



Pre-Solicitation Steps

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Pre-Solicitation Steps



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DOA-CAPS
Procurement Specialist



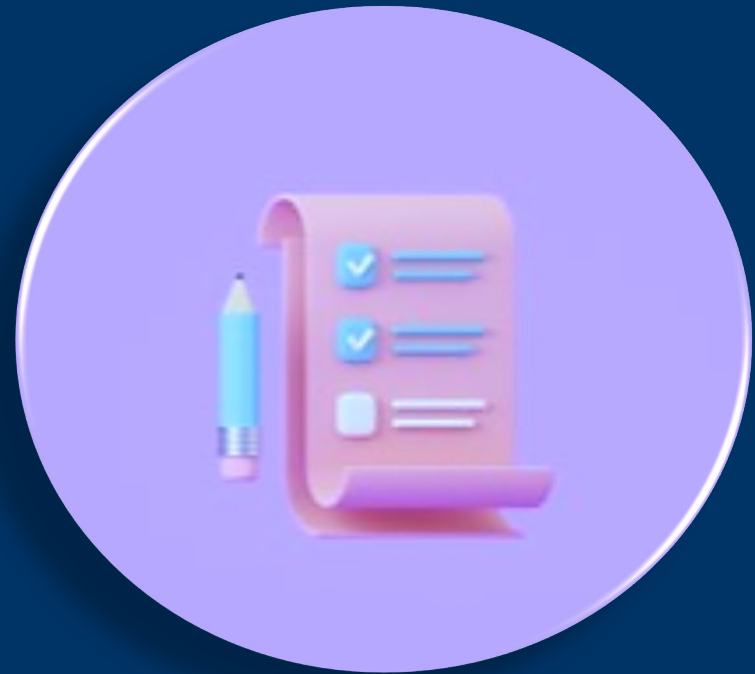
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Agenda

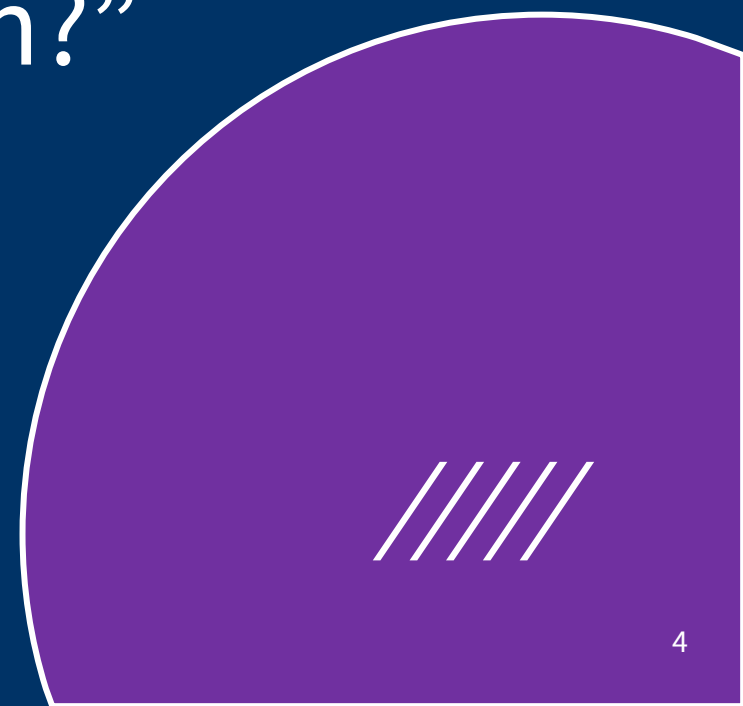
- Why planning matters
- Identifying need
- Procurement strategy
- Market research
- Bidder outreach
- Best practices





What do you think of when you hear the term “pre-solicitation?”

