other information provided by Seller pursuant to this Agreement that would be inconsistent with City's compliance with its statutory requirements thereunder.
12. **Non-Responsive Bids.** Seller understands and acknowledges that if it adds terms and conditions to its Bid that are different from the terms set forth herein that its Bid may be rejected as non-responsive. Furthermore, if City accepts Seller's Bid and awards a contract to Seller based on such Bid, City shall not be bound to any exceptions, changes or additions made by Seller, and any terms and conditions added by Seller which are not expressly agreed to by City in writing will be void and of no force and effect and the parties will be governed according to the document precedence set forth in Section 1 above.
13. **Compliance with Laws.** Seller shall be responsible for complying with all applicable federal, state and local laws, regulations and standards. Seller is responsible for any costs of such compliance. Seller certifies that it and all of its subcontractors to be used in the performance of this Purchase Agreement are in compliance with 25 O.S. Sec. 1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. Sec. 1312 and includes but is not limited to the free Employee Verification Program (E-Verify) available at [www.dhs.gov/E-Verify](http://www.dhs.gov/E-Verify).
14. **Termination.** City, by written notice, may terminate this Agreement, in whole or in part, when such action is in the best interest of City. If this Agreement is so terminated, City shall be liable only for payment for Goods accepted and Services rendered prior to the effective date of termination. City's right to terminate this Agreement is cumulative to any other rights and remedies provided by law or by this Agreement.
15. **Price Changes.** The parties understand and agree that the variables in Seller's cost of performance may fluctuate, but any change in Seller's cost of performance will not alter its obligations under this Agreement, nor excuse performance or delay on Seller's part. If the IFB provides that Seller may include a price escalation provision in its Bid, Seller's price escalation provision will be evaluated by City as part of Seller's Bid price when awarding the Bid.
16. **Right to Audit.** The parties agree that Seller's books, records, documents, accounting procedures, practices, price lists or any other items related to the Goods and/or Services provided hereunder are subject to inspection, examination, and copying by City or its designees. Seller is required to retain all records related to this Agreement for the duration of the term of this Agreement and a period of three years following completion and/or termination of the Agreement. If an audit, litigation or other action involving such records begins before the end of the three year period, the records shall be maintained for three years after the date that all issues arising out of the action are resolved or until the end of the three year retention period, whichever is later.
17. **Notice.** Any notice, demand, or request required by or made pursuant to this Agreement shall be deemed properly made if personally delivered in writing or deposited in the United States mail, postage prepaid, to the addresses specified below.
  - i. To Seller: \_\_\_\_\_
  - To CITY: City Clerk  
CITY OF TULSA, OKLAHOMA  
175 E. 2<sup>nd</sup> Street, Suite 260  
Tulsa, Oklahoma 74103
  - With a copy to: Terry O. Thomas, Senior Buyer  
175 E 2<sup>nd</sup> Street, Suite 575  
Tulsa, OK 74103
18. **Relationship of Parties.** The Seller is, and shall remain at all times, an independent contractor with respect to activities and conduct while engaged in the performance of services for the City under this Agreement. No employees, subcontractors or agents of the Seller shall be deemed to be employees of the City for any purpose whatsoever, and none shall be eligible to participate in any benefit program provided by the City for its employees. The Seller shall be solely responsible for the payment of all employee wages and salaries, taxes, withholding



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payments, fringe benefits, insurance premiums, continuing education courses, materials or related expenses on behalf of its employees, subcontractors, and agents. Nothing in this Agreement shall be construed to create a partnership, joint venture, or agency relationship among the parties. No party shall have any right, power or authority to act as a legal representative of another party, and no party shall have any power to obligate or bind another party, or to make any representations, express or implied, on behalf of or in the name of the other in any manner or for any purpose whatsoever.

19. **Third Parties.** This Agreement is between City and Seller and creates no right unto or duties to any other person. No person is or shall be deemed a third party beneficiary of this Agreement.
20. **Time of Essence.** City and Seller agree that time is deemed to be of the essence with respect to this Agreement.
21. **Binding Effect.** This Agreement shall be binding upon City and Seller and their respective successors, heirs, legal representatives and permitted assigns.
22. **Headings.** The headings used herein are for convenience only and shall not be used in interpreting this Agreement
23. **Severability Provision.** If any term or provision herein is determined to be illegal or unenforceable, the remainder of this Agreement will not be affected thereby. It is the intention of the parties that if any provision is held to be illegal, invalid or unenforceable, there will be added in lieu thereof a provision as similar in terms to such provision as is possible to be legal, valid and enforceable.
24. **Governing Law And Venue.** This Agreement is executed in and shall be governed by and construed in accordance with the laws of the State of Oklahoma without regard to its choice of law principles, which shall be the forum for any lawsuits arising under this Agreement or incident thereto. The parties stipulate that venue is proper in a court of competent jurisdiction in Tulsa County, Oklahoma and each party waives any objection to such venue. City does not and will not agree to binding arbitration of any disputes.
25. **No Waiver.** A waiver of any breach of any provision of this Agreement shall not constitute or operate as a waiver of any other provision, nor shall any failure to enforce any provision hereof operate as a waiver of the enforcement of such provision or any other provision.
26. **Entire Agreement/No Assignment.** This Agreement and any documents incorporated herein constitute the entire agreement of the parties and supersede any and all prior agreements, oral or otherwise. This Agreement may only be modified or amended in a writing signed by both parties. Notwithstanding anything to the contrary stated herein or in the attachments to this Agreement, no future agreements, revisions or modifications that may be required under this Agreement are effective or enforceable unless such terms, revisions or modifications have been reduced to writing and signed by City and Seller. Seller may not assign this Agreement or use subcontractors to provide the Goods and/or Services without City's prior written consent. Seller shall not be entitled to any claim for extras of any kind or nature.
27. **Multiple Counterparts.** This Agreement may be executed in several counterparts, each of which shall be deemed an original, but which together shall constitute one and the same instrument.
28. **Interpretive Matters and Definitions.** The following interpretive matters shall be applicable to this Agreement:
  - 28.1 Unless the context otherwise requires: (a) all references to Sections are to Sections of or to this Agreement; (b) each term defined in this Agreement has the meaning assigned to it; (c) "or" is disjunctive but not necessarily exclusive; (d) words in a singular include the plural and vice versa. All references to "\$" or to dollar amounts shall be in lawful currency of the United States of America;
  - 28.2 No provision of this Agreement will be interpreted in favor of, or against, any of the parties hereto by reason of the extent to which such party or its counsel participated in the drafting thereof or by reason of the extent to which any such provision is inconsistent with any prior draft hereof or thereof;
  - 28.3 Any reference to any applicable laws shall be deemed to refer to all rules and regulations promulgated thereunder and judicial interpretations thereof, unless the context requires otherwise;
  - 28.4 The word "including" means "including, without limitation" and does not limit the preceding words or terms; and
  - 28.5 All words used in this Agreement shall be construed to be of such gender, number or tense as circumstances require.
29. **Equal Employment Opportunity.** Each bidder agrees to comply with all applicable laws regarding equal employment opportunity and nondiscrimination.
30. **Authority to Bind.** The undersigned individual states that s/he has authority to bind Seller to this Agreement, that s/he has read and understands the terms of this Agreement, and that Seller agrees to be bound by this Agreement and its incorporated documents.



