SF Small Business Summit

FINDING OPPORTUNITIES AND BIDDING ON THE SF CITY PARTNER WEBSITE

OFFICE OF THE CONTROLLER

SF CITY PARTNER

Finding Opportunities and Bidding on the SF City Partner Website

Tuesday, October 5, 2021

CITY & COUNTY OF SAN FRANCISCO
Office of the Controller
Systems Division

Introductions

Julie Ansell
Director of Procurement
Controller's Office, Systems Division

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Strategic Sourcing and Suppliers Team Functional Lead
Controller's Office, Systems Division

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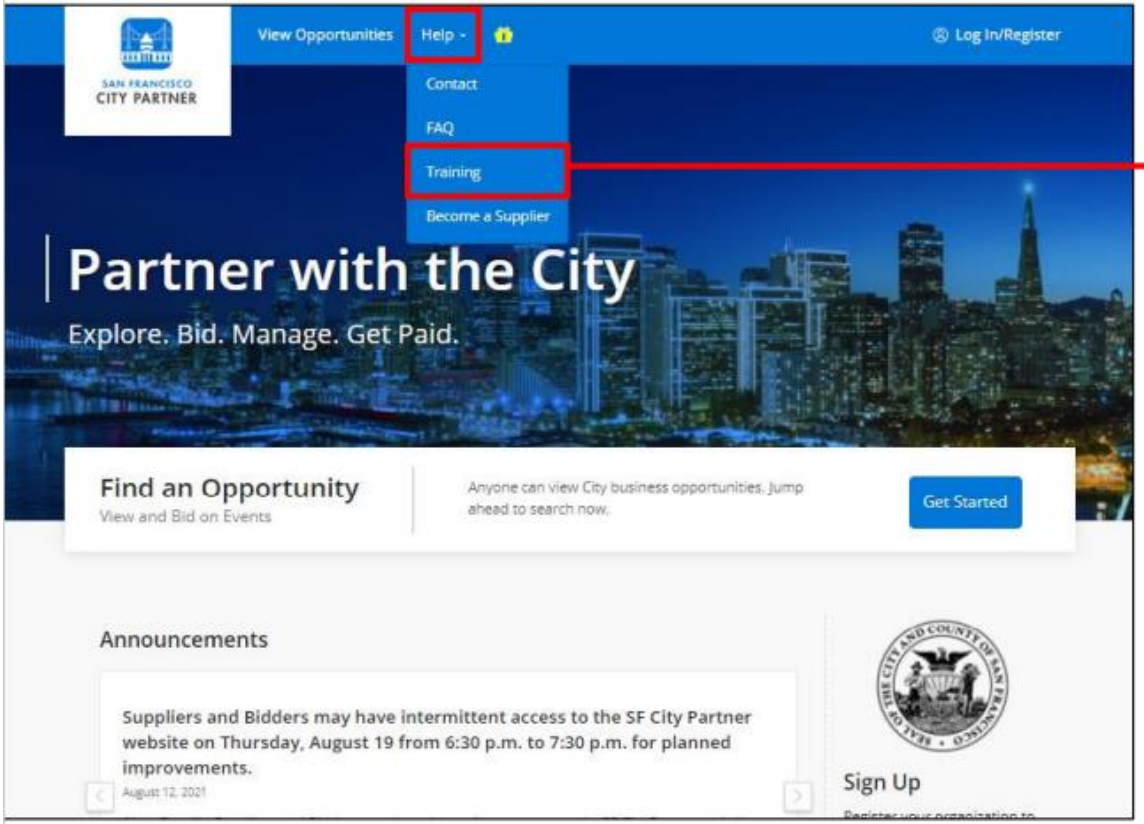
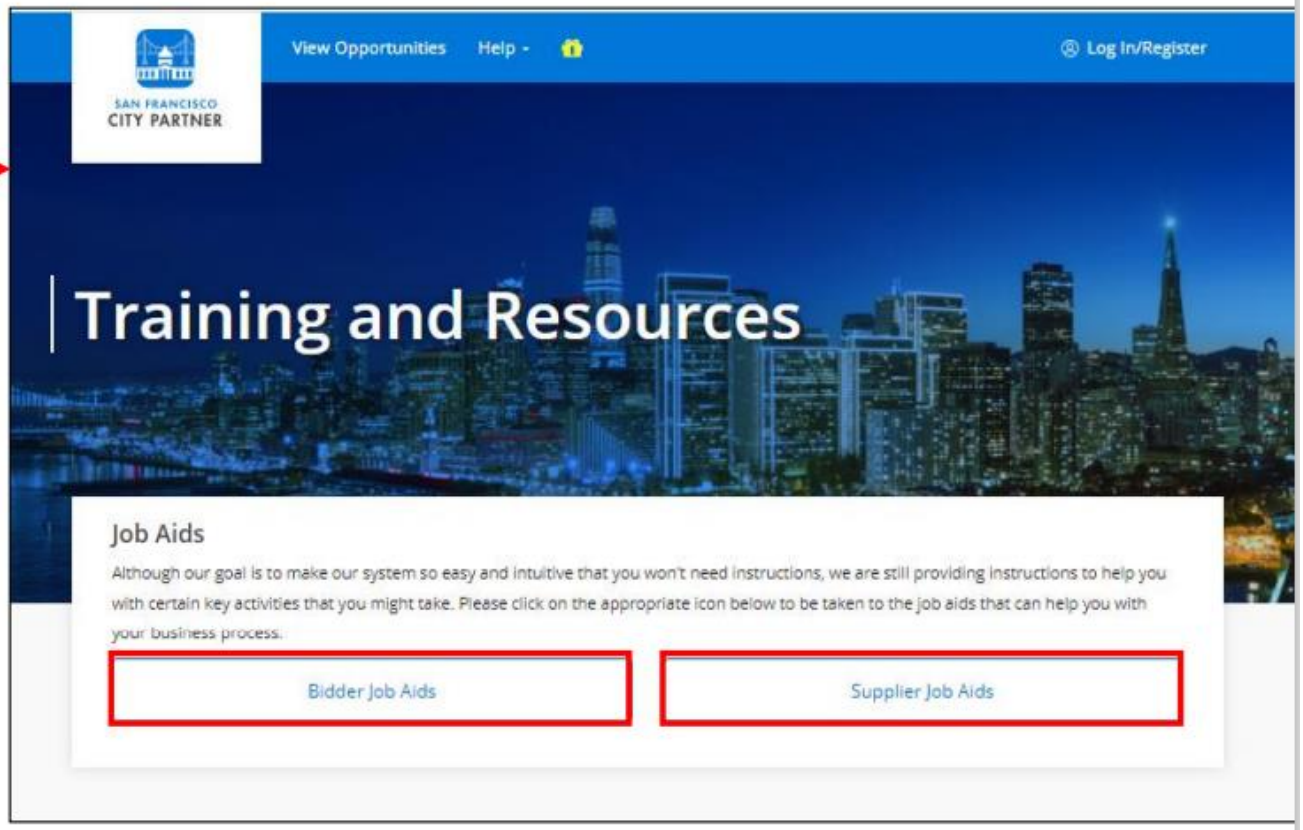
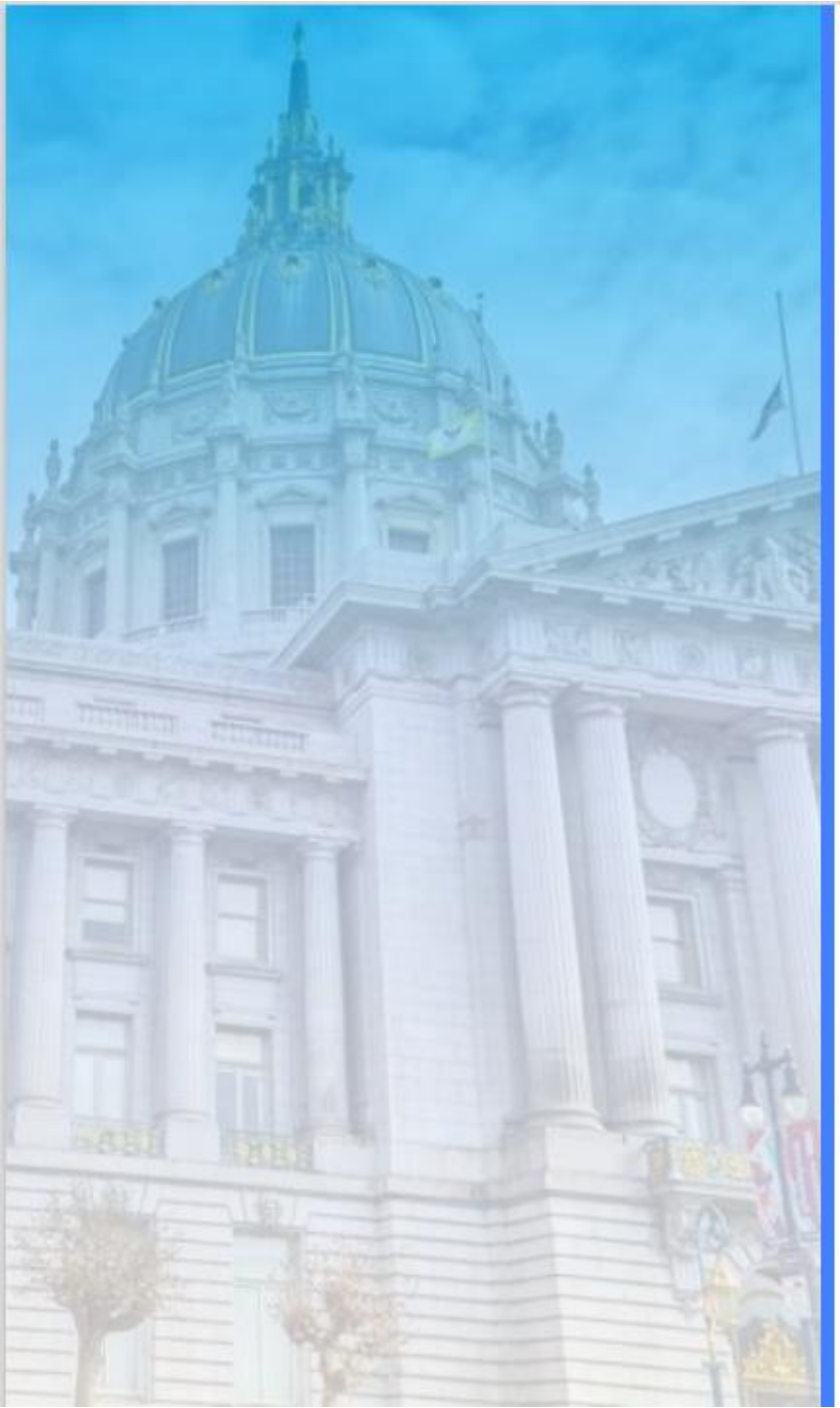
Strategic Sourcing and Suppliers
Controller's Office, Systems Division

There Are Job Aids to Help Walk You Through This Process

Finding the "Viewing and Bidding on City Business" Job Aids







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How to Search for Bid Opportunities

- Searching for Public Events
- Searching for Private Events
- Bid Advertisements vs Sourcing Events
- Entering in a Bid
- Finding Events that You've Already Bid On
- Contact Information

What Are Public Vs Private Events?

Public Events

- A Public Event is one that is posted on the SF City Partner Website for anyone to view, including the General Public.
- Public Events are posted on the main Opportunities page on the SF City Partner Website
- To enter in a Bid, you must be a Bidder or a Supplier in our system.