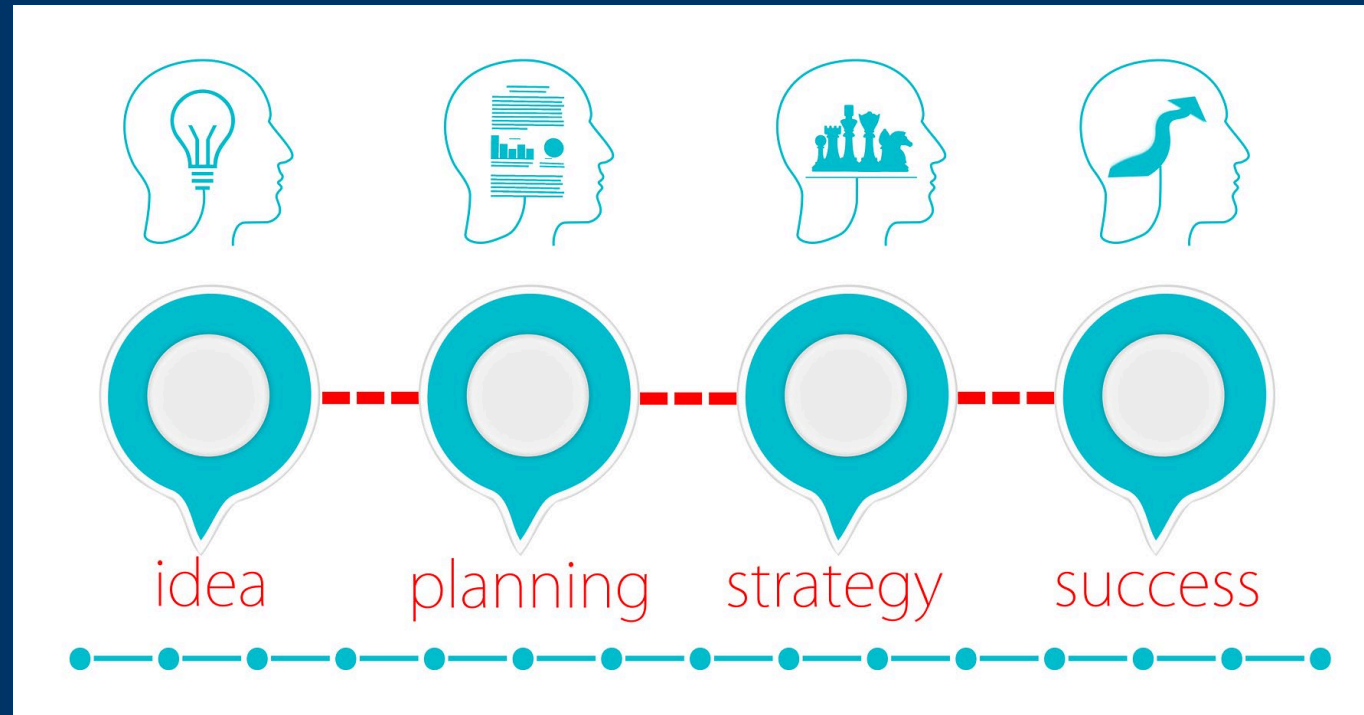
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Pre-Solicitation



Pre-solicitation encompasses all the steps and processes occurring before a solicitation is posted.





Why Planning Matters

Planning in the pre-solicitation phase of the procurement process will help:

- Identify needs
- Determine which procurement strategy will match the need
- Reduce the quantity of bidder questions
- Strengthen the State's position in the event of a protest
- Improve the outcome of the solicitation





Why Planning Matters

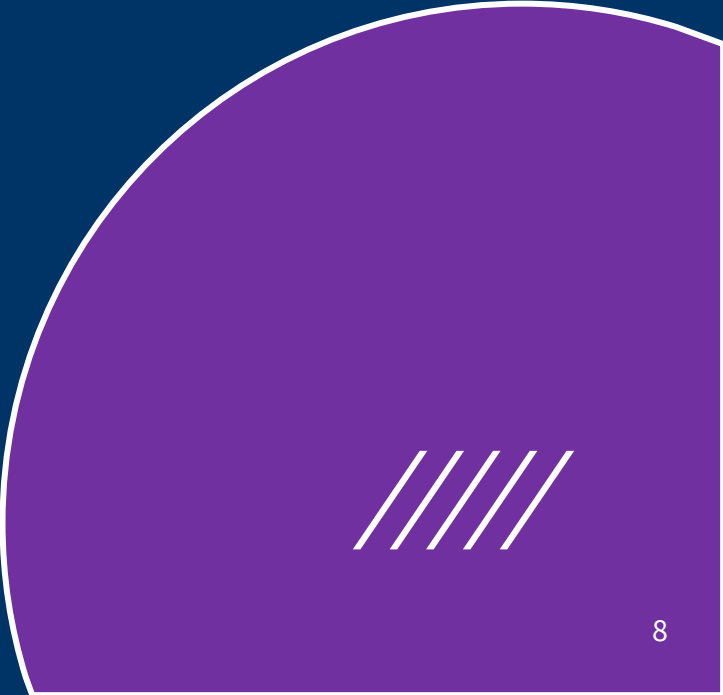
Questions to think about:

- Who are the players in the field?
- Who is using the final product?
- What does the agency need?
- When do they need it?
- Where/How will it be used?
- What can the potential vendor provide?



