

REQUEST FOR PROPOSALS 26.149

**Lockout/Tagout (LOTO) Written Procedure
Development Services**



CITY OF BROKEN ARROW, OKLAHOMA

TABLE OF CONTENTS

TABLE OF CONTENTS2

ADVERTISEMENT AND NOTICE3

I. INTRODUCTION & PURPOSE4

II. INSTRUCTIONS TO PROPOSERS4

III. SCHEDULE OF EVENTS6

IV. PROJECT OBJECTIVES.....6

V. SCOPE OF SERVICES.....7

VI. CONTRACTOR QUALIFICATIONS7

**VII. PROPOSAL SUBMISSION REQUIREMENTS
AND RESPONSE FORMAT**8

VIII. SELECTION PROCESS9

IX. GENERAL INFORMATION9

X. ACKNOWLEDGEMENT11

ADVERTISEMENT & NOTICE

REQUEST FOR PROPOSAL (RFP) 26.149

Lockout

City of Broken Arrow, Oklahoma

The City of Broken Arrow, Oklahoma is hereby soliciting sealed proposals for Lockout/Tagout Procedure Development Services. Proposals will be received by the Human Resources Office until **April 23, 2026**. Proposals will be received only in the Human Resource's office address shown below.

All proposals must be submitted in accordance with the RFP specifications which may be obtained during normal business hours from (8:00 a.m. to 5:00 p.m.):

City of Broken Arrow
Human Resources
P. O. Box 610
201 E. Commercial Street
Broken Arrow, OK 74013
918-259-6508 Office
918-251-9210 Fax

Proposals will be evaluated as described herein. The City reserves the right to accept part, or all, of any specific proposal(s) and to waive or disregard minor irregularities, informalities, or deficiencies. The City further reserves the right to reject all proposals, or part of any specific proposal, to hold all proposals in force and effective for ninety (90) calendar days after date of opening, to waive any informalities in the proposal(s) and to postpone, or cancel, the proposal opening date for cause or convenience.

I. Introduction and Purpose

The City of Broken Arrow (“City”) is seeking proposals from qualified contractors to develop equipment-specific Lockout/Tagout (LOTO) procedures for all applicable machinery and equipment located at City Hall, 220 South First Street, and the Field Services Building, 2300 South 1st Place.

The selected contractor will be responsible for conducting on-site assessments and producing OSHA-compliant, detailed, equipment-specific energy control procedures in accordance with applicable safety standards.

II. Instructions to Proposers

- A. Responses must be received in a sealed envelope and clearly marked as “**RFP – Lockout/Tagout Procedure Development Services**” (one original and 4 copies) and must be received no later than 4:30pm on April 23, 2026. Responses to this RFP received after this date and time will not be viewed.
- B. The envelope or container transmitting the proposals must be sealed, labeled and addressed as follows:

City of Broken Arrow, Human Resources
PO Box 610
Broken Arrow, OK 74013

RFP –Lockout/Tagout Procedure Development Services 26.149

- C. **Four (4) copies** of each proposal must be submitted together with **one unbound original** (for reproduction by the City Staff) and **one .pdf version**. Any proposal not submitted in compliance with the instructions contained in this section and/or not containing the information requested by Section VI may be declared "non-responsive" and will not be considered.
- D. The City of Broken Arrow will accept proposals that meet the requirements in this request for proposal to provide Lockout/Tagout Procedure Development Services as described herein.
- E. Any person, vendor, or corporation, able to meet the requirements of this RFP is invited to respond to this RFP. Proposals will be bound by the provisions contained in this RFP, unless an amendment or deviation is formally approved and distributed by the City.
- E. This RFP represents in writing to all proposers the most comprehensive and definite statement that the City is able to make as to the requirements, terms, and conditions for this proposal process and needs for service. Information and understandings, verbal or written, which are not contained either in this RFP, or in subsequent written addenda to this RFP, will not be considered in evaluating proposals. Any conditions or expectations

on the part of the proposer for performance by the City must be set forth in the proposal. The City is not obligated to consider the proposer's post submittal terms and conditions.