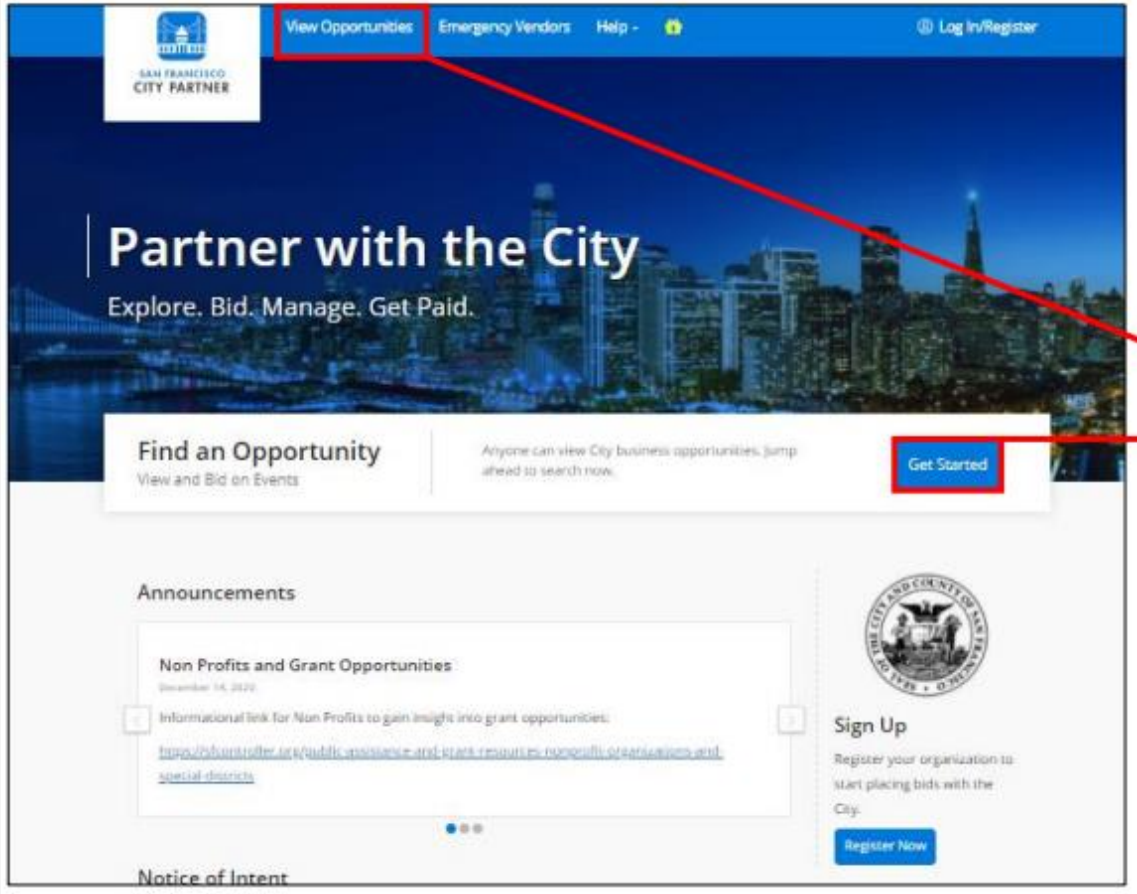
Private Events

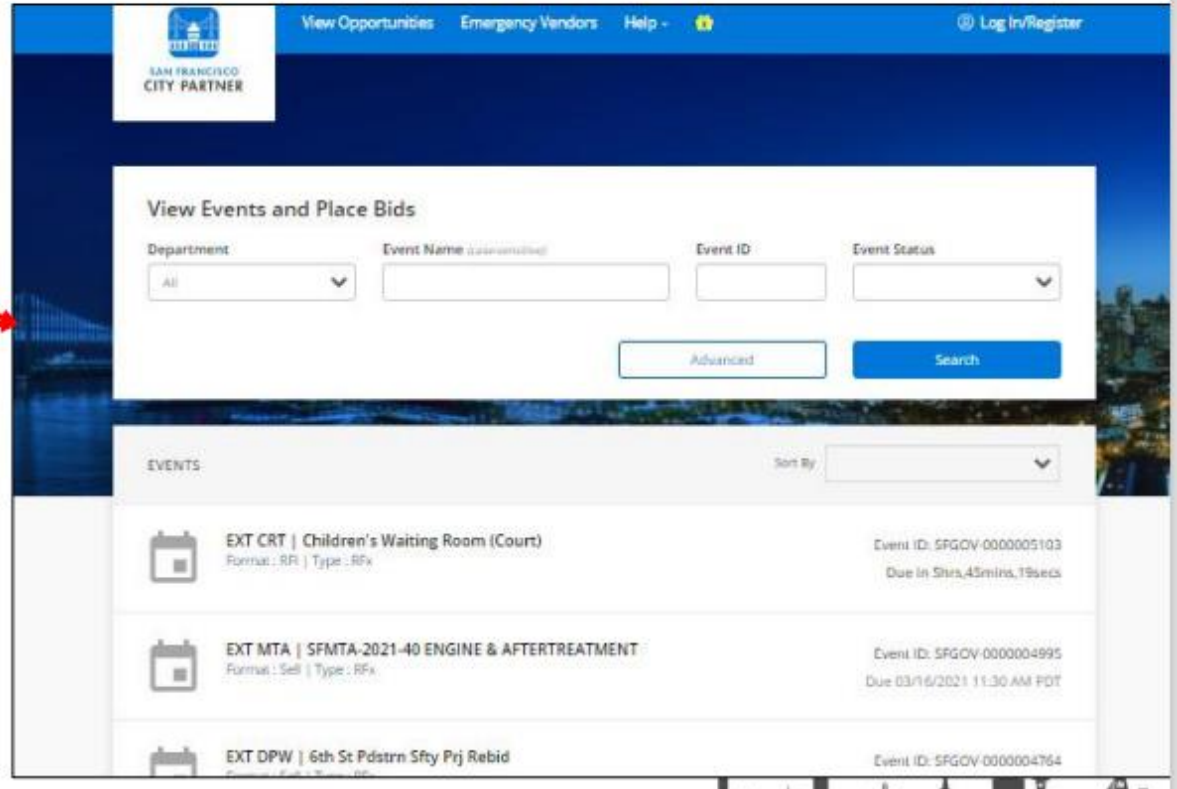
- A Private Event is one where a pre-selected or pre-qualified group of Bidders/Suppliers is asked to view and bid on the Bid Opportunity.
- You must be an invited Bidder/Supplier to view and bid on a Private Event.
- Private Events are posted in a separate area on the SF City Partner Website.

How Can the General Public Find Public Events?

SF CITY PARTNER

Anyone can view Public Events on the SF City Partner website (https://sfcitypartner.sfgov.org/pages/index.aspx) by clicking on the View Opportunities menu item or the Get Started button.

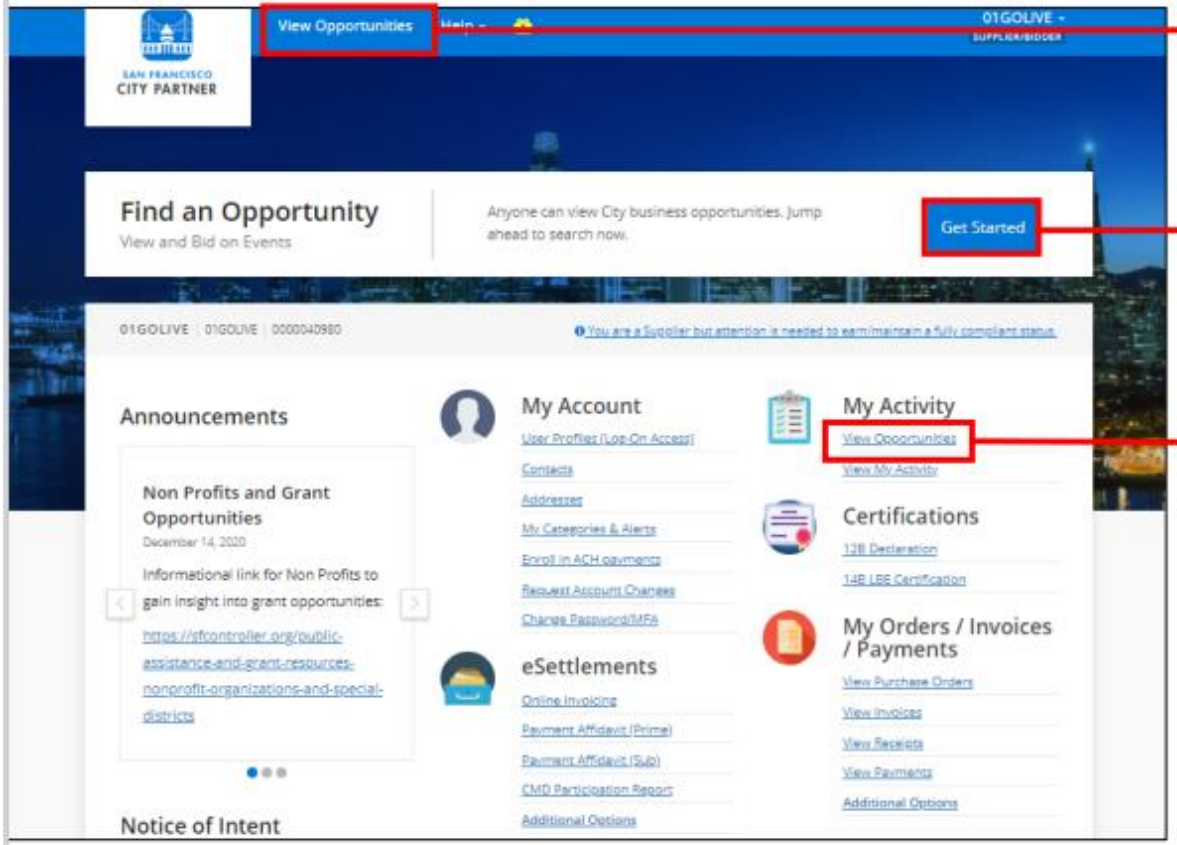


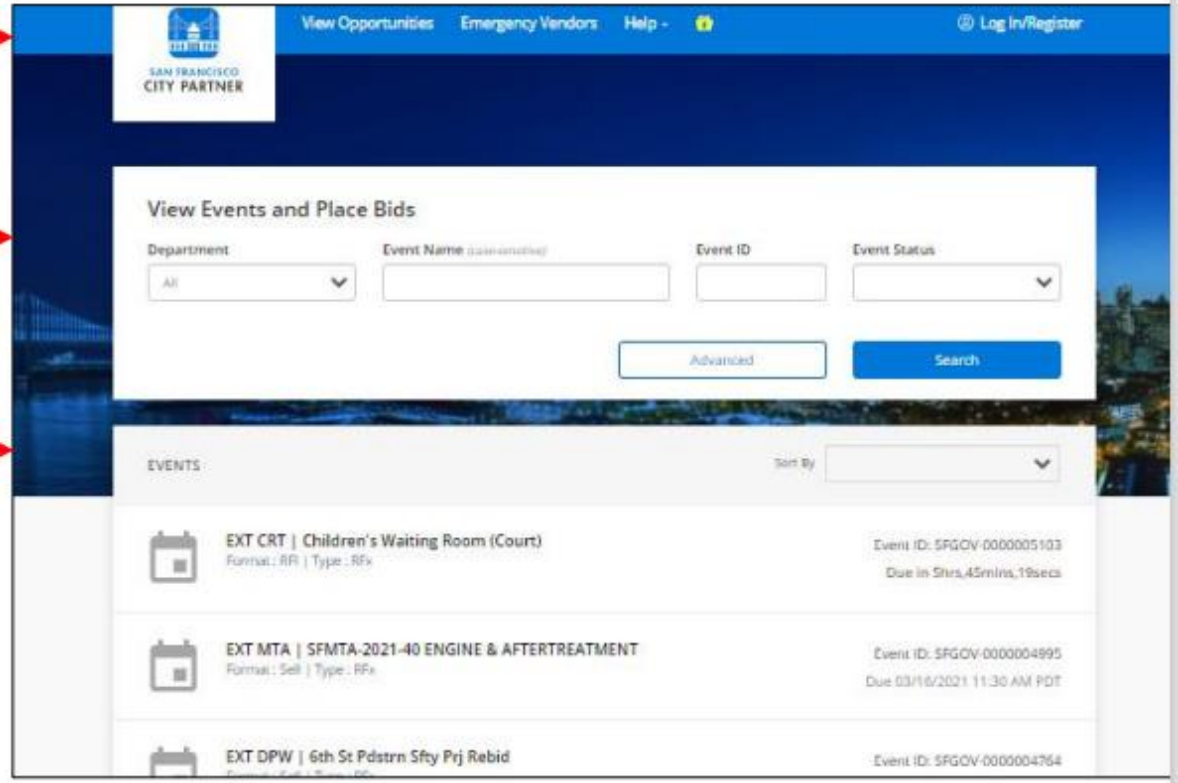


How Can You Find Public Events After Logging In?

SF CITY PARTNER

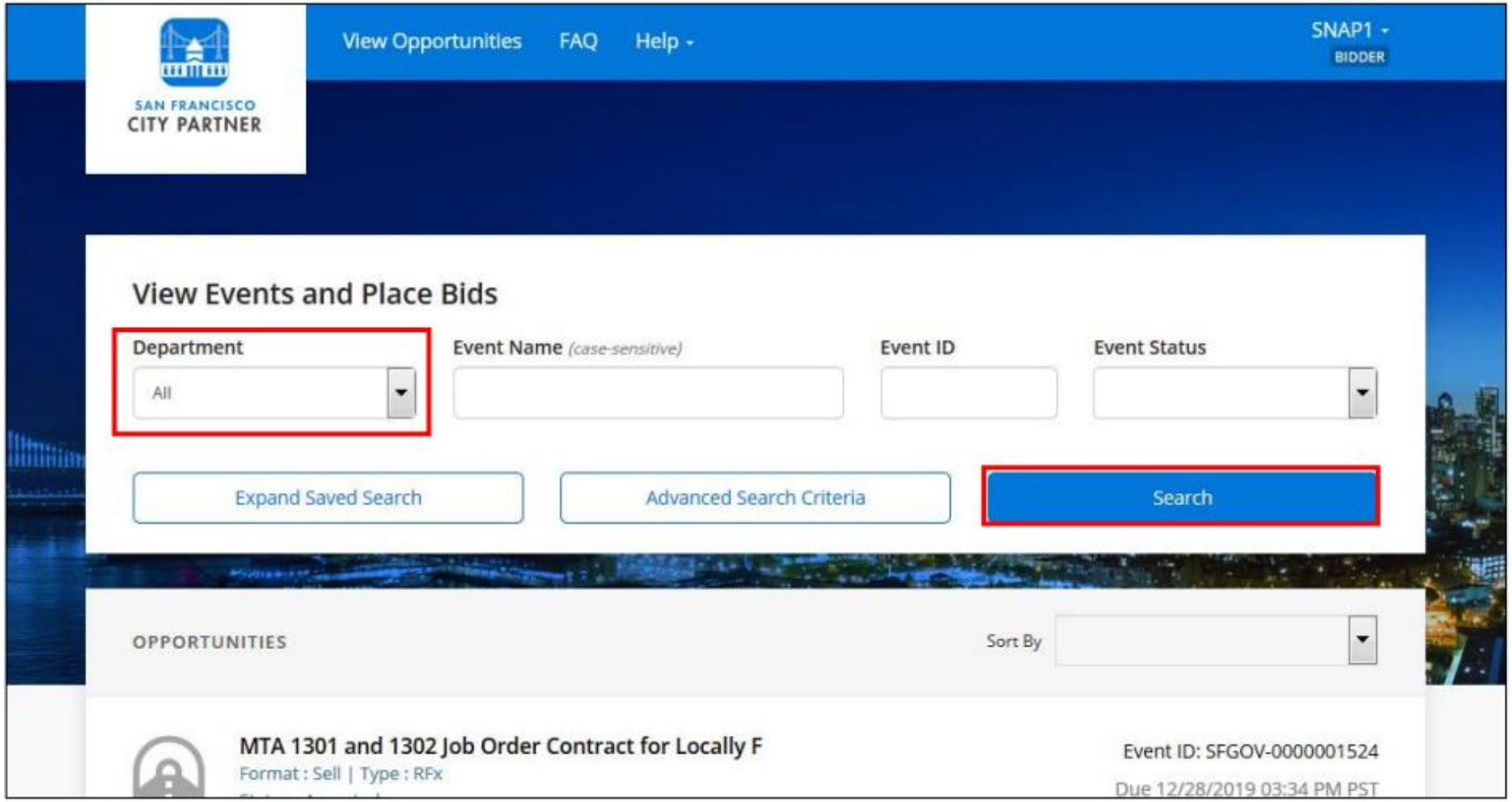
After logging in, Bidders/Suppliers can view Public Events on the SF City Partner website (https://sfcitypartner.sfgov.org/pages/index.aspx) by clicking on the View Opportunities menu item, the Get Started button, or the View Opportunities hyperlink.