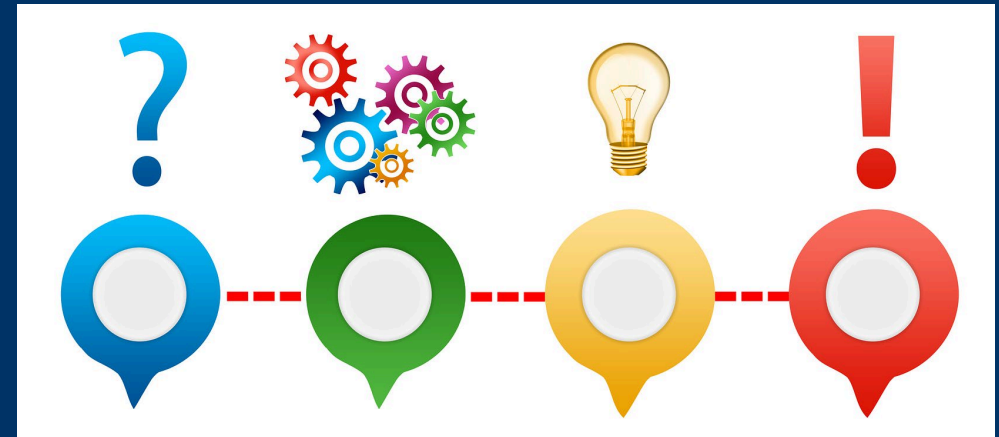


Questions?



Identifying Need – Determine What Is Needed

- Commodity Only?
- Services Only?
- Commodity with Services?
- How much is the Services Component?
- When is the commodity or service needed?



Identifying Need - Timeframe



- Existing contract deadline
 - Extension needed

- Roadmap/Schedule timeline*
 - Keeps an on-track deadline of each development stage
 - Time management and organization
 - Keeps a focus



* Handout available on [conference website](#).



Identifying Need



Is a Request for Information (RFI) needed? ([PRO-207](#))

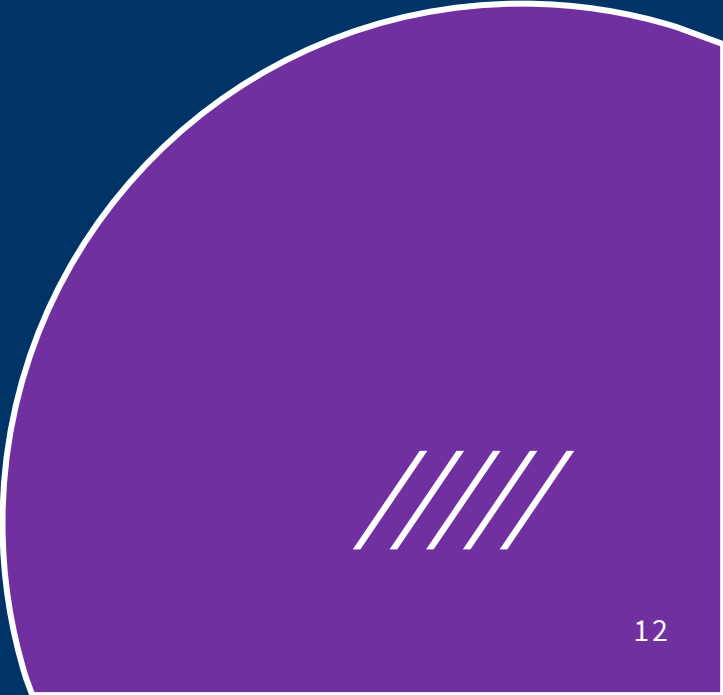
An RFI could:

- Increase the quality of the solicitation
- Improve Bidder engagement
- Help identify potential gaps in the requirements





Questions?





Procurement Strategy

How much is this going to cost?