- F. The City of Broken Arrow reserves the right to amend this RFP at any time prior to the time for receipt of proposals. The City further reserves the right to cancel this RFP, in whole or in part, at any time whenever such an act is deemed in the best interest of the City.
- G. The City may request additions or modifications to any proposal as part of the negotiation process leading to the selection of a service provider. It is the intent of the City not to negotiate substantive portions of an applicant's proposal, but to rely on the information submitted in these proposals in awarding a contract.
- H. The City reserves the right to award the contract without further discussion on the proposals submitted. The City and its designees also reserve the right to reject and/or accept any and all proposals received or parts thereof. The City retains the right to waive any minor irregularities in any proposal submitted. The City may make such investigations it deems necessary to determine the ability of the proposer to provide/perform as sought by the City, and the proposer shall provide relevant information as requested.
- I. The City will not pay any costs incurred in preparing and submitting the proposal, or be required to contract for the services specified.
- J. Acceptance by the successful proposer of an award from this proposal indicates that the successful candidate is in no way currently an officer of the City of Broken Arrow or is indebted to the City of Broken Arrow. Indebtedness to any of the above shall be basis for non-award and/or cancellation of any award.
- K. Any questions concerning proposal results should be directed to Kelly Cox, Human Resources Director at 918-259-6508.
- L. Requests for clarification of any items, requirements or specifications contained herein must be received by the City, **IN WRITING**, no later than the close of business on April 10, 2026. Upon receipt of a request for clarification, the City shall respond in writing no later than April 17, 2026, and shall furnish a copy of said response to all prospective proposers who have obtained copies of the "Request for Proposals" if the response materially changes the RFP or is deemed significant. The procedure outlined above shall be followed in order to ensure competitive fairness by providing all prospective proposers with the same information. Except when in the City's best interest, the names of prospective proposers will not be divulged. In order to be provided a copy of the clarification questions/answers, proposers must submit the acknowledgement form, located at the end of this RFP, signed by an authorized person. Failure of receipt of the acknowledgement form will exclude those individuals, businesses and firms from receiving a copy of the clarification questions/answers. Questions can be emailed to kcox@brokenarrowok.gov. The City will not be held liable for emails not received.

- M. All proposals will be reviewed by a committee comprised of the Director of Human Resources, Training & Development Manager, Maintenance Services Director, and Building Maintenance Manager.
- N. Proposals must be signed by a corporate officer authorized to commit the submitting vendor, and shall remain in full force and effective for ninety (90) calendar days following the date of opening. Proposals may be withdrawn prior to opening only. Negligence on the part of the proposer shall not constitute a right to withdraw the proposal after it is opened.
- O. There is no guarantee of any minimum amount of services that may be requested during the term of the contract.

III. Schedule of Events

The City of Broken Arrow will make efforts to adhere to the following schedule:

Event	Date
RFP Release Date	April 2, 2026
Proposal Due Date	April 23, 2026
Proposal Reviews	April 24, 2026
Anticipated Contract Award	May 5, 2026
Project Kickoff	May 6, 2026
Site Visits	May 6-May 8, 2026
Draft procedure delivery	June 1, 2026
Final deliverables	June 5, 2026

IV. Project Objectives

The city seeks to establish a contract for the following services:

- a. Ensure full compliance with OSHA 29 CFR 1910.147-The Control of Hazardous Energy (Lockout/Tagout), and OAC 380:40-1-22.
- b. Identify all equipment/machinery that requires individualized LOTO procedures
- c. Develop clear, accurate, and user-friendly LOTO procedures
- d. Enhance employee safety and reduce risk of injury during servicing and maintenance activities
- e. Standardize LOTO documentation across facilities

Interested proposers shall complete and return the acknowledgement form upon receipt of this request for proposal.

