



City of Bloomington Utilities  
Vendor Guide

# Introduction

Thank you for your interest in doing business with City of Bloomington Utilities Department. The Purchasing Department provides the City of Bloomington water, wastewater and storm water utilities with overall procurement services.

This booklet was prepared in order to assist you in selling your products and services to the City of Bloomington Utilities Department. It is to be used as a general guide only; it is not a statement of policy. We hope it answers most of your questions regarding procurement at CBU.

The Policies and Procedures outlined herein are accurate as of the publication date. However, Policies can and do change, and are reviewed periodically by the CBU staff and the City of Bloomington Utilities Service Board. This board has sole authority to set and change policies for the City of Bloomington Utilities Department. If you need further information please contact the CBU Purchasing Department at (812) 349-3677.

Vendors are welcome to visit the CBU Purchasing Department after arranging an appointment prior to a visit by calling (812) 349-3677. Normal office hours are 8:00 am to 5:00 pm Monday through Friday (closed legal holidays). Our office is located at 600 E. Miller Dr., Bloomington, Indiana 47401.

## ***How To Become Eligible To Sell To The City of Bloomington Utilities***

### **Section A – Registration Procedures**

All vendors who are interested in doing business with the City of Bloomington Utilities must register with the Purchasing Department. A vendor may register by submitting a completed Vendor Registration Form (Appendix A). The form may be downloaded from [www.bloomington.in.gov/utilities](http://www.bloomington.in.gov/utilities) or available upon request to (812) 349-3670. Once registration is complete, a vendor remains on the list unless removed under the conditions outlined in Section C below, “Removal from the Bid List”.

### **Section B – Vendor Mailing List**

Upon receipt and approval of Vendor Registration Form, the vendor will be assigned a vendor number. The vendor number is then placed on the vendor’s mailing list with an indication of the type of items or services they can provide. The vendor mailing list is consulted when a commodity or service is sought. For formal bids, all registered vendors marketing the needed commodity or service are solicited. For informal bids (quotes), three (3) vendors are selected from the vendor list and solicitations are sent. If there is a large number of registered vendors for a particular commodity, solicitation may be executed on a rotational basis for informal bids.

## **Section C – Removal from the Bid List**

Vendors may be removed from the bidder's mailing list when they indicate a lack of interest in responding to solicitations, for failure to perform in accordance with contract provisions, or by submitting a written request to be removed. The CBU Purchasing Department may remove a vendor from the bidder's list for specific unsatisfactory performance or upon failure to respond to three (3) successive invitations to bid or quote.

# ***The Procurement Process***

## **Section A – Requisitions**

A requisition is a formal request for supplies, equipment, or services. A purchase requisition is a form used by personnel at CBU treatment plants, maintenance crews, and by office staff requesting that the purchasing department solicit goods or services. This form must be used to instigate all CBU procurement activity.

## **Section B – Request for Proposal (RFP)**

A Request for Proposal is an invitation by CBU to submit a proposal to solve a problem or provide a service. The RFP is used generally when precise specifications cannot be developed or are not appropriate.

## **Section C – Request for Quote (RFQ)**

A Request for Quote is an invitation to prospective suppliers for their quotation on specifically defined good and services.

## **Section D – How Bids Are Solicited**

Bids may be solicited through the distribution of formal and informal bid requests. Formal bids are solicitations for goods or services estimated to meet or exceed \$75,000 in cost on an annual basis. In most instances, Informal bids (quotes) are solicitations for goods and services estimated to cost less than \$75,000.

Formal bid requirements will be solicited by a RFP or RFB, and may be advertised in a local newspaper at least one week prior to the final due date of bid submission. The advertisement will state the due date of bid submissions, as well as the general nature of the goods or services to be purchased, where bid forms and specifications may be obtained, and the time and place for the opening of the bid. In addition, solicitations will be mailed to all registered bidders on the CBU bidders list who supply the specific commodity or service. The formal bid process can generally take three to four (3-4) weeks. After bids are opened, the evaluation process may take up to ninety (90) days before an award is made.

Informal bid requirements will be solicited by; Open Market Purchases, telephone quotations, or Requests for Quotation (RFQ). Solicitations will be made from a minimum of three (3) registered bidders from the CBU bidders list. These informal bids do not require public advertising. Generally the informal bid process from distribution to opening of quotes takes from five (5) days to two (2) weeks. After quotes are opened, the evaluation process may take up to thirty (30) days before an award is made.

Except for small purchases of less than \$500, all bidding is done by the City of Bloomington Utilities Purchasing Department, or a designated representative who may be assisted by buyers.

