

STAR Strategic Sourcing Module: *Advanced Workshop*



Agenda

- *Let's Hear From You!*
- Fluid Tiles vs. NavBar: Navigator
- Sourcing Event Workbench
- Define Scoring: Rating Scale vs Total Points
- Download Event Documents
- Queries
- Proxy Entries/New Bidder IDs
- Bidder Communications
- Strategic Sourcing Resources and Training



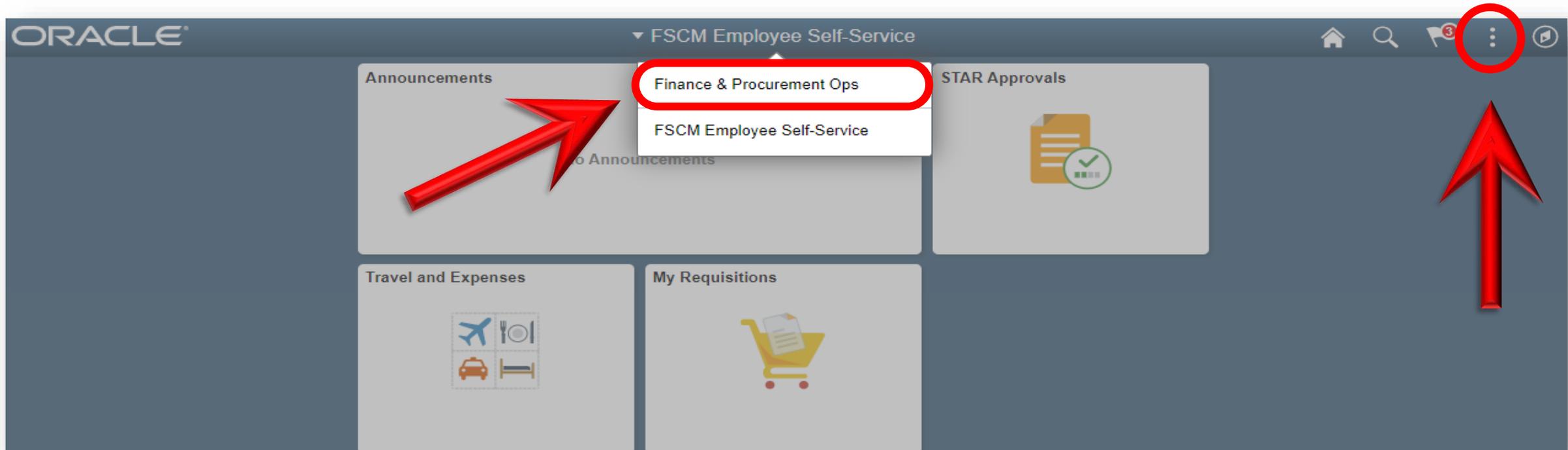
Let's Hear From You!

- What issues are you running into?
- Any questions or concerns about an upcoming RFB or RFP?
- First Evaluation Committee meeting coming up? Unsure of what to expect?
- Anything you want additional information on?