V. Scope of Services

The contractor shall provide all labor, expertise, materials, and equipment necessary to complete the following:

- A. Facility & Equipment Assessment
 - a. Conduct site visits at:
 - City Hall-220 S. First Street, Broken Arrow, OK
 - Field Operations Center, 2300 South 1st Place, Broken Arrow, OK
 - b. Identify and inventory all equipment requiring LOTO procedures
 - c. Evaluate all energy sources (electrical, mechanical, hydraulic, pneumatic, thermal, etc.)
- B. Procedure Development
 - a. Develop individual, machine-specific LOTO procedures for each applicable piece of equipment
 - b. Each procedure shall include:
 - Equipment identification (name, location, ID if applicable)
 - Type(s) of hazardous energy
 - Detailed shutdown procedures
 - Isolation steps
 - Lockout/tagout application steps
 - Stored energy release methods
 - Verification of isolation
 - Restart procedures
 - c. Include clear step-by-step instructions with photos/visual aids where applicable
- C. Documentation & Deliverables
 - a. Provide procedures in both:
 - Editable digital format (Microsoft Word preferred)
 - PDF format for field use
 - b. Ensure procedures are:
 - Easy to understand for employees
 - Compliant with OSHA standards
 - Consistent in format and branding
 - c. Provide a master equipment list and index of all procedures
- D. Compliance Review
 - a. Ensure all procedures meet or exceed:
 - OSHA standards (29 CFR 1910.147)
 - Industry best practices

VI. Contractor Qualifications

Proposers should demonstrate:

- Experience developing LOTO procedures for municipalities or similar organizations
- Knowledge of OSHA safety standards
- Experience with multi-facility assessments

RFP for Lockout/Tagout Procedure Development Services

- Ability to produce high-quality, field-ready documentation

VII. Proposal Submission Requirements and Response Format

Proposers are responsible for preparing an effective, clear, and concise proposal. In order to be considered for selection, proposer must submit a complete response to this Request for Proposal that includes the following mandatory information and/or requirements in the following format. Failure to provide any of the information requested below may be cause for the proposal to be rejected.

- A. A Request for Proposal cover letter introducing the Business, Individual or Firm and the individual who will be the primary contact person. Proposals must be signed by a corporate officer authorized to obligate the business, individual, or firm, and shall remain in full force and effective for ninety (90) calendar days following the date of opening. Proposals may be withdrawn prior to opening only. Negligence on the part of the proposer shall not constitute a right to withdraw the proposal after it is opened.
- B. Background information including specific qualifications and recent experience must be included. Failure to provide this information may be cause for the proposal to be rejected:
 - a. Describe your organizational structure and explain how your organization qualifies to be responsive to the requirements of this RFP.
 - b. Describe experience providing recent similar services as required in this Request for Proposal.
 - c. Provide a project staffing organizational chart listing proposed personnel assigned to this project. Include assigned duties, and comprehensive resumes for each individual listed. Resumes must list education, training, professional work experience, and a listing of work performed comparable to that described within this Request for Proposal.
 - d. Describe any unique tools or services your company provides and how you rise above your competitors.
 - e. Describe the methodology for identifying equipment and developing procedures
 - f. Describe the approach to ensure accuracy and compliance
 - g. References: Provide a list of at least four (4) clients for whom you have conducted business. Indicate the client organization name, contact person, phone number, and how long you have provided them services.
 - h. Provide an overview of the cost and fee structure associated with your solution offerings, which may include the total project cost, cost per piece of equipment (if applicable), and any separate pricing for optional services.
 - i. Estimated project duration and milestones.
 - j. Provide any fees/training/documentation costs, if any, which may be associated with your services.
 - k. Please list any service(s) that must be purchased separately.