## **Section E – Information Contained in the Bid Request**

Bid Requests will contain a complete description of the commodities or services sought, and other requirements of the City of Bloomington Utilities and the State of Indiana that must be met by the bidder. They will also contain the location, date and time of the bid opening. Questions in reference to bids should be directed to the Buyer indicated on the bid or quote request cover sheet.

## **Section F – Completing the Bid Forms**

When submitting formal bids, bidders must show on the bid form the net unit and total price for each item for which bids are submitted. All sections of this bid form must be completed in full. Along with the completed bid form, a copy of the invitation cover sheet, and a copy of the specifications each bearing the corporate seal or the signature of an officer or principle of the firm should be returned.

When completing the Request for Quotation (RFQ), the vendor should be sure to complete all of the necessary information on the form, including the columns headed “unit price” and “extension”. Be sure to check all specifications carefully. The bidder should return, with the RFQ form, a copy of the specifications bearing the corporate seal or the signature of an officer or principal of the firm. Return the completed RFQ prior to the due date to the CBU Purchasing.

## **Section G – Changes and Withdrawals**

Under no circumstances are changes in bids allowed.

### **A. Withdrawals PRIOR to bid opening**

A written request for the withdrawal of a bid or any part thereof may be granted if the request is received by the CBU Purchasing Office prior to the specified time of opening. The written request must give the specifics of the error in the bid.

### **B. Withdrawals AFTER bid opening**

Withdrawal of bids is not allowed after the time bid opening procedure has commenced.

## **Section H – The Time of the Bid Opening**

Bids are date and time stamped upon receipt in the CBU Purchasing Office to indicate the official date and time the bid arrived. Formal bids are opened during regularly scheduled public meetings or business hours. Informal quotations are opened on regularly scheduled work days. If a bid opening is inadvertently scheduled on a holiday or weekend, it will be delayed until the following work day at the same hour. All bids and quotes will be opened at the scheduled time indicated on the bid or quote request. It is imperative that the vendor respond to bids/quotes by the TIME and DATE indicated on the request. Failure to meet the time and date specified will result in an automatic disqualification of the bid/quote.

## **Section I – The Bid Opening**

After the sealed envelopes containing the vendor's bid submissions have been date and time stamped, they will be placed in a designated safe or file until the time specified for opening. The opening and tabulation of bids will be under the control of the CBU Purchasing Department or a designated representative. All informal bid (quote) results will be filed with the Purchase Order awarded to the winning quote.

Bidders are not required to attend bid openings, but are encouraged to do so. After formal bids are opened and reviewed, a tabulation of bids will be prepared and made available to each vendor who submitted a bid.

## **Section J – Alternate/Equal Bids**

When the specifications describe an article or material defined by brand name, the name and catalog number of a particular manufacturer or vendor, the term "OR EQUAL" is implied. Any reference to a particular manufacturer's product either brand name or limited description is only for purposes of setting a standard of performance, quality, composition, construction, or size. If there is any deviation in the pack, source, quality, etc., of an item bid from that prescribed in the specifications, the appropriate line in the specifications should be marked out and the substitution clearly indicated. If a particular brand name product is required with no substitutions, it will be stated in the specifications.

## **Section K – Delivery Time**

Delivery time must be stated IN DAYS in the appropriate spaces of the Price Schedule and/or cover sheet. Indefinite terms such as *promptly*, *without delay*, etc., will not be given consideration. Failure to indicate the delivery time shall be just cause for REJECTION OF THE BID.

## **Section L – Waive of Competitive Bid**

While the CBU prefers a competitive bid process to acquire goods and services exceeding \$25,000 in cases when deemed appropriate, a Bid Waiver or a Sole Source process may be used.

## **Section M – Rejection of Bids**

The CBU Purchasing Department has the authority to reject bids if, in its opinion, doing so is in the best interest of the City of Bloomington Utilities. Bid rejection may be based on late submission of bids, unreasonable prices, or failure to meet quality, delivery time, or other specification requirements.

## **Section N – Information Prior to Award**

A pre-bid conference may be required for selected bids. When required, it will be included in the RFP/RFB. A bidder may request to review bids, only after the bid opening has taken place. A tabulation of bids will be posted at the CBU Purchasing Office.

## **Section O – Splitting Bids**

The CBU Purchasing Department has the right to make an award on an aggregate or individual item basis, according to the best interests of the City of Bloomington Utilities. If the bidder so desires, he may bid on items in the aggregate but is required to name a unit price on each item included in the bid.