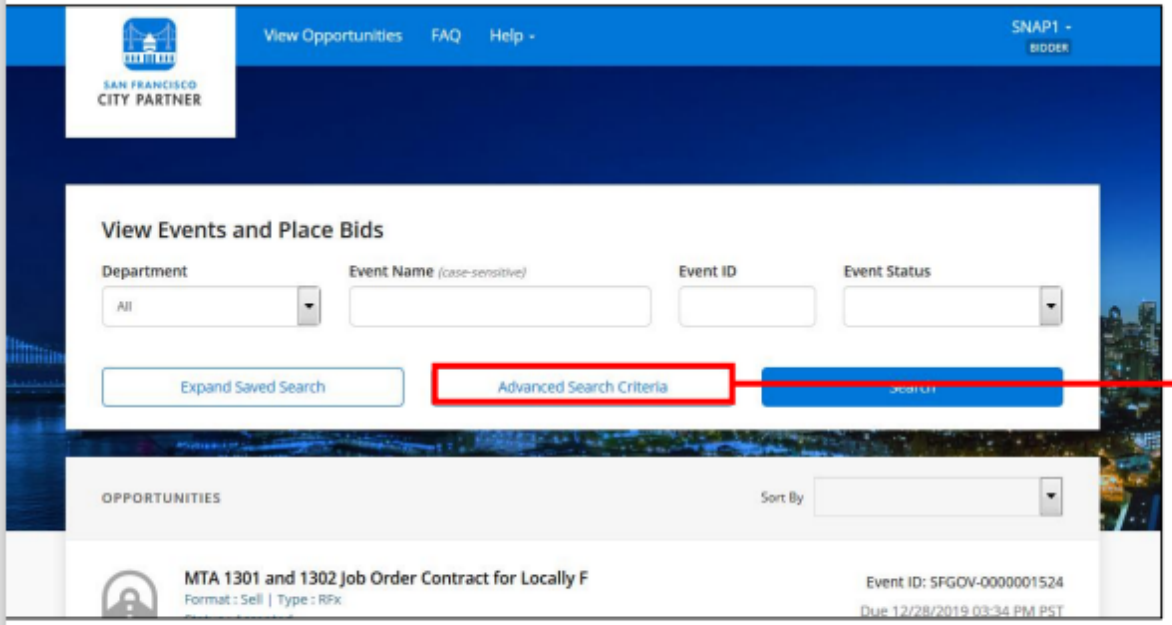
Use Search Criteria to Narrow Your Search

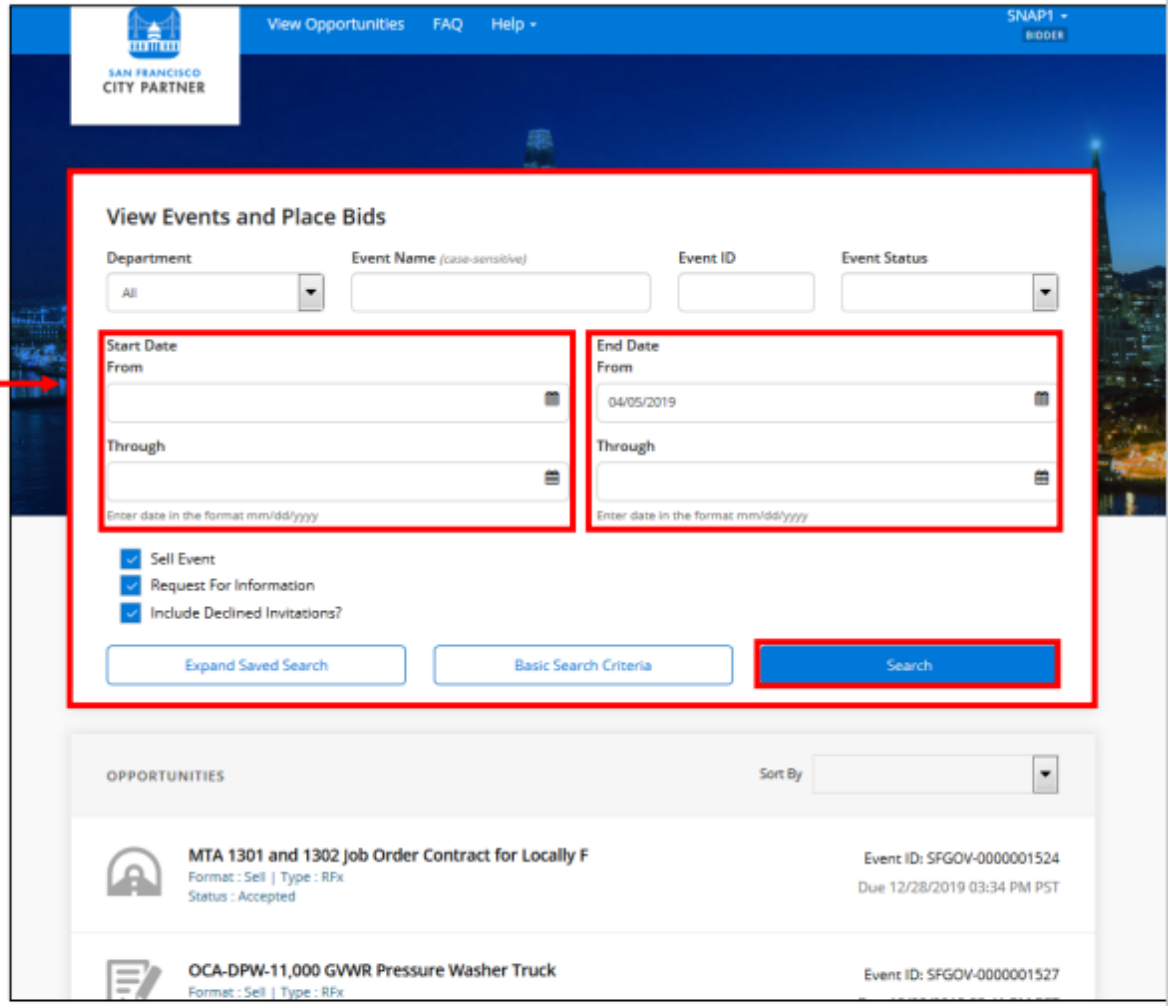
View Bid Opportunities from a Specific Department



Use Search Criteria to Narrow Your Search

Click Advanced Search Criteria to Expand Your Search Options





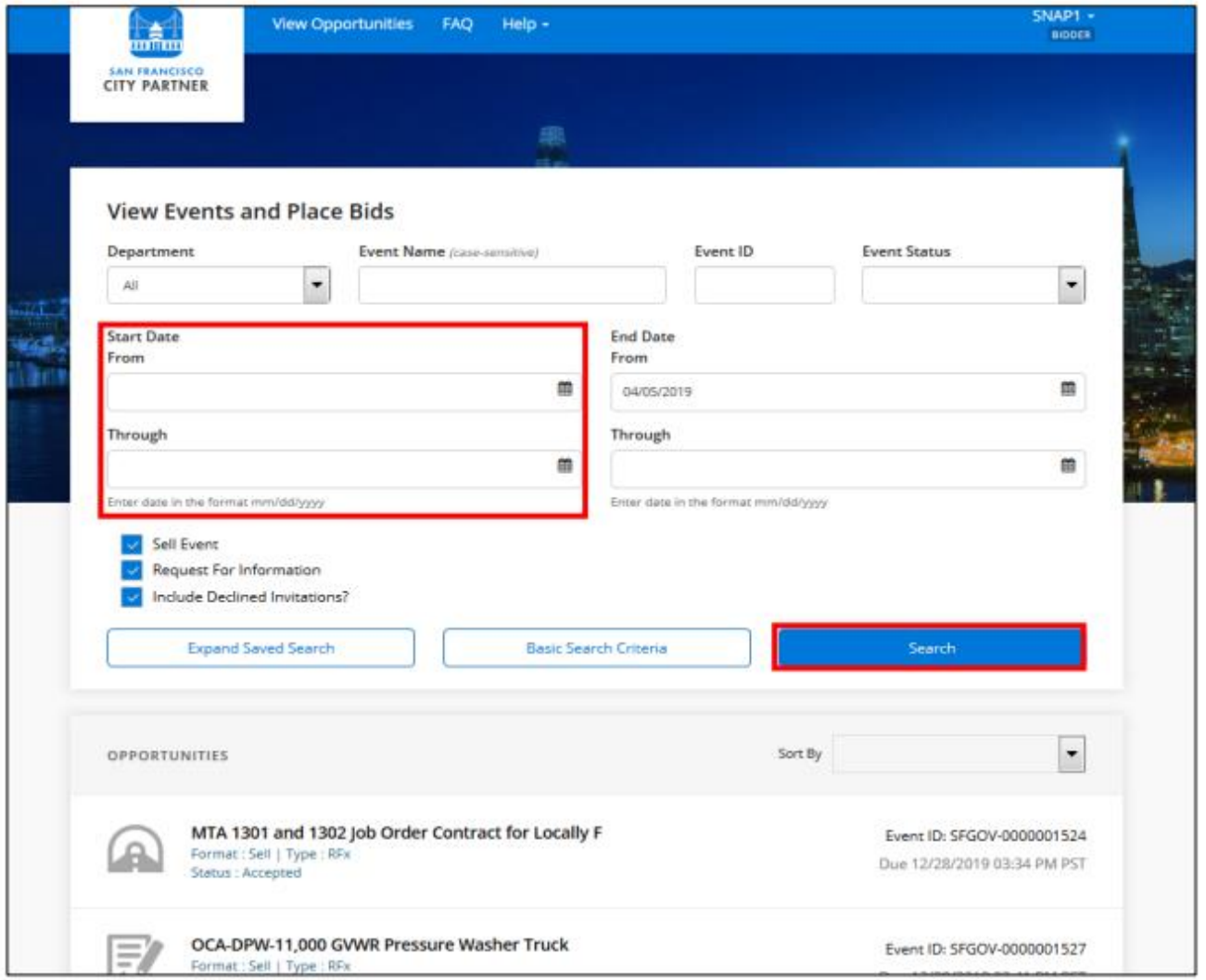
Use Search Criteria to Narrow Your Search

Search by Start Date

The Start Date represents the date when Bidders/Suppliers can start bidding on an event.

If you are consistently looking through the City's bid opportunities, we would recommend using the "From" and "Through" fields here to help you identify new listings.

For example, if you search for City events on a weekly basis, you could use the Start Date fields to search for Public Events that began within the past week.

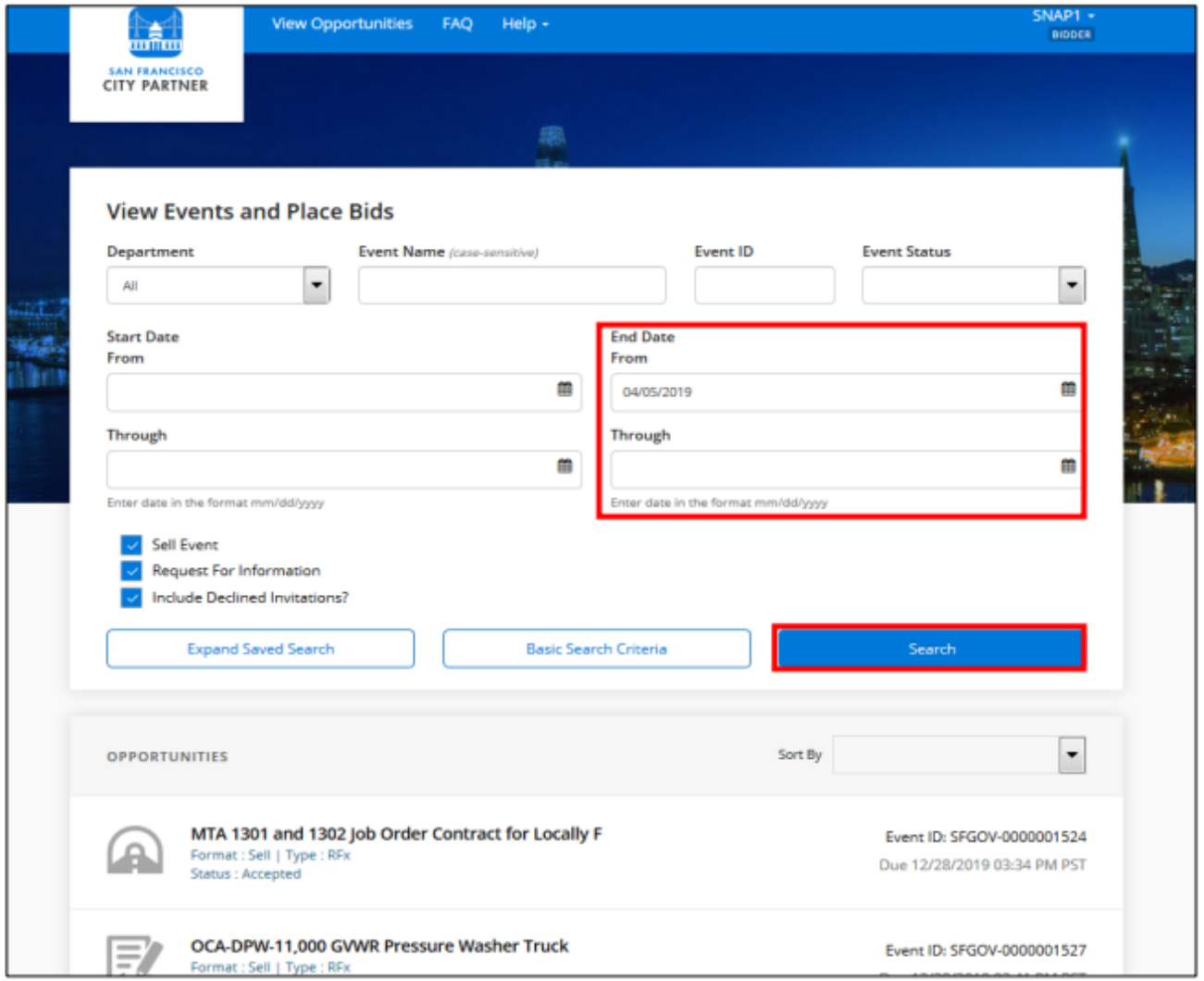


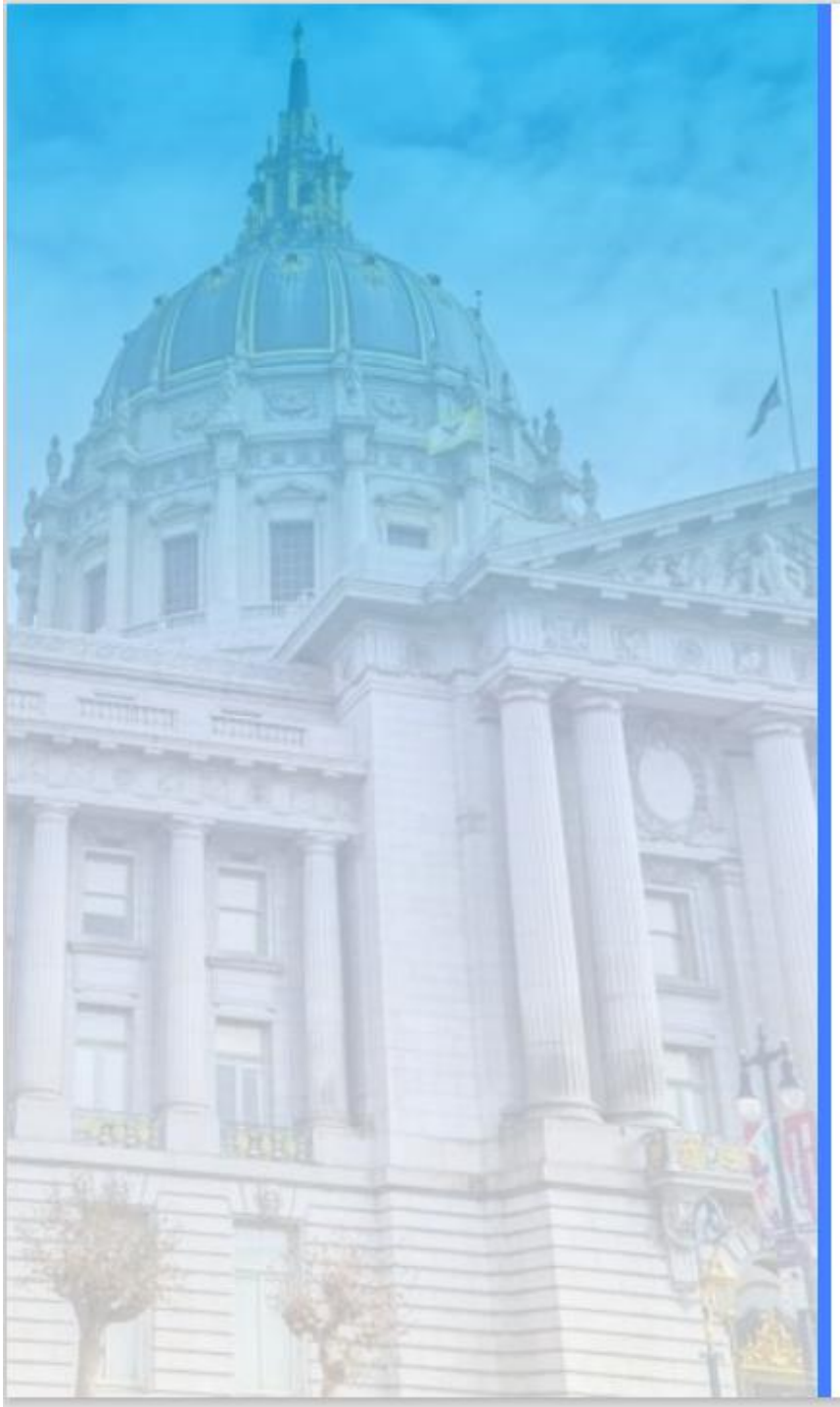
Use Search Criteria to Narrow Your Search

Search by End Date

The End Date represents the date when bidding on the Public Event ends.