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**IMPORTANT NOTE: This document must be signed by the proper person as set forth in Instructions, Terms and Conditions for Bidders, paragraph 4. 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: \_\_\_\_\_

\_\_\_\_\_  
Corporate Secretary

Date: \_\_\_\_\_

Company Name/Address [Please Print] \_\_\_\_\_ Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

( ) \_\_\_\_\_ ( ) \_\_\_\_\_  
Telephone Number \_\_\_\_\_ Fax Number \_\_\_\_\_ Email Address \_\_\_\_\_

**CITY OF TULSA, OKLAHOMA,  
a municipal corporation,**

ATTEST:

By: \_\_\_\_\_  
Mayor

\_\_\_\_\_  
City Clerk

Date: \_\_\_\_\_

APPROVED:

\_\_\_\_\_  
Assistant City Attorney



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**FORM #3**

**INTEREST AFFIDAVIT**

STATE OF \_\_\_\_\_ )

)ss.

COUNTY OF \_\_\_\_\_ )

I, \_\_\_\_\_, of lawful age, being first duly sworn, state that I am the agent authorized by Seller to submit the attached Bid. Affiant further states that no officer or employee of the City of Tulsa either directly or indirectly owns a five percent (5%) interest or more in the Bidder's business or such a percentage that constitutes a controlling interest. Affiant further states that the following officers and/or employees of the City of Tulsa own an interest in the Bidder's business which is less than a controlling interest, either direct or indirect.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

By: \_\_\_\_\_  
Signature

Title: \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
Notary Public

My Commission Expires: \_\_\_\_\_

Notary Commission Number: \_\_\_\_\_

County & State Where Notarized: \_\_\_\_\_

**The Affidavit must be signed by an authorized agent and notarized**





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**FORM #4**

**NON-COLLUSION AFFIDAVIT**

(Required by Oklahoma law, 74 O.S. §85.22-85.25)

STATE OF \_\_\_\_\_ )

)ss.

COUNTY OF \_\_\_\_\_ )

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

1. I am the authorized agent of Seller herein for the purposes of certifying 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 Bid to which this statement is attached.
2. I am fully aware of the facts and circumstances surrounding the making of Seller's Bid to which this statement is attached, and I have been personally and directly involved in the proceedings leading to the submission of such Bid; and
3. Neither the Seller nor anyone subject to the Seller's direction or control has been a party:
  - a. to any collusion among Bidders in restraint of freedom of competition by agreement to Bid at a fixed price or to refrain from Bidding,
  - b. to any collusion with any municipal official or employee as to quantity, quality, or price in the prospective contract, or as to any other terms of such prospective contract, nor
  - c. in any discussions between Bidders and any municipal official concerning exchange of money or other thing of value for special consideration in the letting of a contract.

By: \_\_\_\_\_  
Signature

Title: \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
Notary Public

My Commission Expires: \_\_\_\_\_

Notary Commission Number: \_\_\_\_\_

County & State Where Notarized: \_\_\_\_\_

**The Affidavit must be signed by an authorized agent and notarized**



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**FORM #5**

**AFFIDAVIT OF CLAIMANT**

STATE OF \_\_\_\_\_ )

)ss.

COUNTY OF \_\_\_\_\_ )

The undersigned person, of lawful age, being first duly sworn on oath, says that all invoices to be submitted pursuant to this agreement with the City of Tulsa will be true and correct. Affiant further states that the work, services or material furnished will be completed or supplied in accordance with the plans, specifications, orders, requests and/or contract furnished or executed by the affiant. Affiant further states that (s)he has made no payment directly or indirectly to any elected official, officer or employee of the City of Tulsa or of any public trust where the City of Tulsa is a beneficiary, of money or any other thing of value to obtain payment of the invoice or procure the contract or purchase order pursuant to which an invoice is submitted. Affiant further certifies that (s)he has complied with all applicable laws regarding equal employment opportunity.

Company: \_\_\_\_\_

Remit to Address: \_\_\_\_\_

City, State  
Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Name (print): \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public

My commission expires: \_\_\_\_\_

My commission number: \_\_\_\_\_

County and State where notarized: \_\_\_\_\_

**The Affidavit must be signed by an authorized agent and notarized**



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**FORM #6**

**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 Bid Packet and will become a part of any resulting contract.

List Date and Title/Number of all addenda or amendments: (Write "None" if applicable).