## **Section P - Ownership**

The City of Bloomington Utilities Department shall retain sole ownership of all purchases, including drawing, blue-prints, photographs, plans & specification, computer generated data, and all other documents of any kind. The City of Bloomington Utilities reserves the right to use any item purchased in any way it deems appropriate.

# ***The Award Process***

## **Section A – Basis of Award**

An award will be made to the lowest responsive and responsible bidder complying with all provisions of the bid invitation. The Purchasing Department has the right to reject any or all bids and to waive any informality in bids received whenever the rejection or waivers in the interest of CBU. The Purchasing Department further has the authority to reject a bid if the bidder has previously failed to perform adequately or complete contracts of a similar nature in the past.

## **Section B – Price Adjustments**

Prices shall remain constant for the duration of the contract, unless it is otherwise indicated in the “Special Provisions” of the contract agreement.

## **Section C – Non-Product Factors of Bid Award**

### ***Affirmative Action Requirements***

Bidders for contracts of \$10,000 or greater must have an approved Affirmative Action plan on file with the City of Bloomington Legal Department. This plan must be submitted and approved before a bid's due date in order for a proposal to be considered. More detailed information including submittal information and contact numbers will be available in bid documents.

### ***Living Wage Ordinance***

On January 1<sup>st</sup>, 2006 the City of Bloomington implemented a Bloomington Living Wage Ordinance to ensure that the city, city service contractors and subcontractors, and beneficiaries of a city grant, tax abatement or other forms of subsidy or assistance pay a wage sufficient for a working family to meet basic needs in housing, child care, food, clothing, household items, transportation, health care, and taxes. This ordinance is applicable on certain service contracts \$10,000 or higher. More detailed information including submittal information and contact numbers will be available in bid documents. Additional information is available at [www.bloomington.in.gov](http://www.bloomington.in.gov).

### ***Insurance Requirements***

Certain contracts may require that *certificates of insurance* be submitted before work may commence. Any such requirements will be noted on the Request of Bid or Request for Proposal.

## ***Invoicing and Payment***

### **Section A – Invoicing**

An invoice is a statement of charges submitted for goods or services received. The contractor is required to submit an invoice with each shipment. A Summary Invoice should be submitted once each month for goods or services rendered for Blanket Purchase Orders. This summary should list the sales/delivery ticket numbers, which cover the deliveries made during the monthly billing period. One copy of each signed sales/delivery ticket must accompany the invoice. Invoices must contain the applicable Purchase Order number and the CBU department which received the items.

Unless it is otherwise indicated, invoices should be submitted in DUPLICATE for each purchase order. The invoice should be submitted immediately upon completion of shipment or services. The properly receipted original Bill of Lading must be attached to the invoice if shipment is made by freight or express.

It should also be noted that City of Bloomington Utilities is tax exempt and no sales tax will be paid on submitted invoices. Tax Exempt Documents are available upon request to (812) 349-3670.

## Section B - Payments

Payments will be made only after:

1. All provisions of the contract have been met and completed.
2. An appropriate invoice (not an account statement) has been received by the CBU Accounts Payable Department.
3. Utility Service Board bi-weekly approval.

## Section C – Partial Payments

Partial payments are not generally made except for progress payments in public construction contracts. If it has been indicated in the contract that partial payments will be made, such payments will be released to the vendor upon acceptance of materials or services and upon receipt of an invoice in accordance with the contract completion date.

## Section D – Payment Schedule

A schedule showing when invoices are due and when checks will be issued is available upon request or from [www.bloomington.in.gov/utilities](http://www.bloomington.in.gov/utilities). Please refer to this schedule for information regarding timing of your billings and when payment will be issued. Any questions regarding the scheduling of payments should be addressed to the Accounts Payable Department, (812)349-3673.

# ***Sale of Surplus Property***

## Section A – When Property Becomes Surplus

Surplus property is tangible property which is no longer of use to any City of Bloomington department. Items generally classified as surplus have been determined by CBU to be obsolete, uneconomical to repair, or valued only for their base contents. The Bloomington Utilities Service Board has the sole authority to declare surplus property.

## Section B – How Surplus Property is Disposed

Surplus property is disposed of in the following ways:

***Public Auction*** – Auctions are held approximately once each year in the summer, primarily for the disposal of City of Bloomington vehicles and miscellaneous office equipment.

***Sealed Bid Sales and Fixed Price Sales*** – Sealed bid sales are conducted as needed, and consist of individual and lot items which may be viewed at the CBU Service Center. Bids may be submitted for one up to all items available. Sealed bid items are sold to the highest bidder. Fixed price items are sold at an established price.