Please note that the "From" field for End Date will be pre-populated with today's event. To find information on events that have already ended, you will need to change the "From" and "Through" fields here to bookend a timeframe in the past.





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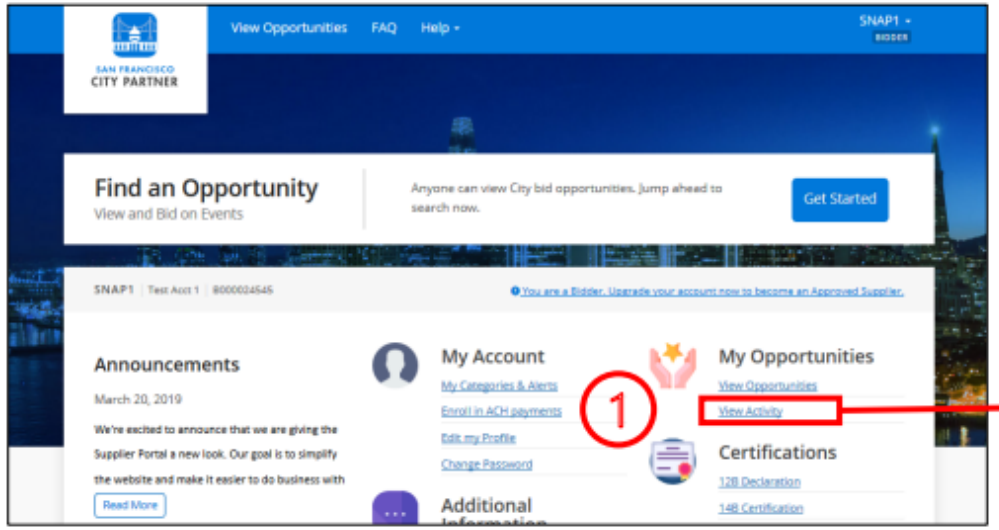
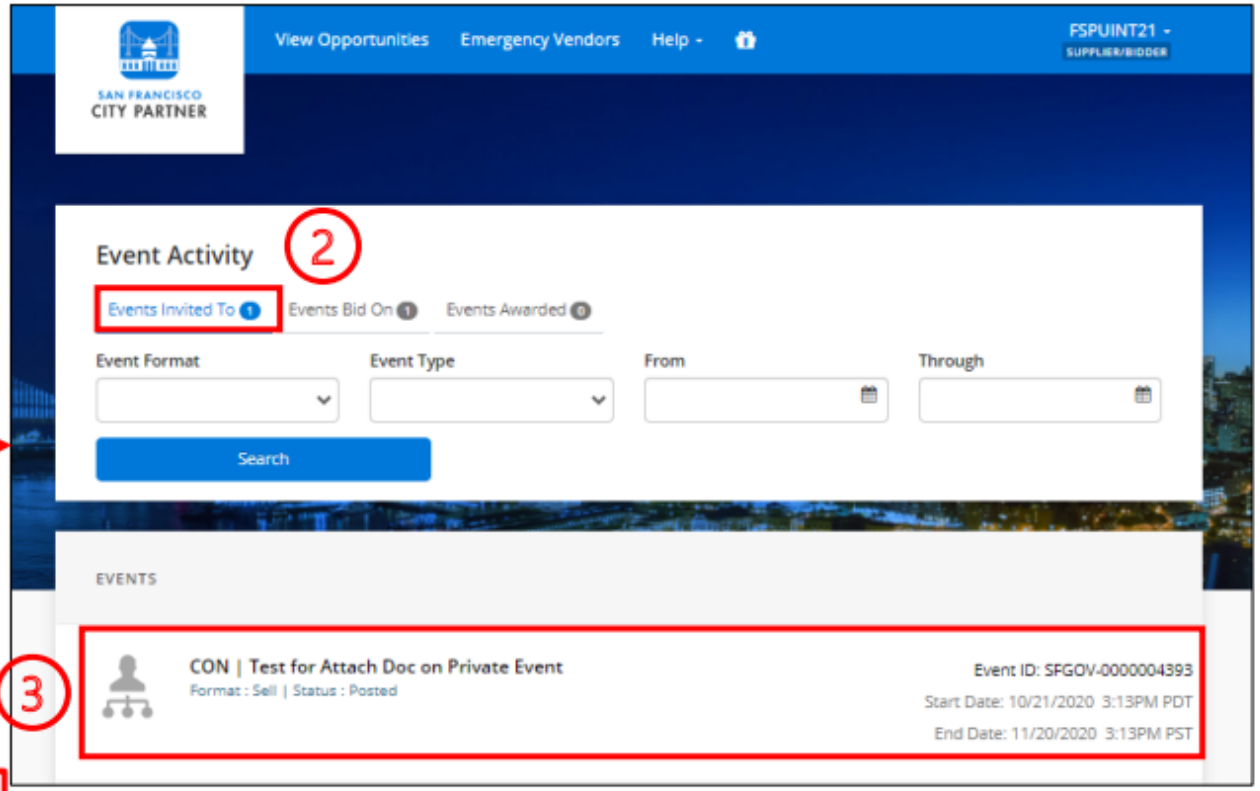
How Can Bidders/Suppliers Find Private Events?

Private Events Are Found Through a Different Pathway

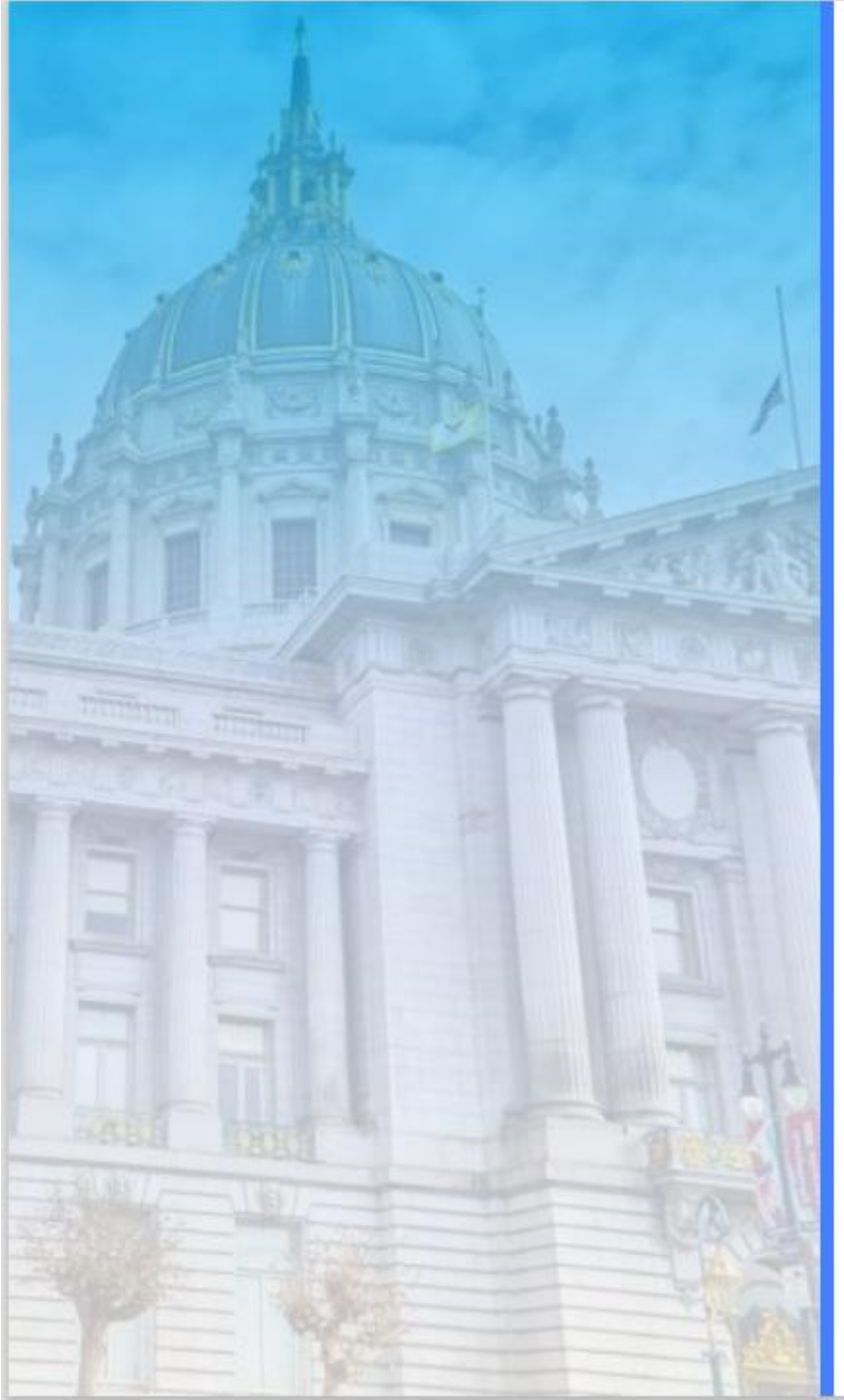
1) To find a Private Event (to which you have been invited), Bidders/Suppliers must first login and click the View Activity link.



2) On the Event Activity page, you then need to click the Events Invited To link.



3) You can then click into the Event to Place a Bid.



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Bid Advertisements vs Sourcing Events

There Are Two Main Types of Bid Opportunities You Will See

Bid Advertisements

- These are advertisements of Bid Opportunities where the Bidder/Supplier will need to submit their bid outside of the SF City Partner website.
- Examples of when this might be used include:
  - A City department has its own sourcing system
  - A City department may post details on a Sourcing Event for a Supplier that is advertising a Trade Package on an existing City Contract.
- The names of Bid Advertisements start with "EXT" followed by the 3-letter code for the department that is posting the event.

Sourcing Events (and Requests for Information)

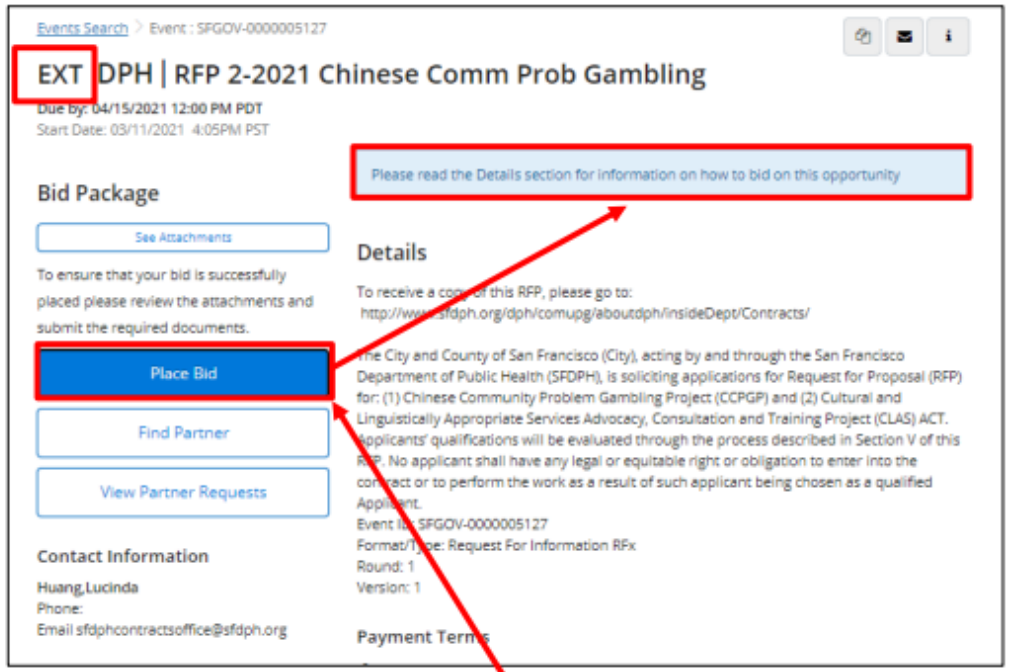
- These are Bid Opportunities where the Bidder/Supplier is expected to enter their bid directly into our system via the SF City Partner website.
- The names of these events begin with the 3-letter code for the department that is posting the event.

Bid Advertisements vs Sourcing Events

The Type of Event Will Determine if You Can Enter a Bid in Our System

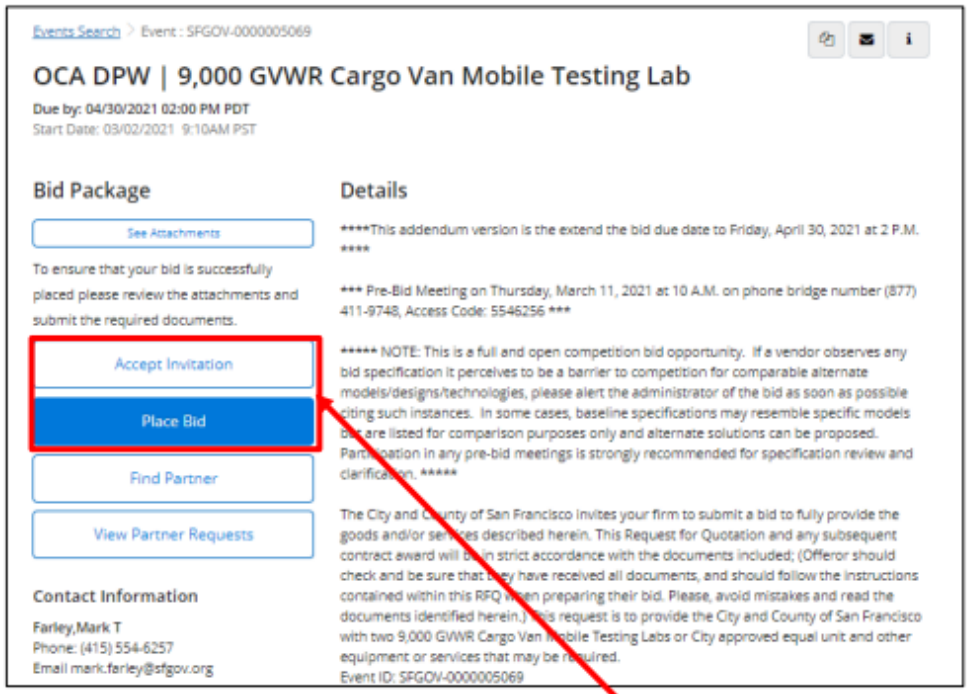
Bid Advertisements

Bids cannot be entered for Bid Advertisements because...
1) the Accept Invitation button will not show and...