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**Sign Here ►**

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

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## INSTRUCTIONS, TERMS AND CONDITIONS FOR BIDDERS

1. **PURCHASING AUTHORITY.** City issues this Invitation For Bid pursuant to Tulsa City Charter, Art. XII, §14 and Tulsa Revised Ordinances, Title 6, Ch. 4, the provisions of which are incorporated herein.
2. **DEFINITIONS.** The following terms have the following meanings when used in the documents comprising this Bid Packet.
  - A. **“Acceptance”** with respect to a Bid shall mean the City’s selection of a Bid, and award of a contract to the Bidder/Seller.
  - B. **“Acceptance”** with respect to delivery of Goods and/or Services provided under a Purchase Agreement shall mean City’s written acknowledgement that Seller has satisfactorily provided such Goods and/or Services as required.
  - C. **“Addenda” “Addendum” or “Amendment(s)”** shall mean a clarification, revision, addition, or deletion to this Invitation For Bid by City which shall become a part of the agreement between the parties.
  - D. **“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. An Authorized Agent must sign all documents in the Bid Packet on behalf of the Seller. Under Oklahoma law, the Authorized Agent for each of the following types of entities is as stated below:
    - **Corporations** – the president, vice president, board chair or board vice chair can sign; others can sign if they have and provide the City with (i) a corporate resolution giving them authority to bind the Seller, and (ii) a recent corporate secretary’s certificate indicating the authority is still valid.
    - **General Partnerships** – any partner can sign to bind all partners.
    - **Limited Partnerships** – the general partner must sign.
    - **Individuals** – no additional authorization is required, but signatures must be witnessed and notarized.
    - **Sole Proprietorship** – the owner can sign. Any other person can sign if s/he provides a recent Power of Attorney, signed by the owner, authorizing him/her to bind the sole proprietorship.
    - **Limited Liability Company (LLC)** – The manager as named in the Operating Agreement can sign. Any person authorized by the Operating Agreement or a member can sign providing the person submits a copy of the authorization with a certificate of the members indicating the authorization is still valid.Entities organized in States other than Oklahoma must follow the law of the State in which they are organized.
  - E. **“Bid”** means the Seller’s offer to provide the requested Goods and/or Services set forth in Exhibit A and any additional materials or information the Seller chooses to submit to support the Bid.
  - F. **“Bidder”** means the legal entity which submits a Bid for consideration by City in accordance with the Invitation For Bid.
  - G. **“Bid Packet”** consists of the following documents (1) the Notice of Invitation for Bid, (2) the Summary Sheet, (3) Form #1, (4) Form #2, (5) Form #3, (6) Form #4, (7) Form #5, (8) Form #6, (9) the Instructions, Terms and Conditions for Bidders, (10) Special Requirements, (11) Technical Specifications, and (12) Exhibit A.
  - H. **“Bid Submission Date”** shall mean the last date by which the City will accept Bids for an Invitation For Bid.
  - I. **“City”** shall mean the City of Tulsa, Oklahoma.
  - J. **“Days”** shall mean calendar days unless specified otherwise.
  - K. **“Primary Seller”** shall mean the Seller whose Bid City selected as the principal supplier of the Goods and/or Services required under this Agreement.
  - L. **“Project Buyer”** shall mean the City’s employee assigned to serve as the contact person for Bidders/Sellers responding to Invitations For Bid or completing contracts herein.
  - M. **“Purchasing Division or Office”** shall mean the City of Tulsa’s Purchasing Division, located at 175 East 2<sup>nd</sup> Street, Suite 865, Tulsa, Oklahoma 74103
  - N. **“Secondary Seller”** shall mean the Seller whose Bid City selected as a back-up supplier in the event the Primary Seller is unable to provide all the Goods and/or Services required.



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- O. **“Seller”** shall mean the Bidder whose Bid City selected and awarded a contract.
- P. **“You” or “Your”** shall mean the Bidder responding to this Invitation For Bid or the Seller whose Bid the City selected and awarded a contract.
- Q. **“Website”** shall mean the City of Tulsa’s website for the Purchasing Division: [www.cityoftulsapurchasing.org](http://www.cityoftulsapurchasing.org).

3. **QUESTIONS REGARDING INVITATION FOR BID.** Questions regarding any portion of this Invitation For Bid must be submitted in writing (sent by mail, fax or email) to the Project Buyer indicated on the Summary Sheet herein. You should submit questions as early as possible and preferably before the pre-Bid conference. Questions and concerns must be received no later than ten (10) days prior to the Bid Packet due date. Any oral responses to questions before the contract is awarded are not binding on City. At City’s discretion, any information or clarification made to you may be communicated to other Bidders that notified City of their intent to Bid if appropriate to ensure fairness in the process for all Bidders. You must not discuss questions regarding the Invitation For Bid with anyone other than the Project Buyer or other Purchasing Division staff or your Bid may be disqualified, any contract recommendation or Acceptance may be rescinded, or any contract may be terminated and delivered Goods returned at your expense and City refunded any payments made.
4. **ORAL STATEMENTS.** No oral statements by any person shall modify or otherwise affect the provisions of this Invitation For Bid and/or any contract resulting therefrom. All modifications, addenda or amendments must be made in writing by City’s Purchasing Division.
5. **EXAMINATION BY BIDDERS.** You must examine the specifications, drawings, schedules, special instructions and the documents in this Bid Packet prior to submitting any Bid. Failure to examine such documents and any errors made in the preparation of such Bid are at your own risk.
6. **ADDENDA OR AMENDMENTS TO INVITATIONS FOR BID.** City may addend or amend its Invitation For Bid at any time before the Bid Submission Date, and any such addenda or amendments shall become a part of this Agreement. City will attempt to send a notification (by fax or email) of any addenda or amendments to those Bidders who have responded to the City’s Project Buyer of their intent to respond to the Invitation For Bid. However, it is your responsibility to inquire about any addenda or amendments, which will be available from the City’s Purchasing Division and its website. You must acknowledge receipt of any addenda or amendments by signing and returning the Acknowledgment of Receipt of Addenda/Amendments form and attaching it to this Invitation For Bid with your Bid. City may reject any Bid that fails to acknowledge any addenda or amendments.
7. **SPECIFICATIONS/DESCRIPTIVE TERMS/SUBSTITUTIONS.** Unless the term “no substitute” is used, the City’s references to a brand name, manufacturer, make, or catalogue designation in describing an item in this Bid Packet does not restrict you to that brand or model, etc. The City may make such references to indicate the type, character, quality and/or performance equivalent of the item desired. However, you are required to furnish the exact item described in your Bid unless a proposed substitution is clearly noted and described in the Bid.