Fluid Tiles vs. Fluid NavBar: Navigator

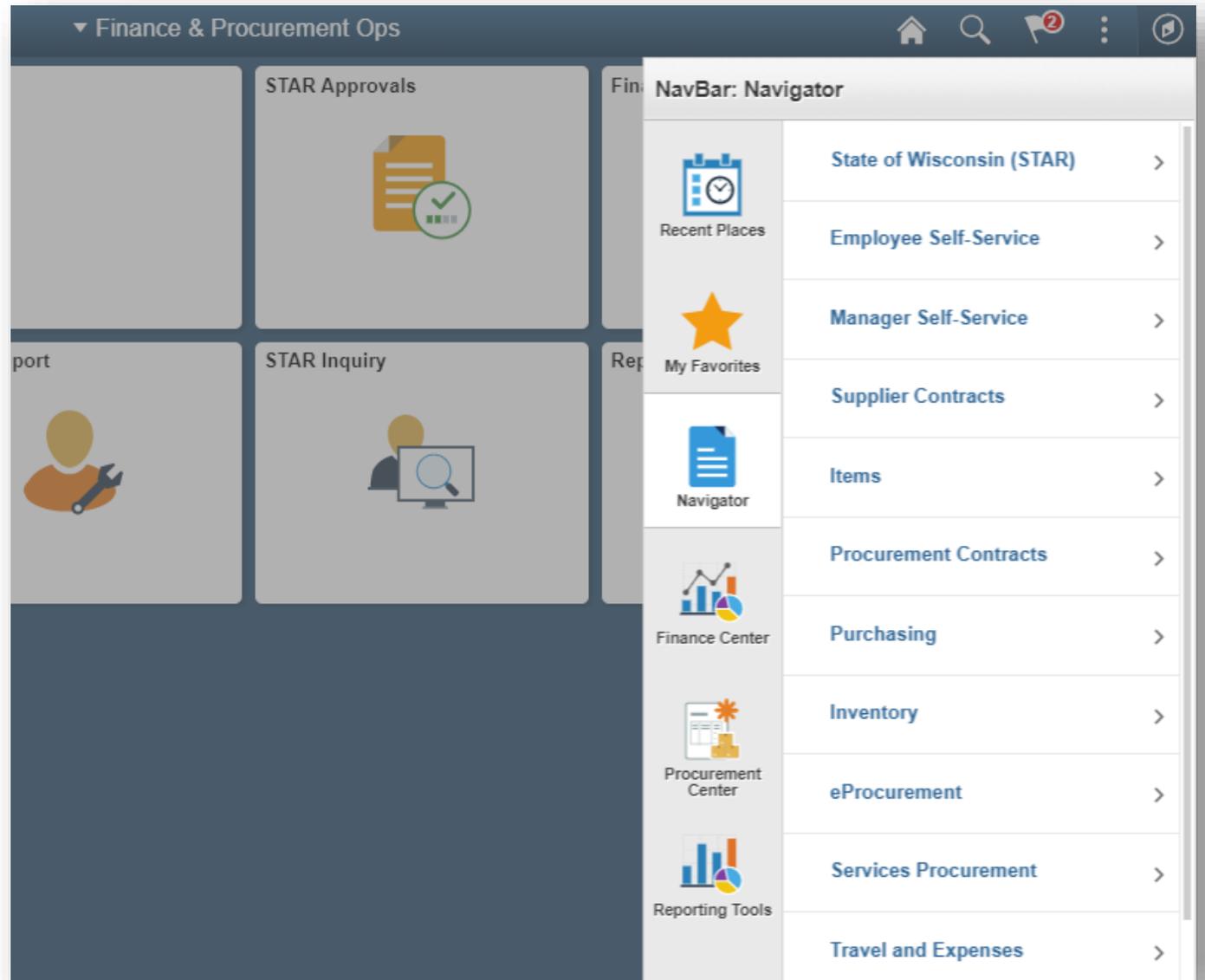
- Fluid Tiles are easier to navigate than using the NavBar: Navigator
- Update home screen from “FSCM Employee Self-Service” to “Finance & Procurement Ops”
- Use My Preference to save home screen settings



Fluid Tiles vs. Fluid NavBar: Navigator



Fluid Tiles vs. Fluid NavBar: Navigator



Sourcing Event Workbench

- Using Fluid Tiles: Procurement Center > Strategic Sourcing will open directly to the Sourcing Event Workbench
 - One-stop resource for all Events available to you

Sourcing Event Workbench

▼ Search Criteria

Business Unit 🔍 Available From Date 📅 To Date 📅

Event Number 🔍 Response Due Date From 📅 End Due Date 📅

Event Type ▼

Event Status ▼

Solicitation Reference #

Title

Created By 🔍

NIGP Filter ? NIGP Codes

Search Mode ▼ Search Clear Create New Event

Sourcing Event Workbench

- Can also be found using Procurement Center > View History

Search Results

Business Unit	Event Number	Solicitation Reference #	Event Type	Event Status	Title	Available Date	Response Due Dt	Response due	View History	View Responses	Scoring Results	Q & A	Cancel	Copy
50500	10854	AD200844	Request for Bid	In Development	Worker's Compensation Claims Investigation									
50500	10864	AD200824	Request for Bid	Award Phase	Weatherization and Home Heating System Inspections	07/12/2019	08/13/2019							
50500	10806	AD200818	Request for Proposal	Posted/Awaiting Responses	Home Energy Plus (HE+) Program Training and Technical Assistance	08/22/2019	10/03/2019							
50500	10535	AD200802	Request for Proposal	Award Phase			19							
50500	10520	AD190794	Request for Proposal	Evaluation			19							
50500	10492	AD200803	Request for Proposal	Posted/Awaiting Responses			19							
50500	10484	AD200809	Request for Bid	Award Phase			19							
50500	10232	AD200784	Request for Proposal	Posted/Awaiting Responses			19							