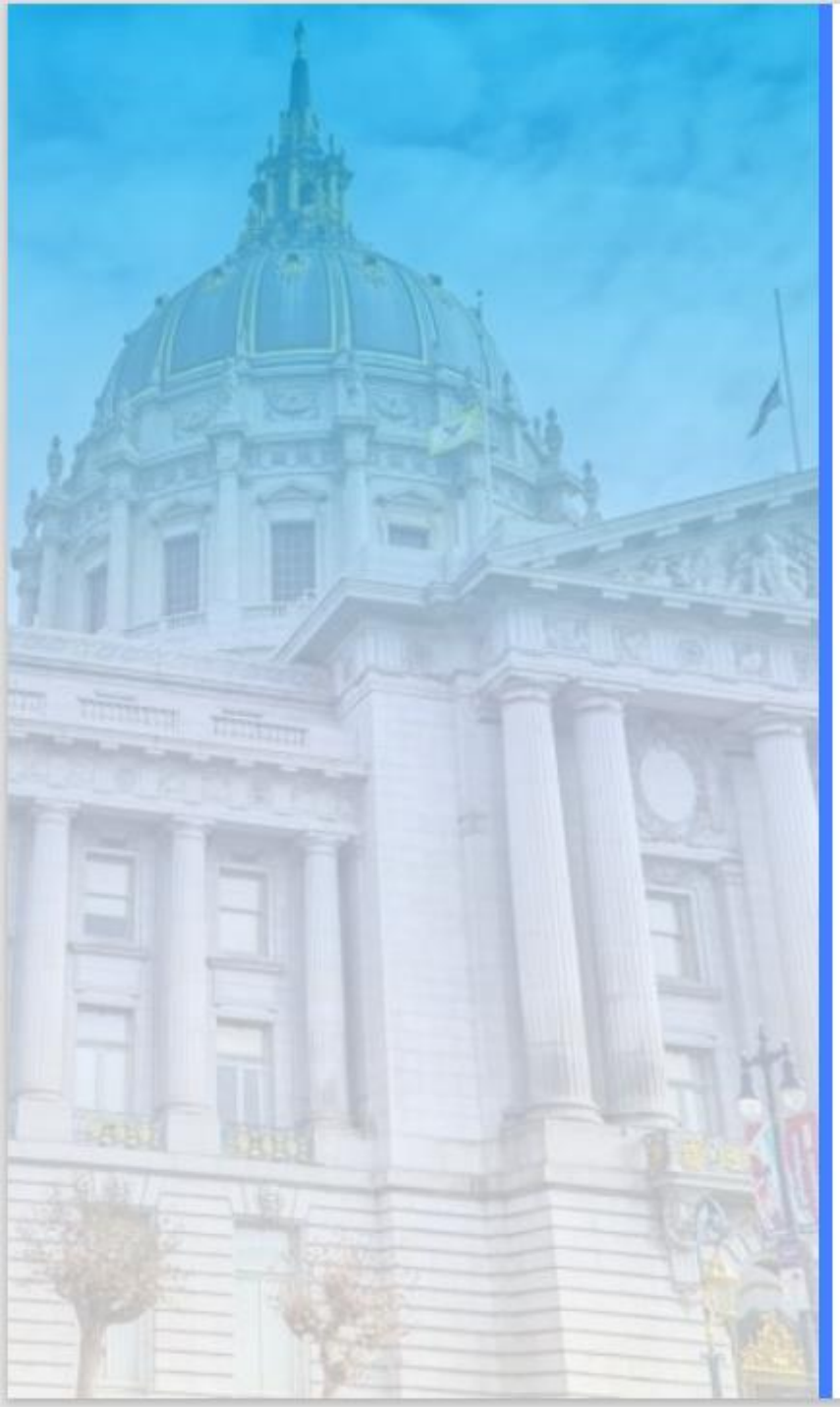


...the Place Bid button will direct you to read the Details section for directions on how to place a bid

Sourcing Events (and Requests for Information)



Sourcing Events and Requests for Information will have active Accept Invitation and Place Bid buttons.



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How Do Bidders/Suppliers Enter in a Bid?

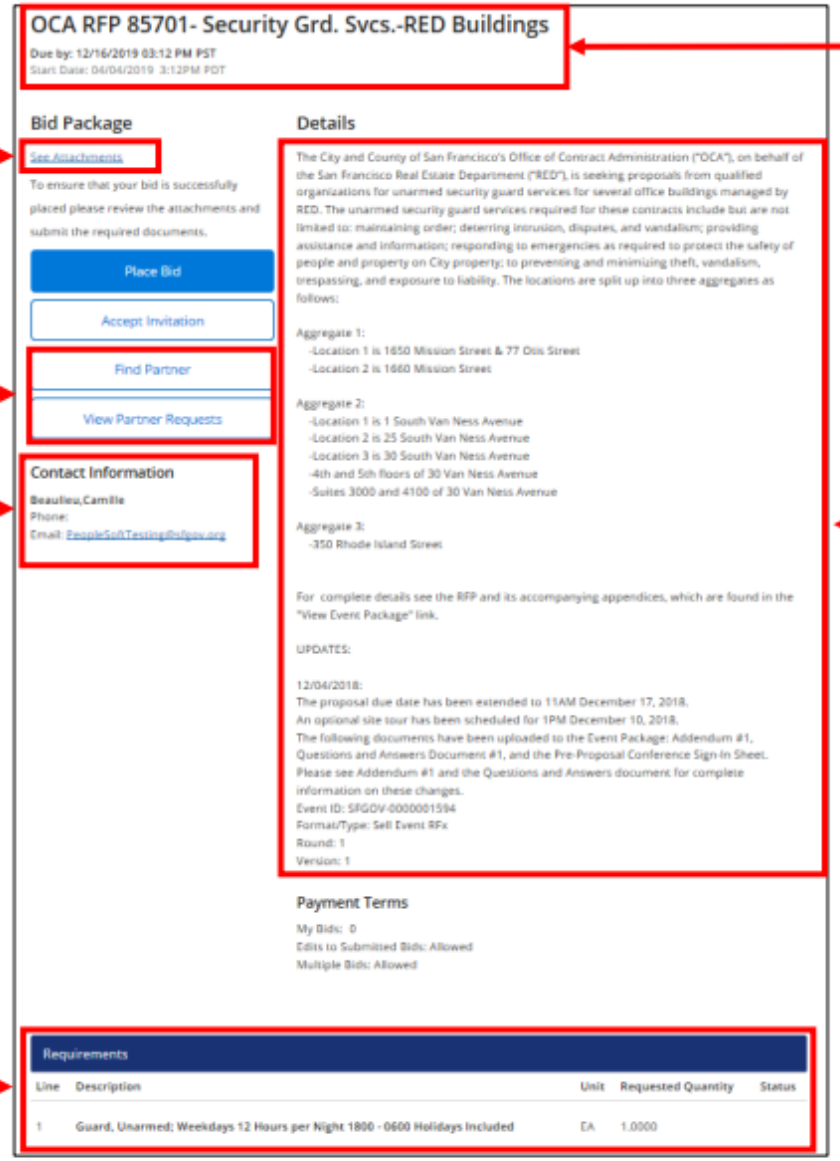
Review the Event to See if You Are Interested in Bidding

"Header Level" attachments can be found here

If you are looking for someone to Partner with on an event, use the Partner Request buttons

Contact Information for this event can be found here

These Line Items officially list what goods/services are being purchased



This section lets you know the date when your Bid is due

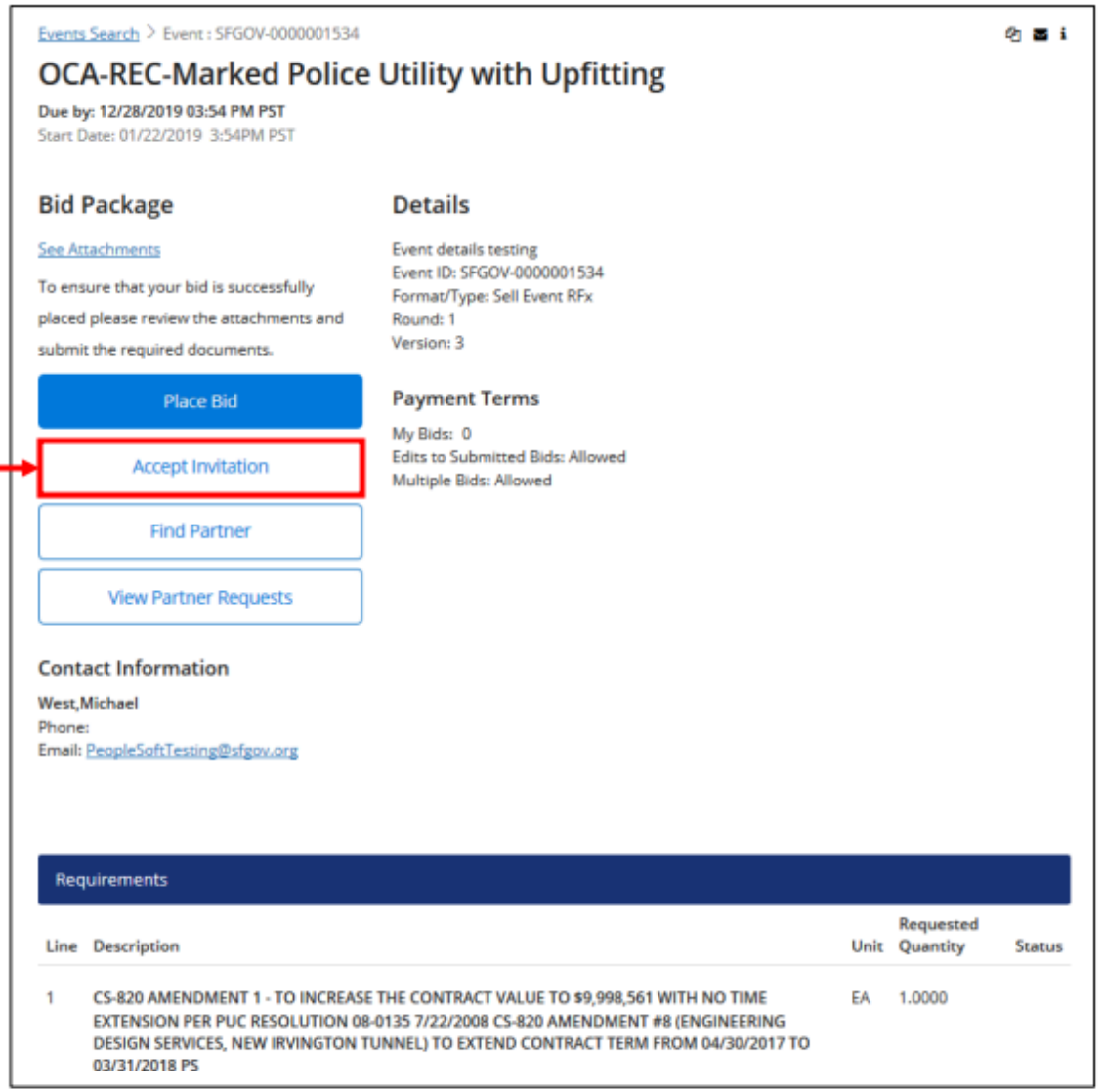
The details gives a summary of the event and may provide directions on how to bid on this event

How Do Bidders/Suppliers Enter in a Bid?

Accept the Invitation to a Sourcing Event

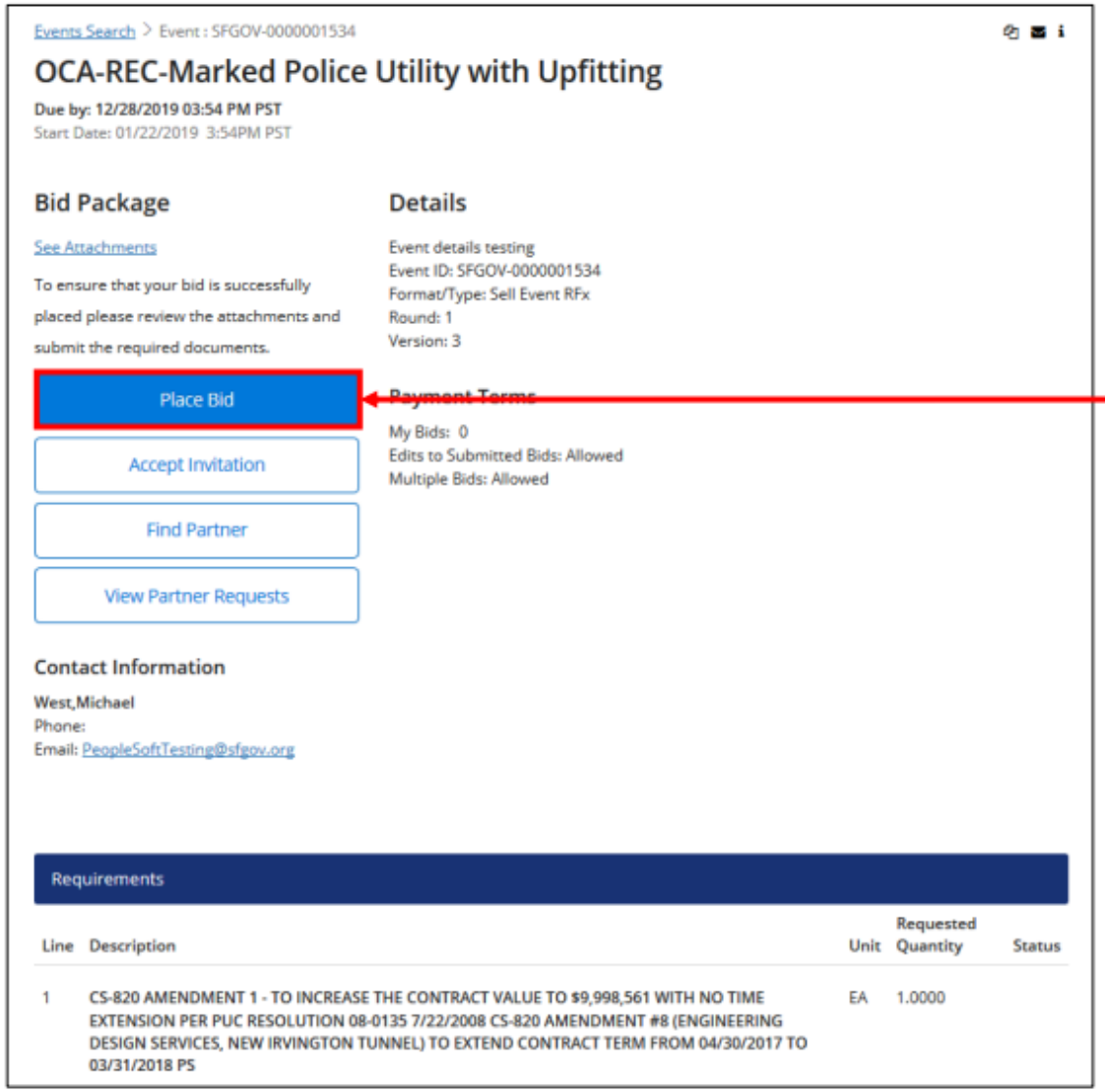
First click the Accept Invitation button.