The parties recognize that technology may change during the period Bids are solicited and subsequent contracts are performed. Therefore, City may at its option accept changes or substitutions to the specifications for Goods of equal or better capabilities at no additional cost to City. In the case of existing contracts, you shall give City 30 days advance notice in writing of any such proposed changes or substitutions. City shall determine whether such items are acceptable as well as any proposed substitute.

All Goods shall be new unless otherwise so stated in the Bid. Any unsolicited alternate Bid, or any changes, insertions, or omissions to the terms and conditions, specifications, or any other requirements of this Bid, may be considered non-responsive and the Bid rejected.

8. **PRICES/DISCOUNTS.** Prices shall be stated in the units and quantity specified in the Bid Packet documents. In case of discrepancy in computing the Bid amount, you guarantee unit prices to be correct and such unit prices will govern. Prices shall include transportation, delivery, packing and container charges, prepaid by you to the destination specified in the Specifications. Discounts for prompt payment will not be considered in Bid evaluations, unless otherwise specified. However, offered discounts for prompt payment will be taken if payment is made within the discount period.
9. **DELIVERY.** All prices quoted shall be based on delivery F.O.B. Tulsa, Oklahoma or to any other points as may be designated in the Technical Specifications, with all charges prepaid by Seller to the actual point of delivery. Bids must state the number of days required for delivery under normal conditions.



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10. **TAXES.** City is exempt from federal excise and state sales taxes and such taxes shall not be included in the Bid prices.
11. **BID SUBMISSION.** The Bid Packet forms must be prepared in the name of Bidder and properly executed by an Authorized Agent with full knowledge and acceptance of all provisions, in ink and notarized. Bids may not be changed or withdrawn after the deadline for submitting Bids (the "Bid Submission Date"). A Bid is an irrevocable offer and when accepted by City (as evidenced by City's execution of the Purchase Agreement) shall constitute a firm contract.
- A. BIDS MUST BE SUBMITTED ONLY ON THE BID PACKET FORMS AND SIGNED BY AN AUTHORIZED AGENT. THE ENTIRE BID PACKET MUST BE RETURNED AS RECEIVED WITH ALL FORMS COMPLETED. YOU MAY ATTACH, AFTER EXHIBIT A, ANY DOCUMENTS NECESSARY TO COMPLETELY AND ACCURATELY RESPOND TO THE REQUEST. BIDS MUST BE IN STRICT CONFORMANCE WITH ALL INSTRUCTIONS, FORMS, AND SPECIFICATIONS CONTAINED IN THIS BID PACKET.**
- B.** Sealed Bids may be either mailed or delivered, but must be received at:  
City of Tulsa – Office of City Clerk  
175 East 2<sup>nd</sup> Street, Suite 260  
Tulsa, Oklahoma 74103
- C.** Bids will be accepted at the above address from 8:00 a.m. to 5:00 p.m., Monday thru Friday except for City holidays. City is not responsible for the failure of Bids to be received by the City Clerk's Office prior to the due date and time.
- D.** Late Bids will be **rejected**. The Purchasing Agent, in his sole discretion, may make exceptions only for the following reasons:
1. City Hall closed for business for part or all of the day on the date the response was due;
  2. If the City deems it appropriate due to large-scale disruptions in the transportation industry that may have prevented delivery as required.
  3. If documented weather conditions caused the late delivery. You must provide documentation of such weather to the satisfaction of the Purchasing Agent.
- E.** **City will not accept faxed Bids**, nor will City accept Bids faxed to the City Clerk, Purchasing Division or Office, or any other City office or employee.
- F.** City is not responsible for any of your costs in preparing the Bid response, attending a pre-Bid conference, or any other costs you incur, regardless of whether the Bid is submitted, accepted or rejected.
- G.** All Bids must be securely sealed and plainly marked with the Bid Number, Bid Title, and Bid Opening Date on the lower left corner of the outside of the Bid envelope. Your name and address must also be clearly indicated on the envelope.
- H.** If submitting multiple options ("Option(s)") to the Invitation for Bid, each will be considered separately requiring each response to be complete and accurate. Each Option must be clearly marked as Option 1 of 3, Option 2 of 3, etc.
- I.** The number of copies you must submit is listed on the Summary Sheet in the front of the Bid Packet. However, at a minimum, there will be (1) an original, clearly labeled as such in 1" red letters on the Bid Packet cover page, and (2) a copy for City's Purchasing Division, clearly labeled as such in 1" red letters on the Bid Packet cover page. If binders are used, they must also be labeled.
- J.** Multiple boxes or envelopes are permissible, but must not weigh more than 50 pounds. Each box must be labeled as instructed herein and numbered (i.e., Box 1 of 3; Box 2 of 3). **The original must be in Box #1.**
- K.** The original and all copies (either paper or electronic) must be identical in all respects. Bids must be completed and submitted in ink or typewritten. Bids written in pencil will be rejected. Any corrections to the Bids must be initialed in ink.
12. **BID REJECTION OR WITHDRAWAL.**
- A. City may reject any or all Bids, in whole or in part.
  - B. **A Bid may be rejected if it contains additional terms, conditions, or agreements that modify the requirements of this Invitation For Bid or attempts to limit Bidder's liability to the City.**
  - C. A Bid may be rejected if Bidder is currently in default to City on any other contract or has an outstanding indebtedness of any kind to City.
  - D. City reserves the right to waive any formalities or minor irregularities, defects, or errors in Bids.
  - E. Bid withdrawal may only be accomplished by an Authorized Agent requesting the withdrawal in person at the City Clerk's office before the City's close of business on the Bid Submission Date.
13. **BID RESULTS.** A tabulation of Bids received will be made available on the City's Purchasing Division website generally within 5 working days after the Bid Opening Date. After a contract award is recommended to the Mayor, a copy of the Bid summary will be available in the City Clerk's Office. Bid results are not provided in response to telephone or email inquiries.
14. **PURCHASE ORDER.** In the event that the successful Bid is for an amount less than One Hundred Thousand Dollars (\$100,000), and it is determined by the City to be in the best interests of the City, the City, in its sole discretion, may issue a Purchase Order rather than execute the Purchase Agreement to purchase the Goods. If a Purchase Order is issued, however, the terms of the Bid Packet documents, including the Purchase Agreement, will govern the transaction and be enforceable by the City and Bidder/Seller.