Personalize | Find | [?] | []

Response due View History View Responses Scoring Results

Response due View History View Responses Scoring Results



Define Scoring:

Rating Scale vs. Total Points



Rating Scale

- The scale the Evaluation Committee use to apply scores to sections
- Defaults to 10
- All scored sections use the same Rating Scale
 - You cannot have different sections with different Rating Scales

Total Points

- Total number of points available to Bidders
- Includes scored sections and cost proposal

Define Scoring: Rating Scale vs. Total Points

Setup Scoring

Event Number: 10069

Title: Cigarette Tax Stamp Printing and Distribution Services

Scoring Parameters

Rating Scale: 3050

Total Points: 3600

Distribute

Calculate

Clear/Start Over

Point Assignment

Section Title

1 PROPOSAL RESPONSE

\$:



Lock by
Points

Points
3050

Percent
85

2 Cost Proposal

\$:



Points

Points
550

Percent
15

Save

Return



Define Scoring: Rating Scale vs. Total Points

Setup Scoring

Event Number: 10517

Title: Actuarial Services for the State Life Insurance Fund

Scoring Parameters

Rating Scale: 10

Total Points: 1000

Distribute

Calculate

Clear/Start Over

Point Assignment

<u>Section Title</u>			<u>Lock by</u>	<u>Points</u>	<u>Percent</u>
5 GENERAL REQUIREMENTS (400 POINTS)	\$: <input type="checkbox"/>		Points	400	40
5.1 Organizational Capabilities #1	\$: <input type="checkbox"/>		Points	200	50
5.2 Organizational Capabilities #2	\$: <input type="checkbox"/>		Points	100	25
5.3 Staff Qualifications	\$: <input type="checkbox"/>		No	100	25
6 TECHNICAL REQUIREMENTS (400 POINTS)	\$: <input type="checkbox"/>		Points	400	40
6.1 Technical Requirement #1	\$: <input type="checkbox"/>		Points	200	50
6.2 Technical Requirement #2	\$: <input type="checkbox"/>		No	200	50
7 COST PROPOSAL (200 POINTS)	\$: <input checked="" type="checkbox"/>		No	200	20

Define Scoring: Rating on a Consistent Scale

Rating Scale	Evaluator Score	Available Section Points	Weighted Section Points Awarded
0 – 10	8	200	?

$$\left(\frac{\text{Evaluator Score} = 8}{\text{Rating Scale Maximum} = 10} \right) \times \text{Available Section Points} = 200$$

Weighted Section Points Awarded = 160



Define Scoring: Rating on a Consistent Scale

Rating Scale	Evaluator Score	Available Section Points	Weighted Section Points Awarded
0 – 10	3	30	?

$$\left(\frac{\text{Evaluator Score} = 3}{\text{Rating Scale Maximum} = 10} \right) \times \text{Available Section Points} = 30$$

Weighted Section Points Awarded = 9



Define Scoring: Rating on a Consistent Scale

Rating Scale	Evaluator Score	Available Section Points	Weighted Section Points Awarded
0 – 10	4	450	?

$$\left(\frac{\text{Evaluator Score} = 4}{\text{Rating Scale Maximum} = 10} \right) \times \text{Available Section Points} = 450$$

Weighted Section Points Awarded = 180



Define Scoring: Rating on a Consistent Scale

Rating Scale	Evaluator Score	Available Section Points	Weighted Section Points Awarded
0 – 10	2	150	?

$$\left(\frac{\text{Evaluator Score} = 2}{\text{Rating Scale Maximum} = 10} \right) \times \text{Available Section Points} = 150$$

Weighted Section Points Awarded = 30



Define Scoring: Event Complexity Scale



System Utilization Level		Event Type and Complexity
<p>High Maximum use of module (all requirements entered as bid factors; all bidder responses in system; bid award analysis calculated in STAR)</p>	Least Complex	<p>Simplified Bids</p> <p>Bid with single cost structure</p> <p>Bid in single industry or category</p>
<p>Moderate Event entered to the greatest extent allowed by complexity and practicality of the solicitation</p>		<p>Bid requires physical samples</p> <p>RFP with single cost structure</p> <p>Bid with multiple cost structures</p>
<p>Low Minimal information in module (all bid content loaded as attachment; no scoring in system; results of event evaluation keyed manually)</p>		<p>RFP with multiple cost structures</p> <p>Voluminous proposal response required</p> <p>Voluminous requirements (bid or RFP)</p>
	Most Complex	