- This lets the system know you are interested in this opportunity and allows it to send you updates if the event is changed.
- Accepting the invitation gives the Sourcing Event Administrator the ability to take certain steps to help you if system issues prevent you from entering a bid.
- Clicking this button currently returns you to the View Opportunities page, so you'll need to find your event again to bid.



How Do Bidders/Suppliers Enter in a Bid?

Enter a Bid on a Sourcing Event



The second step should be to click the Place Bid button, when you are ready to enter your bid.

How Do Bidders/Suppliers Enter in a Bid?

Enter a Bid on a Sourcing Event

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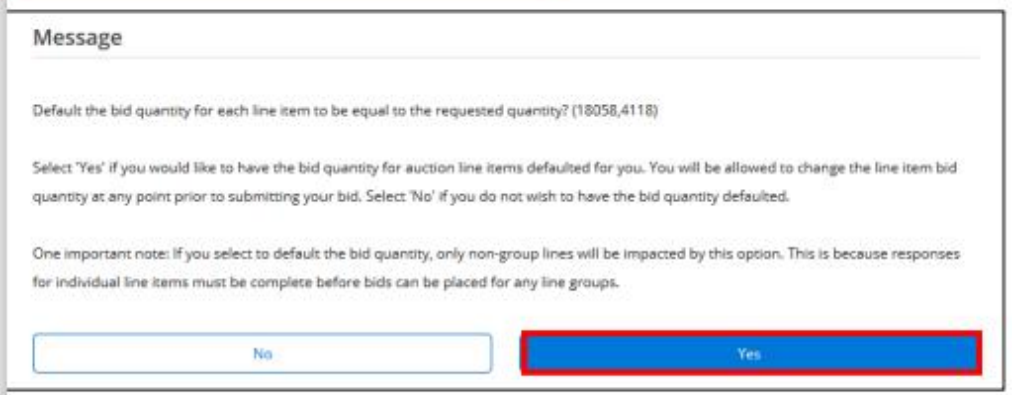
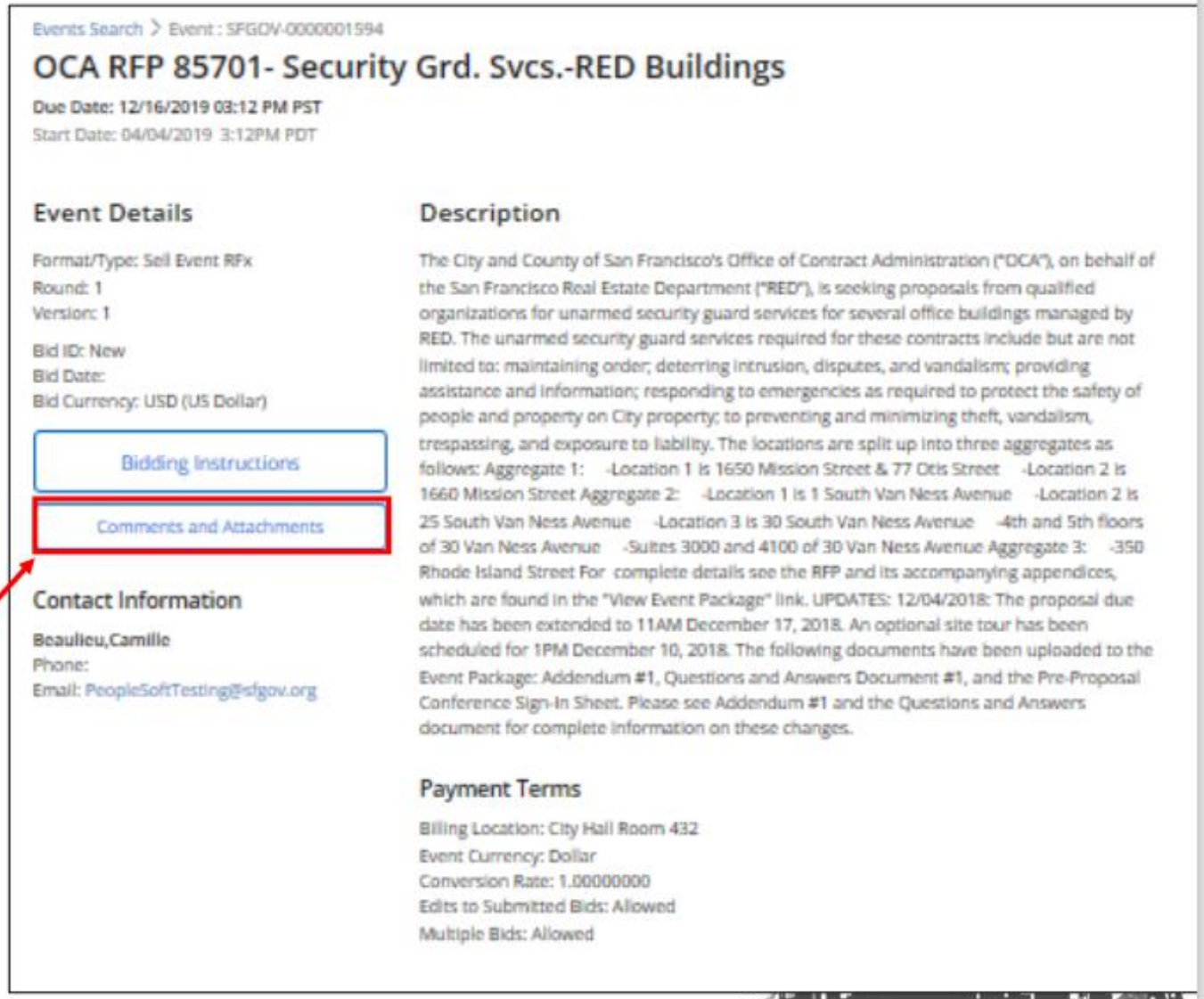
Click through the pop-up shown here...



...and arrive at the page where you can enter your bid.

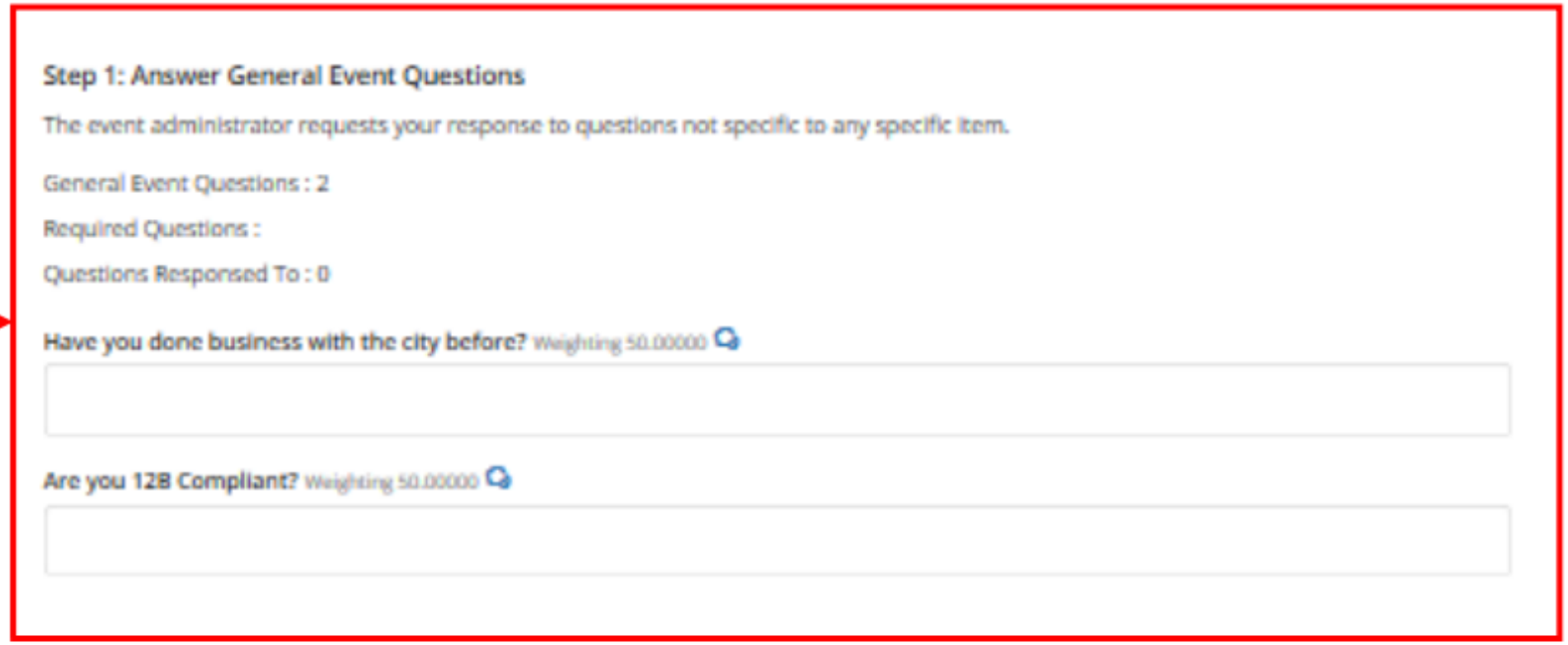
The top part of this page has general info as well as a button to take you to the attachments on this Sourcing Event.



How Do Bidders/Suppliers Enter in a Bid?

Enter a Bid on a Sourcing Event

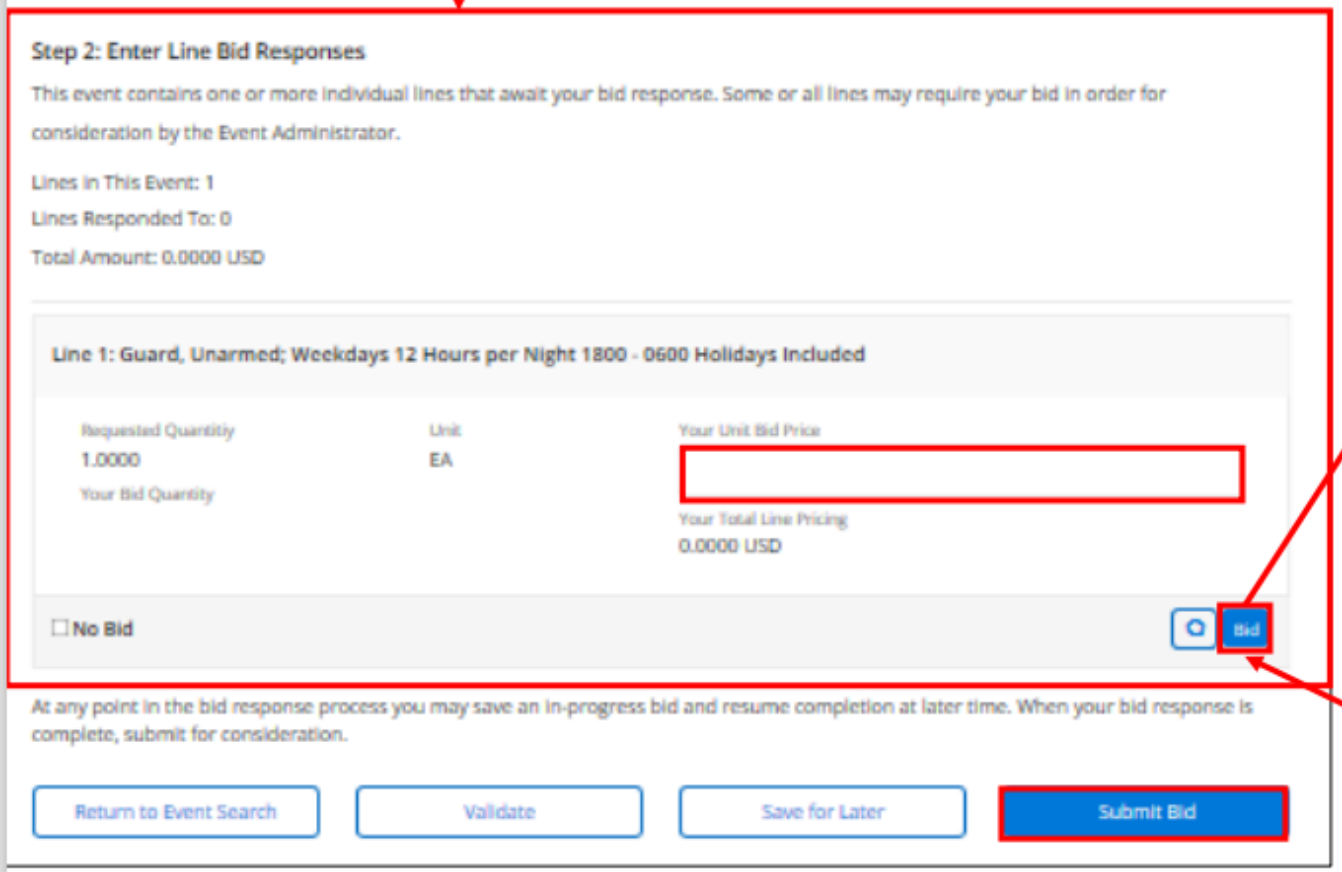
The next part of the Bid Page will require that any Bid Factor questions/requests be responded to, including answering questions, entering data, and uploading files.