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15. **CONTRACT AWARD.** If a contract is awarded, it will be awarded to the Bidder that City determines is the lowest secure Bidder meeting specifications. Such Bid analysis will consider price and other factors, such as Bidder qualifications and financial ability to perform the contract, as well as operating costs, delivery time, maintenance requirements, performance data, history of contract relations with City, and guarantees of materials and equipment, as applicable. A complete list of the factors that are considered is set forth in Tulsa Revised Ordinances, Title 6, Ch. 4, §406E. Unless otherwise noted, City reserves the right to award a contract by item, one or more groups of items, or all the items in the Bid, whichever is in City's best interest.
16. **IRS FORM W-9.** If City selects your Bid and awards a contract to you, you will have ten (10) days from notification of the award to provide City with your complete IRS Form W-9.
17. **NOTICE TO PROCEED.** If City accepts your Bid and executes the Purchase Agreement, you shall not commence work until authorized to do so by the Purchasing Agent or his representative. Receipt of a Purchase Order from the City is notice to proceed.
18. **PAYMENTS.** Invoices should be e-mailed to City of Tulsa – Accounts Payable at:

[apinvoices@cityoftulsa.org](mailto:apinvoices@cityoftulsa.org)

Payment will be made Net 30 days after receipt of a properly submitted invoice or the City's Acceptance of the Goods and/or Services, whichever is later, unless City decides to take advantage of any prompt payment discount included in the Bid.

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**SPECIAL REQUIREMENTS**

**1. Irrevocable Offer Period.** You understand and acknowledge that the offer submitted as your 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. General Liability/Indemnification.** You shall hold City harmless for any loss, damage or claims arising from or related to your performance of the Purchase Agreement. You must exercise all reasonable and customary precautions to prevent any harm or loss to all persons and property related to the Purchase Agreement. You agree to indemnify and hold the City harmless from all claims, demands, causes of action or suits of whatever nature arising out of the Goods, Services, labor, or materials furnished by you or your subcontractors under the provisions of the Bid Packet documents.

**3. Liens.** Pursuant to City's Charter (Art. XII, §5), no lien of any kind shall exist against any property of City. Bidder shall deliver all goods to City free and clear of liens. Delivery by Seller to City of goods which are subject to liens under the Purchase Agreement shall be a material breach of the Purchase Agreement and all damages and costs incurred by City as a result of the existence of such liens shall be paid to City by Seller. At City's option, City may return such goods to Seller and Seller shall pay the cost of returning such goods and reimburse City for any payments made for such goods.

**4. Insurance.** If checked "Yes," the following insurance is required: Yes:      No: X

Seller and its subcontractors must obtain at Seller's expense and keep in effect during the term of the Purchase Agreement, including any renewal periods, policies of General Liability insurance in the minimum amounts set forth below and Workers' Compensation insurance in the statutory limits required by law.

**5. Bonding.**

**A. Bid Bond.** If the box is checked "Yes," the Bid Bond is required:

Yes:      No: X

**B. Performance Bond.** If the box is checked "Yes," the Performance Bond is required:

Yes:      No: X

**6. References.** If the box is checked "Yes," References are required:

Yes: X No:     

Follow the directions given in Section 2.0 Minimum Bidder Requirements of REQUIREMENTS AND SERVICES TO BE PROVIDED.

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**TECHNICAL SPECIFICATIONS**

**SCOPE:**

It is the intent of this bid to secure, on a competitive basis, a source of supply for furnishing all labor, equipment, and management to perform Collection Services as required for the City of Tulsa. There is no guaranteed amount of work to be performed.

**BACKGROUND**

The Current City Ordinances provide the following; Subject to the provisions of the Amended Charter and the Tulsa Revised Ordinances, and as provided in 11 O.S. Section 22-138.A.1., the Mayor, on behalf of the City, shall be authorized to enter into an agreement with a collection agency for the provision of collection services for debts and accounts receivable including but not limited to unpaid charges, fees, penalties, interest and other sums due the City.

Upon the City entering into an agreement with a collection agency, as authorized in Subsection A of this section, an additional sum may be added to the original amount of the indebtedness to reimburse the City the actual and agreed upon collection fee arising from the agreement with the collection agency in an amount not to exceed thirty-five percent (35%) of the original indebtedness.