- C. Submit four (4) originals and one (1) electronic copy of the proposal to the Human Resources Director of the City of Broken Arrow per the direction and address included on page one of this document. Responses must be received in a sealed envelope and clearly marked as “RFP-Lockout/Tagout Procedure Development Services **26.149**”. Responses to this RFP must be received no later than 4:30pm on April 23, 2026. Responses received after this date and time will not be viewed.
- D. By submitting a proposal, the vendor is verifying it has Workers’ Compensation consistent with appropriate coverage as required by the State of Oklahoma. The proposer is also verifying they have Commercial General Liability, Professional Liability, personal injury and property damage liability, contractual liability, independent consultant's liability, and automobile liability insurance from an A.M. Best Rated A+ insurer, with minimum combined liability limits of One Million Dollars (\$1,000,000) per occurrence, and a maximum deductible of One Thousand Dollars (\$1,000) per occurrence and that the City will be named as Additional Insured with all the appropriate endorsements.

VIII. Selection Process

Each proposal received will be evaluated and reviewed to determine if it meets the stated requirements in this Request for Proposal. The City’s purpose in soliciting proposals is to determine and select the best qualified firm with which to negotiate a contract at the best possible price. In order to accomplish this objective, the following evaluation criteria and procedure will be used:

Evaluation Criteria

	Points
Relevant Experience and Qualifications Our evaluation will include an assessment of the history of your company, your experience as it relates to the requirements within this RFP, evidence of past performance, quality and relevance of past work, references, and related items.	30
Understanding of scope and methodology Our evaluation will include an assessment of the qualifications and experience of your management team, staff and personnel assigned to our team.	20
Work Plan, Approach and Timing Our evaluation of the effectiveness of your services and the timeline associated with the project	30
Cost Effectiveness Effectiveness and efficiency of costs	20
Total	100

IX. General Information

The City of Broken Arrow reserves the right to reject any or all proposals and will not be liable for any costs incurred by responding firms relating to the preparation and submittal of proposals, making of initial presentation to the City, negotiating a contract for services, or any other expense

incurred by the proposer prior to the date of an executed contract. In addition, no proposer shall include any such expenses as part of the price proposed to conduct the scope of work for this project.

- A. Proposals must be valid for 90 calendar days beginning April 23, 2026.
- B. The City reserves the right to expand or diminish the scope of the work subject to negotiation with the successful proposer.
- C. The City is not required to select the proposal that may indicate the lowest price or costs. The City expressly reserves the right to reject all proposals at its sole discretion and opinion, without indicating any reason(s) for such rejection. If all proposals are rejected, the City may or may not request additional proposals. The City may withdraw this RFP at any time without advance notice.
- D. The successful firm shall defend, indemnify, save and hold harmless the City of Broken Arrow, its officers, agents, and employees, from any demands, claims, suits, damages, or actions that may be brought by third persons on account of bodily injury or death; personal injury; damage to property or personal interest; or violation of any law, regulation or ordinance; where the third person's loss, demand, claim, suit, damages, or action arises in whole or part out of any negligent or other act or omission of the successful firm or its officers, employees, and agents, while performing the services agreed to save and except those actions arising out of the sole negligence of the City.
- E. The successful firm shall submit appropriate evidence of required insurance coverages, licenses, or permits prior to the effectuation of any contract for services described herein, as required by the City.
- F. The successful firm shall not transfer the responsibility for any part of their contractual obligation without prior written approval of the City Manager of the City of Broken Arrow.
- G. The City reserves the right to terminate the agreement upon giving the successful firm 15 days' written notice of termination.
- H. In the event it becomes necessary to revise any part of this Request for Proposal, an addendum will be provided in writing to all individuals, businesses and firms receiving the Request for Proposal from the City. The City reserves the right to terminate the agreement upon giving the successful firm 15 days' written notice of termination.
- I. Inquiries to this Request for Proposal/Information should be addressed via email to:

Kelly Cox, Human Resources Director
City of Broken Arrow, OK
PO Box 610
Broken Arrow, OK 74013
918-259-6508 kcox@brokenarrowok.gov