*Salvage Disposal* – Items determined to be of value for their base content only are sold in this manner.

Public Auction and Sealed Bid Sales are advertised in newspapers which have a distribution throughout the City of Bloomington. All items are sold in “as is, where is” condition, with the purchaser responsible for removal. For additional information, contact the CBU Purchasing Department, (812) 349-3677.

## ***Frequently Asked Questions***

### **1. May a vendor see copies of bids prior to award?**

A vendor may review copies of bids prior to an award, but after the bid opening, in the office of the Purchasing Department by appointment only.

### **2. What are the most frequently considered factors involved in determining a responsive bid and a responsible bidder?**

A “responsive bid” is a bid which meets all the terms, conditions, and specifications of the RFB. A “responsible bidder” indicates that a contractor or supplier has financial resources, personnel, facilities, integrity, and overall capability to complete a particular CBU contract or commodity requirement successfully.

### **3. Can a stipulation of “all or none” on behalf of the vendor for its materials lead to disqualification of a bid?**

If it is in the best interest of CBU to accept the “all or none” stipulation, the bid may be accepted for evaluation. However, if CBU determines that the “all or none” stipulation is not in its best interest, the bid may be disqualified by the Purchasing Department.

### **4. Are unsuccessful bidders notified?**

Unsuccessful bidders will be notified by mail, fax or email; a bid tabulation will be included in the mailing.

### **5. What is done in the events of tie bids?**

If time permits, and it is in the best interest of CBU to do so, a Re-Bid may occur. Otherwise, the award will be made on the basis of non-price factors such as facilities, financial resources, personnel, proximity to Bloomington etc. In some cases, the prior year vendor will be awarded the bid if continuity is in the best interest of the City of Bloomington Utility Department.

### **6. May a vendor call and ask to review the contract file and request information about and award?**

Vendors may request to review files and schedule an appointment with the Purchasing Manager at (812) 349-3677.

**7. Who manages surplus property?**

Surplus property is managed by the CBU Purchasing Department. This department, along with the City of Bloomington Department of Fleet Maintenance, schedules auctions, spot-sales, or competitive bidding for surplus property.

**8. What should I do first if I wish to bid on City of Bloomington Utilities business?**

Contact the CBU Purchasing Department and request a “Vendor Registration” form. Completing and returning the form will guarantee placement on the bidder’s mailing list. Bids currently issued but not opened will be sent to those requesting it.

**9. What happens if I can only bid on part of the items on an RFB?**

You should bid on only those items you can provide. The Purchasing Department has the option to decide, after bid evaluation, whether a bid-in-part will be awarded on an individual item basis.

**10. How can I get my product approved?**

Product approval or evaluation is normally done after bids are received and opened. However, in some instances, CBU will evaluate certain products and establish a qualified products list. When this is the case, products can be submitted for evaluation at any time.

**11. May I bid if I don’t handle the brand listed on the RFQ?**

If the bid specifies “Or Equal”, you may offer an alternative brand. “Or Equal” products will be evaluated after bids are received, based on literature submitted and any required testing of the product.

**12. Who can I contact if I have additional questions, need more information, or would like to make an appointment?**

Julie Martindale – Purchasing Manager C.P.M. at (812) 349-3677 or email at [martindj@bloomington.in.gov](mailto:martindj@bloomington.in.gov).

Appendix A



**City of Bloomington Utilities Vendor Registration Form**

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Company Name \_\_\_\_\_

Contact Name \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_

Company's Web Site(s): \_\_\_\_\_

Federal Tax ID Number \_\_\_\_\_

Name of SSN Owner \_\_\_\_\_

Organization Type: Sole Owner  Corporation  LLC Corp.

State of Corporation? \_\_\_\_\_ Nonprofit? Yes No

Domestic/Foreign Owned? \_\_\_\_\_

Is your company owned by a parent company? Yes No

Parent Company Name \_\_\_\_\_

Parent Company Address \_\_\_\_\_

Parent Company Tax ID \_\_\_\_\_

Are you: Small Business?  Minority - Owned Business?  Veteran - Owned Business?

Women - Owned Business?  Veteran Disabled - Owned Business?

Certifications: 8a Certified?  Minority?  Women-Owned?

Does your company accept credit cards? Yes No

Products/Services (short narrative): \_\_\_\_\_

\_\_\_\_\_

Please remit this form to: **City of Bloomington Utilities  
Purchasing Dept.  
PO Box 1216  
Bloomington, IN 47402-1216**

*If you have any questions please contact the Purchasing Department at 812-349-3670*