**SPECIFICATIONS:**

To be considered a qualified Bidder, the bidder must be able to provide the following services to the City: programming assistance to enable secure data transfers from the City of Tulsa; preferably web-based collection software to support all collection operations; specialized collection notices; call center personnel and technology; and legal resources to assure compliance with all applicable federal, Oklahoma and City laws, regulations and ordinances. The Bidder agrees to exercise due diligence on all accounts to effect collection of these accounts. The Seller agrees that in the collection of accounts under this Agreement, it will never harass or exert undue pressure on delinquent debtors or employ any procedure which would violate any local, state or federal law, create a cause of action against the City of Tulsa, cause discredit upon the City of Tulsa or subject the City of Tulsa or its officials to defamation.

The Seller shall render prompt and courteous service to all persons with whom it deals in collecting City of Tulsa accounts.

The Seller agrees to accept for collection, as specified by the Director of Finance of the City of Tulsa, or his designee, returned checks, obligations, deferred payments, or accounts as the City of Tulsa shall refer to the Collector from time to time. This includes accounts that may be significantly past dated. The Seller shall promptly acknowledge in writing the receipt of accounts for collection.

**LAWFUL MEANS:**

The Seller agrees to exercise due diligence on all accounts to effect collection of these accounts and to employ such lawful means, methods and procedures as in its judgment, discretion and experience it believes it will effect collections and settlements. The Seller further agrees that in the collection of accounts under this Agreement, it will never harass or exert undue pressure on delinquent debtors or employ any procedure which would violate any local, state or federal law, create a cause of action against the City of Tulsa, cause discredit upon the City of Tulsa or subject the City of Tulsa or its officials to defamation.

The Seller shall render prompt and courteous service to all persons with whom it deals in collecting City of Tulsa accounts. The Seller agrees to contact and attempt to collect all accounts received from the City of



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Tulsa promptly and reasonably.

**LEGAL ACTION:**

The Seller agrees not to commence any legal action against any debtor without prior written consent from the Director or his designee with the Mayor's approval.

**FALSE REPRESENTATION:**

The Seller further agrees not to use any false, deceptive or misleading representations or means including the use of any name by the Seller or any of its agents other than its or their true names when communicating with delinquent debtors. The Seller is an independent entity and shall not represent itself to be an agent, employee or officer of the City of Tulsa, or a member of the Tulsa Police Department.

**SETTLEMENT WITHOUT AUTHORITY:**

No account referred to the Seller from Neighborhood Inspections invoices (a segment of General Accounts Receivable) shall be collected in installments or be finally compromised or settled for less than the full amount thereof, unless otherwise instructed by the City of Tulsa.

**PAYMENTS:**

The Seller may direct debtors to remit payments to the Seller unless otherwise instructed by the City of Tulsa. The Seller will remit 100% of the funds in its possession together with a detail report to the City of Tulsa on a monthly basis for General Accounts Receivable. The Seller will invoice the City of Tulsa for their compensation. The City of Tulsa will determine the frequency with which the Seller will remit the funds.

It is required that General Accounts Receivable sends and receives daily electronic reporting and confirmation of file transfers. General Accounts Receivable strongly prefers F.T.P. transfers.

**RECALL:**

The Director of Finance or his designee may at any time, orally or in writing, recall any account which was referred to Seller under this agreement, and upon such recall, the Seller shall immediately return the account, including any applicable files, to the City of Tulsa, cease all collection activities, and cancel its file thereon without any charge to the City of Tulsa except as provided in the Agreement.

**SECONDARY OR BACK-UP SOURCE:**

The City reserves the right to enter into agreement with a secondary collection agency to be used as a back-up source. This source would be used only in the event of the failure of the primary source to supply the full needs of the City. The City does not currently have plans to send accounts to a secondary agency.



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**REQUIREMENTS AND SERVICES TO BE PROVIDED**

**1.0 Minimum Qualifications:**

- 1.1. The Bidder shall not be a creditor or an employee of the City of Tulsa.
- 1.2. The Bidder shall be licensed, registered, and authorized to collect debt in Tulsa, Oklahoma and throughout the United States.
- 1.3. The Bidder shall have sufficient knowledge of all applicable federal, Oklahoma and local laws and regulations regarding debt collection, including in particular the Fair Debt Collection Practices Act ("FDCPA").
- 1.4. The Bidder shall be able to demonstrate the ability to skip trace, mail, and call a high volume of collection accounts.
- 1.5. The Bidder shall demonstrate the capability to provide computer technical support for any initial programming required to transfer all necessary collection data to Bidder in a timely manner.
- 1.6. The Bidder shall institute methods specified by the City of Tulsa for safeguarding the rights of individuals subject to collection. All practices must comply with Oklahoma and federal consumer and collection practice laws, including the FDCPA, where applicable.
- 1.7. Bidder shall have been involved in the collection of delinquent government receivables for at least three (3) years.

**2.0 Minimum Bidder Requirements:**

- 2.1. At the request of the evaluation committee, a Bidder may be requested to submit a complete set of audited financial statements for the year ended December 31, 2016, or if your firm's fiscal year is other than December 31, 2016, the most recent year-end for which audited financial statements are available. If your firm is not audited, the Seller may submit a complete set of compiled financial statements considering the same fiscal year end information as above.
- 2.2. If financial statements are requested, they must reflect an operating profit. Current ratio must exceed 1:1.
- 2.3. The Bidder agrees not to use any false, deceptive or misleading representations or means including the use of any name by the Bidder or any of its agents other than its or their true names when communicating with delinquent debtors. The Bidder is an independent contractor and shall not represent itself to be an agent, employee or officer of the City of Tulsa.
- 2.4. The Bidder shall provide a detailed resume of qualified and experienced person who will be the main contact to the City after notification of award.
- 2.5. The Bidder shall list current government clients for which it provides the same or similar type services. The bidder shall separately identify other current customer relationships where it provides same or similar type of services.