Download Event Documents

Procurement Center > Strategic Sourcing > Event Development > Download Event Documents

- Use Download Event Documents to create a PDF of the Event's Bid Factors
- Attach the Event Bid Factors PDF to Supporting Documents
- Use as a Bidder Checklist for hardcopy responses
- Easy way to ensure all Bid Factors are present

Download

Download All Event Related Documents

Event Number 10049 Business Unit 14400
Event Type Request for Proposal
Title Investment Advisory and Performance Analysis

▼ Reports

- Download All Attachments
- Event Bid Factors
- Event Bidder List
- Event Communications
- Event History
- Event NIGP Codes
- Event Q&A
- Event Users
- Bidder Response Summary
- Bidder Responses
- Single Bidder Response
- Score Summary

Queries

- Fluid Tile - Reporting Tools (directly to Query Viewer)
- Different Search By options available

The screenshot shows the 'Query Viewer' interface. At the top, it says 'Query Viewer' and 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a search area with a dropdown menu labeled '*Search By' and a 'Search' button. The dropdown menu is open, showing a list of search criteria: 'Query Name', 'Access Group Name', 'Description', 'Folder Name', 'Owner', 'Query Name' (highlighted in blue), 'Type', 'Uses Field Name', and 'Uses Record Name'. To the right of the dropdown is a text input field with the label 'begins with'.



Queries

- Query for registered Bidders list by NIGP Code: WI_SS_BIDDER_BY_NIGP
- Query for registered Bidders list: WI_SS_ALL_REGISTERED_BIDDERS

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query									
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
WI_SS_BIDDER_BY_NIGP	Bidder by NIGP code	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

Personalize | Find | View All | First 1 of 1 Last



Queries

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By

Query Name ▼

begins with

Search

[Advanced Search](#)

▼ My Favorite Queries

[Personalize](#) | [Find](#) | 

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule
WI_SS_BIDDER_BY_NIGP	Bidder by NIGP code	Public		HTML	Excel	XML	Schedule



Proxy Entries/ New Bidder IDs



- Ensure complete response before adding
 - Cannot add documents received from clarifications if necessary
- When Proxy Bids are added, Bidder will receive email with Bidder ID
 - Bidder will not be able to use Bidder ID until they have a WAMS ID



Bidder Communications



Sending Bidder Communications through Strategic Sourcing

Pros:

- Already in the Procurement File
- Bidders can respond through Strategic Sourcing

Cons:

- Out of Office responses are not received
- If there's a time constraint – highly suggest sending communication through Outlook

Bidder Communications

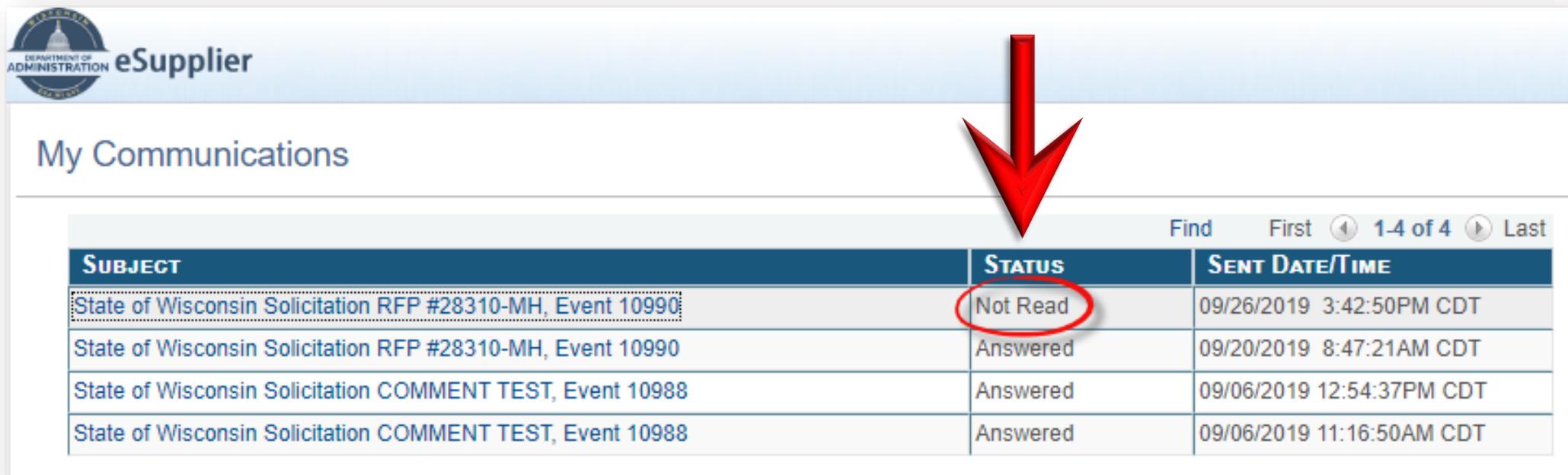
- Sourcing manager must initiate communication through the event
- The sourcing manager must keep the Allow Responses box checked (it's checked by default)
- May include more than one bidder
- Bidder will see new communications when they login to eSupplier