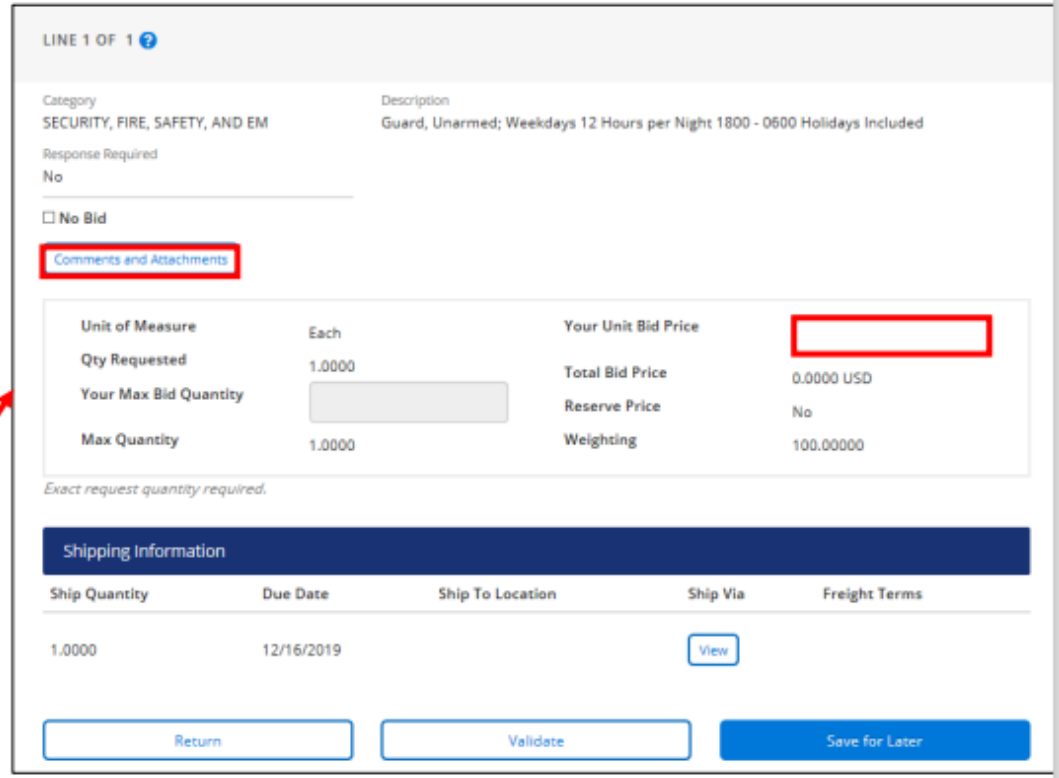


How Do Bidders/Suppliers Enter in a Bid?

Enter a Bid on a Sourcing Event

The bottom section of this form will require you to enter in your actual bid.



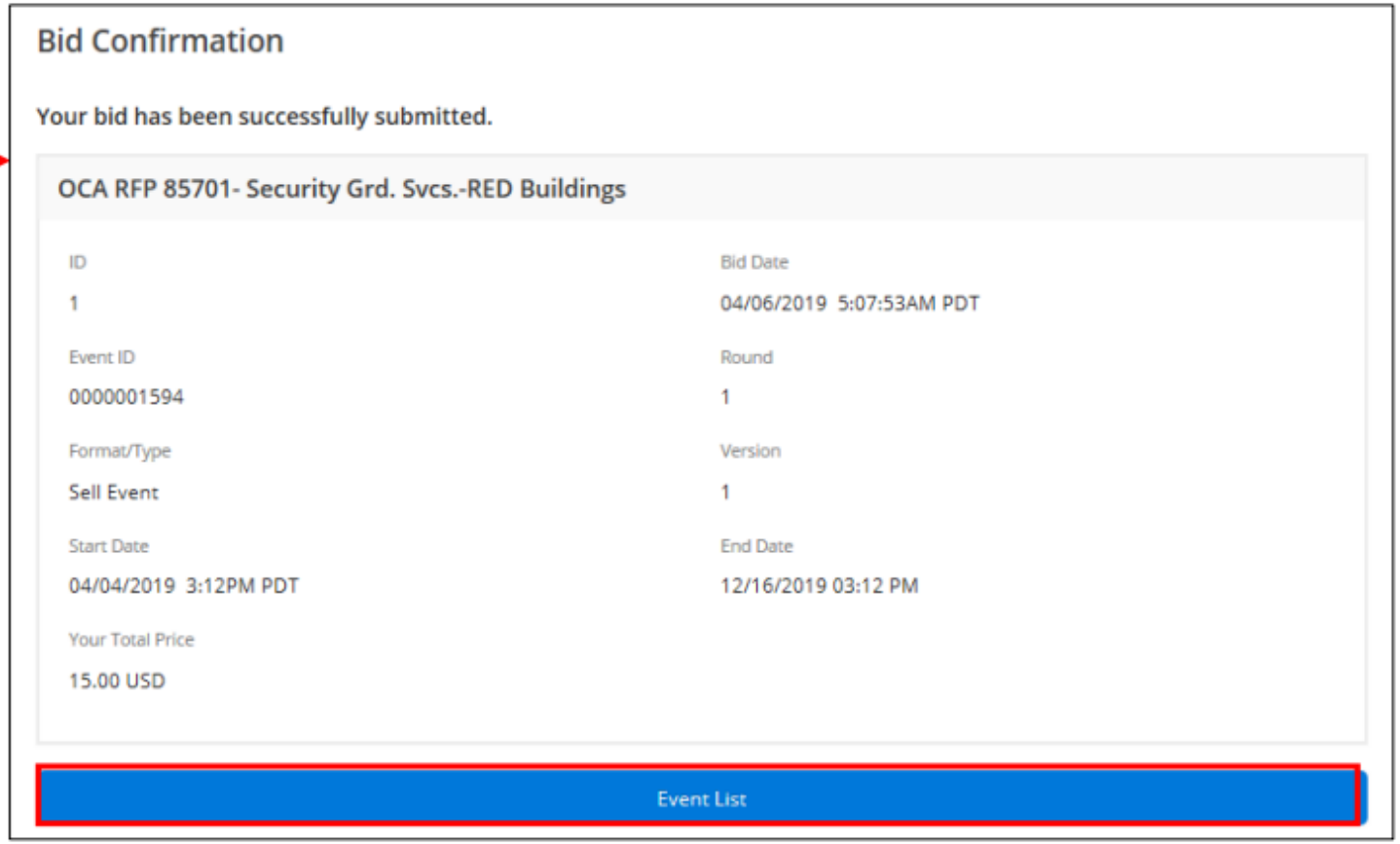


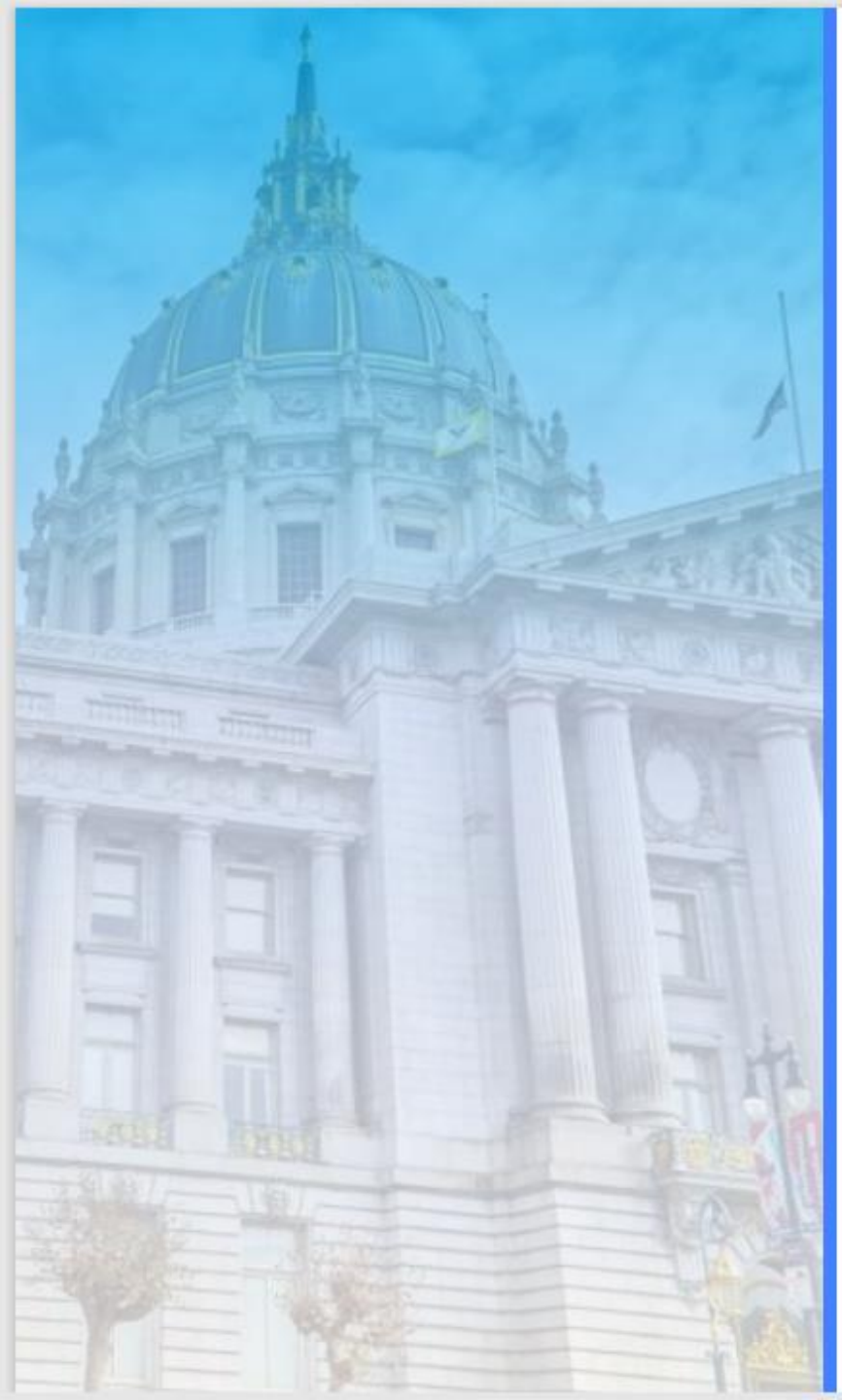
If there are Line Level Bid Factors, you will need to click in here to see these Bid Factor questions/requests.

How Do Bidders/Suppliers Enter in a Bid?

Enter a Bid on a Sourcing Event

After clicking Submit Bid, you will see a Bid Confirmation page, which you can simply click through.





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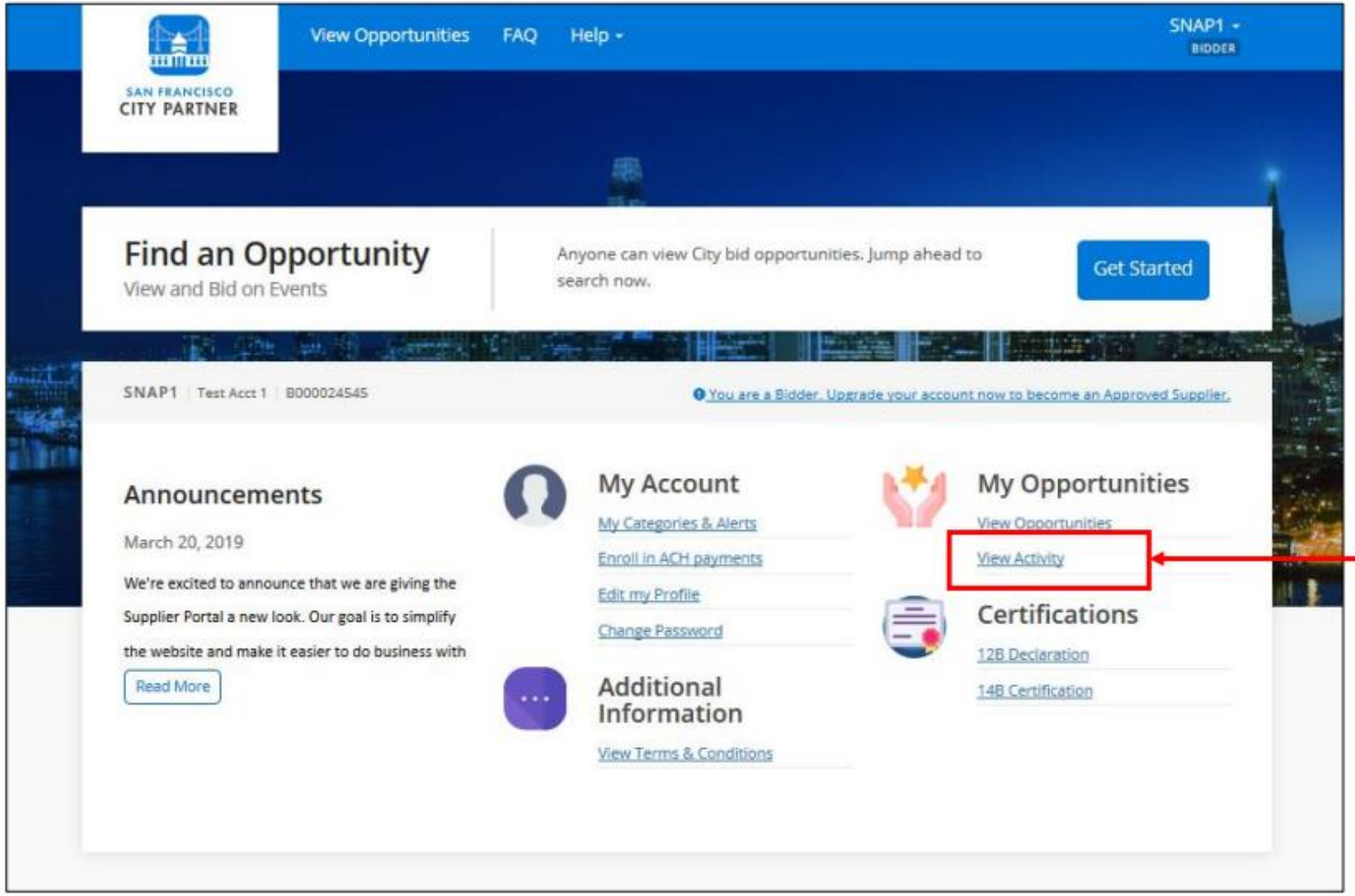

To view/edit a bid that you have already submitted, you will need to log in and click on the View Activity link to go to the Event Activity page.