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- 2.6. The Bidder shall provide a detailed description of two (2) comparable customer relationships (similar in scope of services to those requested herein) which the Bidder has either ongoing or completed within the past three (3) years. The description should identify for each relationship: (1) the client; (2) the description of work; (3) the total dollar value of the agreement; (4) the duration of the agreement; (5) a client contact, telephone number; and (6) a statement as to whether the Bidder was the prime Seller or subcontractor for each of these projects.
- 2.7. A Bidder shall be ineligible to provide the services set forth in this IFB if the Bidder, or owner, operator, or any officer of Bidder, has been convicted of a felony.

### **3.0 Seller requirements:**

- 3.1. The Seller shall ensure the confidentiality and security of the City of Tulsa's data.
- 3.2. Seller shall keep records of all disputes and complaints, investigate the same, and report the results to the City of Tulsa as requested.
- 3.3. The Seller shall remit to the City, on a monthly basis, one hundred percent (100%) of all City of Tulsa funds in their possession, including the collection fee. The Seller may invoice the City of Tulsa for their compensation.
- 3.4. The Seller shall provide reports as requested by the City relating to the collection of these accounts in a timely fashion.
- 3.5. No account referred to the Seller from the City shall be finally compromised or settled for less than the full amount thereof, without written approval from the City.
- 3.6. There shall be no cost assessed to the City of Tulsa on accounts deemed uncollectible or returned as uncollected or recalled.
- 3.7. Seller shall be responsible for returning collection accounts to the City of Tulsa immediately upon recall. The selected Seller shall stop all collection activity immediately when notified by the City to cancel any account(s). The City of Tulsa reserves the right to reevaluate, adjust, cancel or recall any account(s) assigned to the selected Seller for collection.
- 3.8. Seller shall be solely responsible for all costs and expenses associated with the agreement, including, but not limited to, all necessary developing, copying, faxing, and postal costs.

### **4.0 City Requirements**

- 4.1. The City of Tulsa, in the City's sole and complete discretion, may transfer delinquent Accounts Receivables to the Seller for the Seller to provide services regarding the collection of the accounts.
- 4.2. The City of Tulsa will ensure that only accounts delinquent are transferred to the selected Seller.
- 4.3. The City of Tulsa shall determine the most effective method of transferring accounts to the selected Seller. The City of Tulsa will notify the selected Seller when accounts are ready for transfer or arrange a periodic automatic transfer.
- 4.4. The City of Tulsa reserves the right, at any time, for any reason whatsoever and without penalty, to recall any assigned account(s) and will not be responsible for any costs incurred by the selected Seller



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for the recalled account(s).

- 4.5. The City of Tulsa will notify the selected Seller of any adjustments or corrections made to the amount due of any collection account assigned to Seller.

## 5.0 Bid Requirement

- 5.1. The entire bid packet must be returned as received with all forms completed. Nothing should be inserted or written in or on the Bid Packet, except the pricing on Exhibit A.
- 5.2. Response to any items must be on separate sheets of paper and placed after Exhibit A of the Bid Packet. The response shall be written in sufficient detail to permit the City of Tulsa to conduct a meaningful evaluation of the proposed services. The evaluation committee must be able to easily locate the responses to the City's specific questions/requirements. The Bidder shall construct their bid in a manner designed to address the requested information in an order equal to that which is given by this document. **Responses should be as concise and clear as possible.**
- 5.3. Any bidder who responds to this invitation for sealed bid without following this request takes the risk of being rejected.

## 6.0 Bid Presentation

The response should be presented in the format indicated below and should include the following information:

### 6.1 Cover Letter

- a) The letter shall include the TAC #, Bidder's name, address, contact person, and contact telephone number.

### 6.2 Minimum Qualifications and Requirements

- a) Address the qualifications and requirements as outlined in Sections 4.1 and 4.2.

### 6.3 Experience/Qualifications of the Bidder

- a) State the number of years that the Bidder has been in existence and has been performing collection services regarding the collection of delinquent accounts.
- b) Describe the Bidder's experience in performing collection services as requested in the IFB. Bidder shall provide proof of registration with the Oklahoma Secretary of State and any necessary documentation as a debt collector in the State of Oklahoma.
- c) Describe any other experiences related to the work and services described in this IFB.
- d) Describe any features that distinguish the Bidder and its services from other firms who provide collection services regarding the collection of delinquent accounts.
- e) Describe any current or previous agreements you signed with the City of Tulsa.