The screenshot displays the eSupplier portal interface. At the top left is the Wisconsin Department of Administration logo. The main header reads "eSupplier". Below this is a dark blue bar with the text "My INFORMATION". On the left side, there is a box titled "ACCOUNT OPTIONS" containing links for "My NIGP Codes", "My Responses", "My Profile", and "My Communications". On the right side, there is a section for user information: "Company" (STAR Testing), "Logged in as" (STARTESTING), and "Your Bidder ID" (0000001228). At the bottom of the interface, a red oval highlights the message "You have a new communication".



Bidder Communications

- Bidders can easily identify new communications
- Bidders can send a response from eSupplier directly back to the sourcing manager/event



The screenshot shows the 'My Communications' section of the eSupplier interface. A table lists four communication entries. The first entry, 'State of Wisconsin Solicitation RFP #28310-MH, Event 10990', has a status of 'Not Read', which is circled in red. A large red arrow points to this status. The other three entries are marked as 'Answered'. The table includes columns for 'SUBJECT', 'STATUS', and 'SENT DATE/TIME'. Navigation controls for 'Find', 'First', '1-4 of 4', and 'Last' are visible at the top right of the table area.

SUBJECT	STATUS	SENT DATE/TIME
State of Wisconsin Solicitation RFP #28310-MH, Event 10990	Not Read	09/26/2019 3:42:50PM CDT
State of Wisconsin Solicitation RFP #28310-MH, Event 10990	Answered	09/20/2019 8:47:21AM CDT
State of Wisconsin Solicitation COMMENT TEST, Event 10988	Answered	09/06/2019 12:54:37PM CDT
State of Wisconsin Solicitation COMMENT TEST, Event 10988	Answered	09/06/2019 11:16:50AM CDT



Bidder Communications

Bidder Communications

REGARDING SOLICITATION

Event Number: 10990

Title: Information Technology Vendor Managed Services and Solution

Reference #: RFP #28310-MH

COMMUNICATION FROM THE STATE OF WISCONSIN

Subject State of Wisconsin Solicitation RFP #28310-MH, Event 10990

Date Sent 09/20/2019

Hey. Just wanted to be sure you're receiving the info. Could you confirm, please?

Attachments

State_Seal.jpg

Replies are date/time stamped and always available to the bidder

MY REPLIES

09/20/2019 11:55 AM

REPLY

RETURN TO MY COMMUNICATIONS



Bidder Questions



- Bidders see questions and answers in the order they were asked by all bidders
- Unanswered questions are displayed separately and are only visible to the bidder that asked the question

QUESTIONS & ANSWERS

(1) General Question:

Q: Do you anticipate extending the due date?

A: No I don't.

My Questions

Q: *What's up?*

ASK A QUESTION

STAR Strategic Sourcing Module

Resources & Training



- [STARConnection.wi.gov](https://www.starconnection.wi.gov)
 - Resources > Finance & Procurement > Job Aids, search for “Strategic Sourcing”
- [SBOP Website](#)
- Contact STAR or SBOP prior to entering an event!
- [SBOP Newsletter](#), with Strategic Sourcing Tips & Tricks monthly article
 - Browse the [SS Tips & Tricks Archive](#)
- Strategic Sourcing classes planned for 2020
 - Sign up through ELM
 - Will announce dates in SBOP Newsletter and during RFB and RFP classes

Questions?

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