Finding Events that You've Already Bid On

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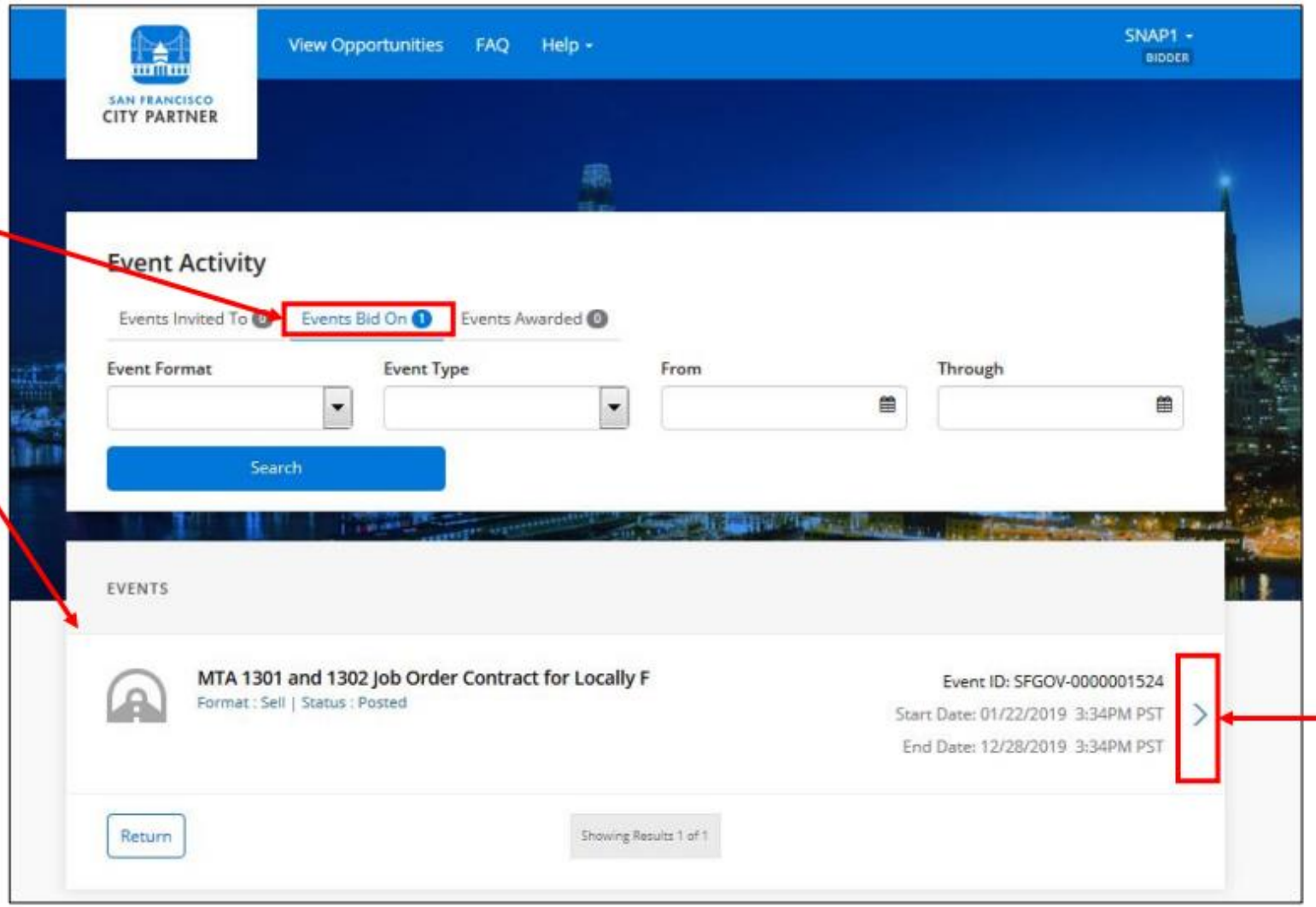
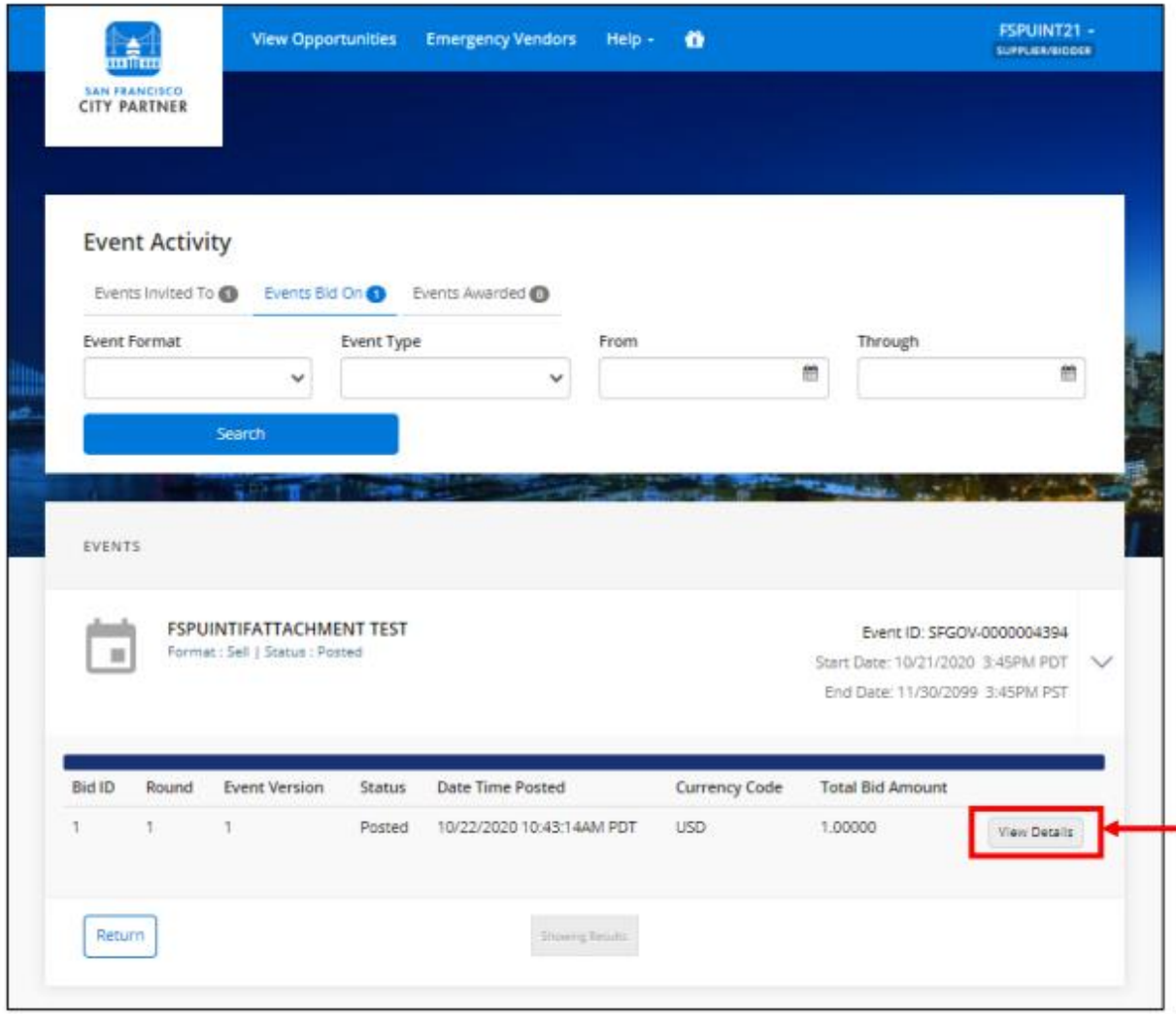
On the Event Activity page, you will then need to click on the Events Bid On link, which will cause a list of events that you've already been bid on to show below.

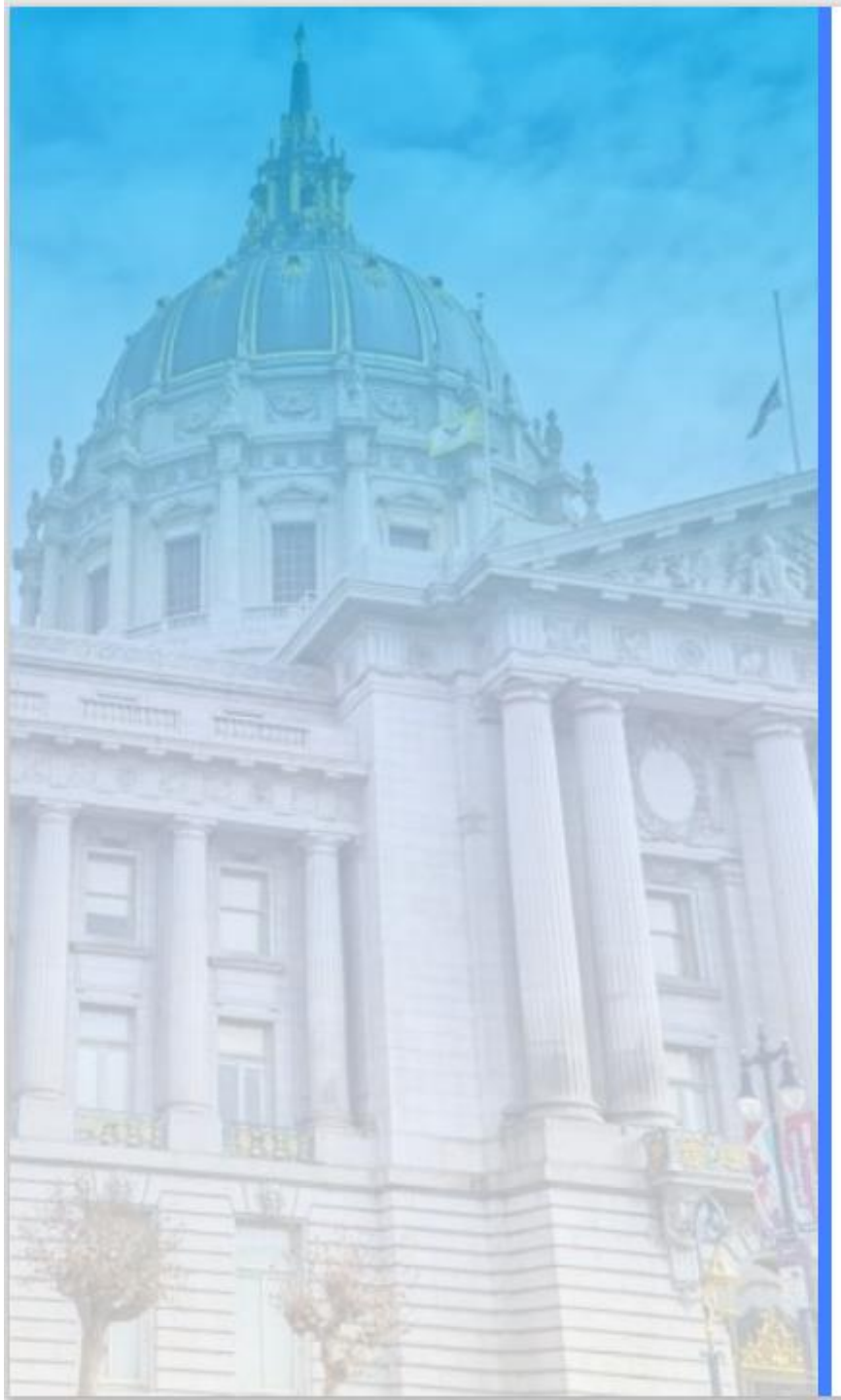


You will then click on the "greater than" icon (>) for the event that you want to view or edit.

Finding Events that You've Already Bid On



The system will then show additional details on this event/bid. You can then click the View Details button to go to the Bid Entry page for that event.



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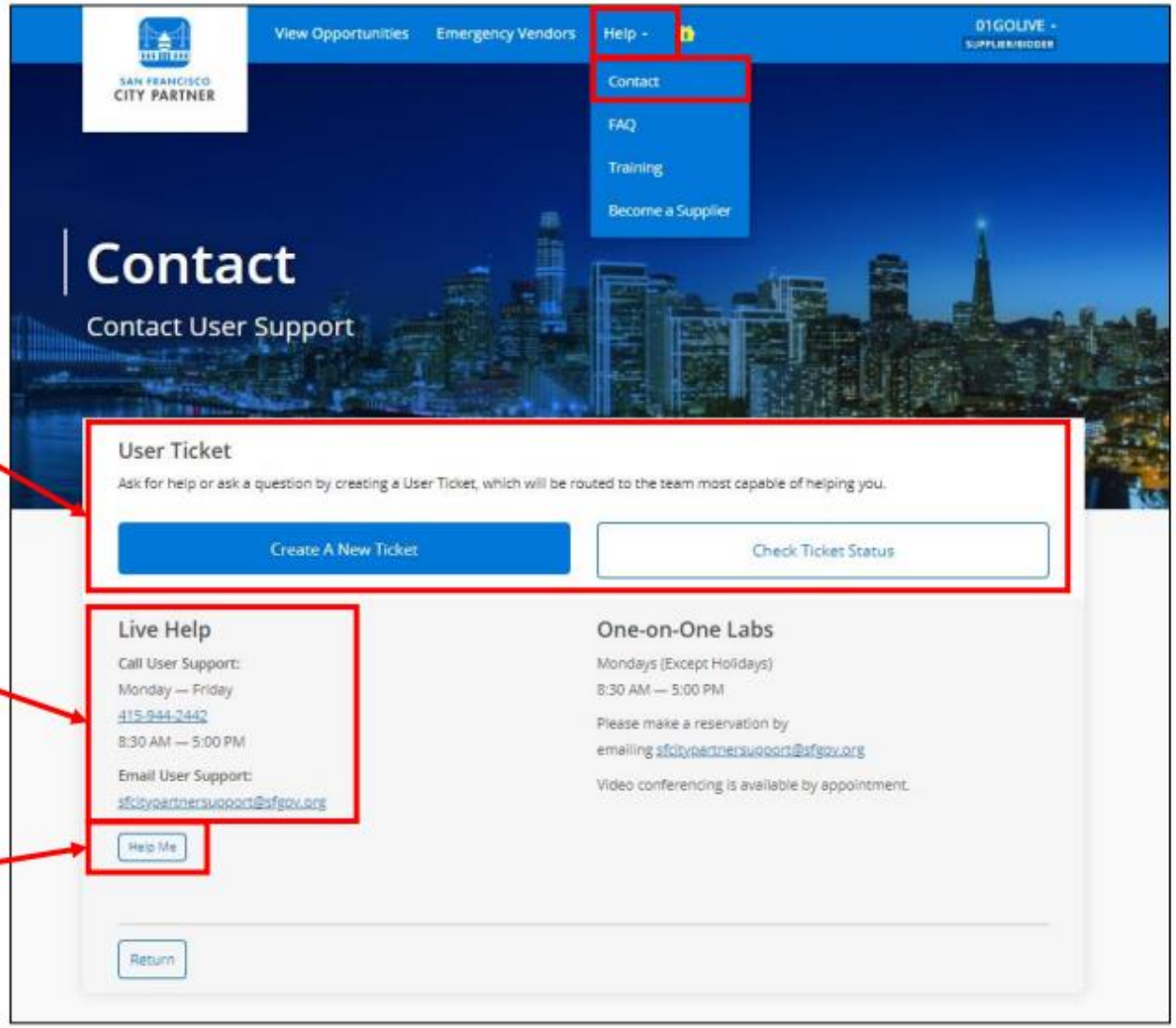
Our User Support Team Is Available to Help!

You can file a User Ticket

Live support is available on workdays from 8:30 AM – 5:00 PM via phone and/or email

We have screen-sharing technology that can be used by a User Support agent