### 6.4 Technical Ability



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- a) Provide a general description of how the Bidder will provide the collection services requested in this IFB.
- b) Describe your firm's skill level in skip tracing. What licenses are used? (If any).
- c) Describe any other methods of tracing used by your firm.
- d) A sample letter from the Seller to an account MUST be provided. The City of Tulsa is interested in viewing the text of the letters as well as any standard printed material that will be used to contact accounts "up front". The City of Tulsa reserves the right to modify any sample letter used for City of Tulsa accounts by the agency at any time. Acceptable time frame for Seller to implement any letter modification(s) is no more than 10 business days.
- e) Provide answers to the following questions: How are payments accepted? If credit cards are accepted, would the City of Tulsa or the debtor be responsible to pay the transaction fee? Does your system include a 24/7 IVR, online capability, or a live agent only? Are checks verified for valid checking accounts? How are NSF checks handled? Does 100% of the face value go to the City of Tulsa?
- f) Indicate how the Bidder will address community relations while maximizing collection results.
- g) Describe Bidder's collection procedures. This description should include, but not necessarily be limited to, a comprehensive explanation of how collection accounts are handled upon referral to the Bidder, skip tracing resources, the Bidder's method(s) relative to how the City of Tulsa will be notified concerning the status of collection accounts, and how deposits are handled by Bidder.
- h) Describe the Bidder's settlement procedures.
- i) Describe how Bidder will accept electronic transfer of accounts.
- j) Describe the Bidder's policies and methods regarding payment to the City of Tulsa, including Bidder's approach for handling stolen or lost payments.
- k) Volume of complaints and litigation for the three years 2014-2016, inclusive.
- l) Percentage of litigation decided / settled in plaintiff's favor.
- m) Describe the vehicle and or format(s) to be used to report collection information, payment details, and performance statistics to the City. Also describe your system's flexibility to accommodate the City's requests, if any, for future format modifications. Provide sample copies of statistical reports and monthly statements. Describe the firm's current ability to directly, electronically communicate collection information and data to and from the City.
- n) Describe any available web-based tools that would enable the City to review collection activities, analyze the inventory and create ad-hoc reports.

### **6.5 Key Personnel and Third Parties Performing Services**

- a) Provide an organization chart showing all individuals assigned to this project. This chart should clearly identify the Bidder's employees and any third party (or parties).



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- b) Describe the experience, qualifications, licenses held and other vital information, including relevant experience on similar projects, of all key individuals and third parties who may be assigned to this project.
- c) Provide resumes, with job descriptions and other detailed qualification information, regarding all key personnel who may be assigned to this project.
- d) List all current officers of the bidder.
- e) Describe training programs for new employees and existing employees to keep them current concerning all relevant collection practices, laws, and regulations.

## **7.0 Bid Evaluation**

Upon receipt by the due date and time of responses to this IFB, the City's selection committee will review the Bids for completeness and adherence to the provisions of the IFB.

Aspects of all Bids and qualifications statements shall be evaluated with the following criteria. There is no order of significance implied.

### **7.1 Overall Experience, Capabilities and Minimum Requirements**

Bidder demonstrates the required experience, capabilities and minimum requirements. References of similar past assignments are required regarding the collection of delinquent accounts.

## **8.0 Miscellaneous**

- 8.1.** The City's agreement with Municipal Services Bureau ("MSB"), the current Seller, has gone full term and all extensions have been exercised. MSB currently charges 15.5% on the contact. The agreement expired on Oct 22, 2017.
- 8.2.** Remaining portfolio currently with the Seller amounts to \$5.7M. The City placed approximately 1500 accounts worth \$1.3M with the seller from January to September, 2017. YTD liquidation rate is approximately 37%. Historical liquidation rate has amounted to 25%. Accounts placed with the seller go as far back as 2009.
- 8.3.** If this agreement for the collection of accounts receivables is awarded to a different Seller, other than the incumbent, accounts listed with the current Seller will be recalled and forwarded to the new Seller.
- 8.4.** Service from the selected seller will commence after the legal department approves the agreement and the Mayor executes the agreement.
- 8.5.** Types of delinquent accounts that will be placed with the seller include invoices stemming from nuisance abatements, police overtime and returned checks. Liens are filed on delinquent nuisance abatement accounts before they are placed with the collection agency.
- 8.6.** Payments may be made at the City or to the seller if there are no liens against the property. Payments must be made to the County if liens were filed against the property.



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- 8.7. Owner information, including names and addresses are included on all accounts sent to the Seller. Social Security numbers will not be included.
- 8.8. The City will send regular electronic updates to the seller. Two FTP files (payment and collection), are sent every weeknight. Blank files are sent if no payment has been made or no new accounts have been added.
- 8.9. Bidder's physical location will only factor in the evaluation if Bidders are equally matched.

**9.0 Cost**

Bidder must complete and sign Exhibit A delivery and pricing form. No other fees or costs will be allowed.

**Assignment of evaluation points is as follows:**

Item	Description	Points
6.0, 6.1	Bid Format	5
6.2	Minimum Qualification & Requirements	15
6.3	Experience/Qualification	20
6.4	Technical Ability	25
6.5	Key Personnel	10
7.1	Overall Experience	10
9.0	Pricing	15
<b>TOTAL</b>		<b>100</b>

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**EXHIBIT A  
BID FORM INCLUDING DELIVERY AND PRICING**

**1. Delivery.**

You must be able to deliver the Goods and/or Services as specified in your Bid. Failure to do so may result in City terminating your contract or canceling the Purchase Order, pursuing collection under any performance bond, as well as seeking any other damages to which it may be entitled in law or in equity.

**2. Pricing (Item 9.0 on Evaluation Criteria)**

Item	Description	Percentage (%)
<b>TOTAL COST NOT TO EXCEED: (All costs must be included or your Bid will be disqualified )</b>	Collection Agency Fee %*	_____

**SEE THE EXAMPLE CALCULATION BELOW FOR HOW THIS FEE WILL BE APPLIED. THIS ASSUMES A \$100 DEBT AND ASSUMES THAT A COLLECTION AGENCY FEE OF 25% IS BID IN ITEM 1 ABOVE.**

<b>Amount of Debt</b>	<b>\$100</b>	
<b>\$ Collection Agency Fee</b>	<b>+ 25</b>	<b>NOTE: (25% OF \$100 = \$25)</b>
<b>Total to be Collected &amp; Remitted to City</b>	<b>\$125</b>	
<b>Less: Collection Fee to be Paid to Agency by City</b>	<b>- 25</b>	
<b>Net to City</b>	<b>\$100</b>	

Bidder's Company Name \_\_\_\_\_

**Authorized Signature Here** ► \_\_\_\_\_

Printed Name: \_\_\_\_\_

**RETURN THIS ENTIRE BID PACKET**