Determine which method to use based on threshold level

Is an RFB or RFP needed?

Are there alternative procurement methods available?





Procurement Thresholds



Procurement Strategy – Bid vs Proposal

- Time
- What’s needed vs What can you do for me?

RFB	vs	RFP
Specifications	Request	Outcomes
Objective; yes/no; lowest cost	Response	Subjective; benchmarks met, cost is a factor
Lowest responsible bidder	Award	Evaluation Committee scores
Only with the lowest responsible bidder on price	Negotiation	Multiple proposers before award – BAFO process
3 – 6 months	Average Time	6 – 12 months



Procurement Strategy

Mandatory Contracts

- [VendorNet](#)

Piggyback Opportunities

- [VendorNet](#)
- [UW System](#)
- [UW Madison](#)
- [UW Milwaukee](#)
- [MN contracts](#)



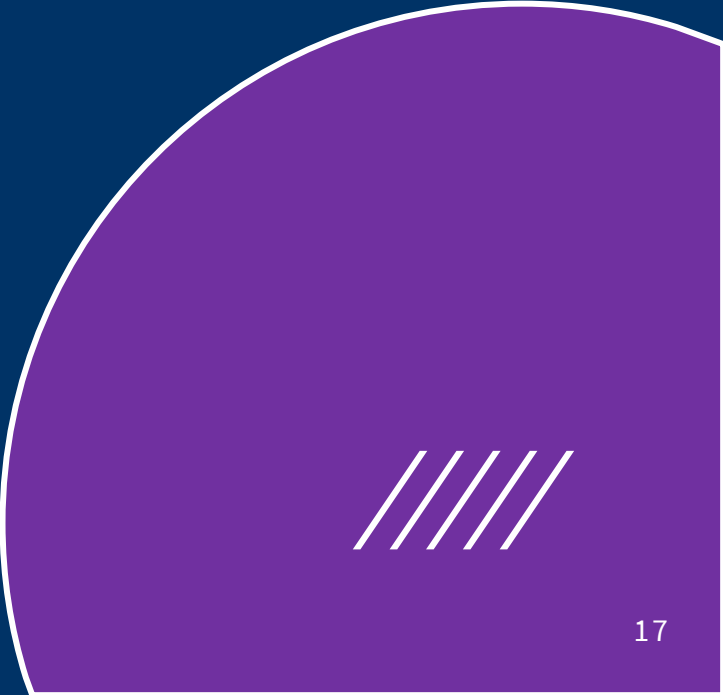
NASPO ValuePoint Contracts (<https://www.naspovaluepoint.org/portfolios/>)

- WI Participating Addendum (PA) required





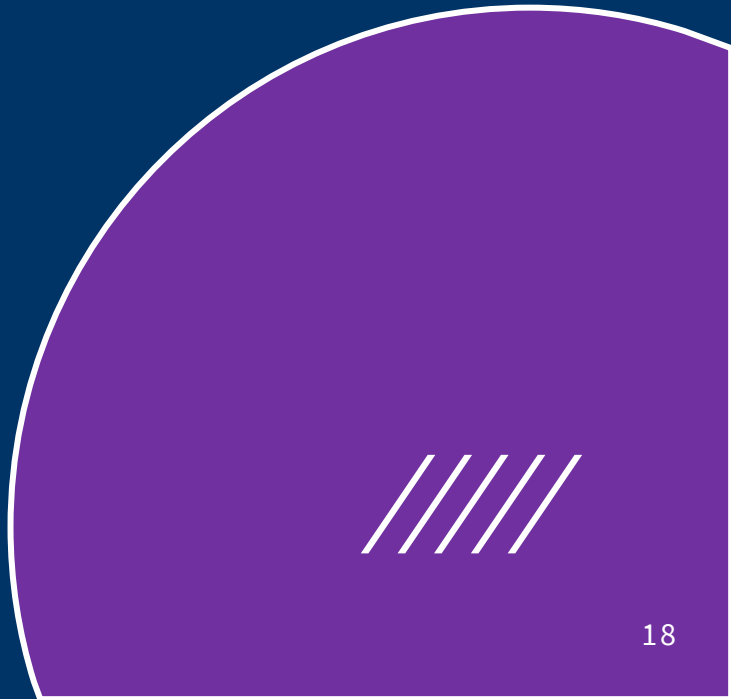
Questions?





Do you use market research when
buying a good or service?

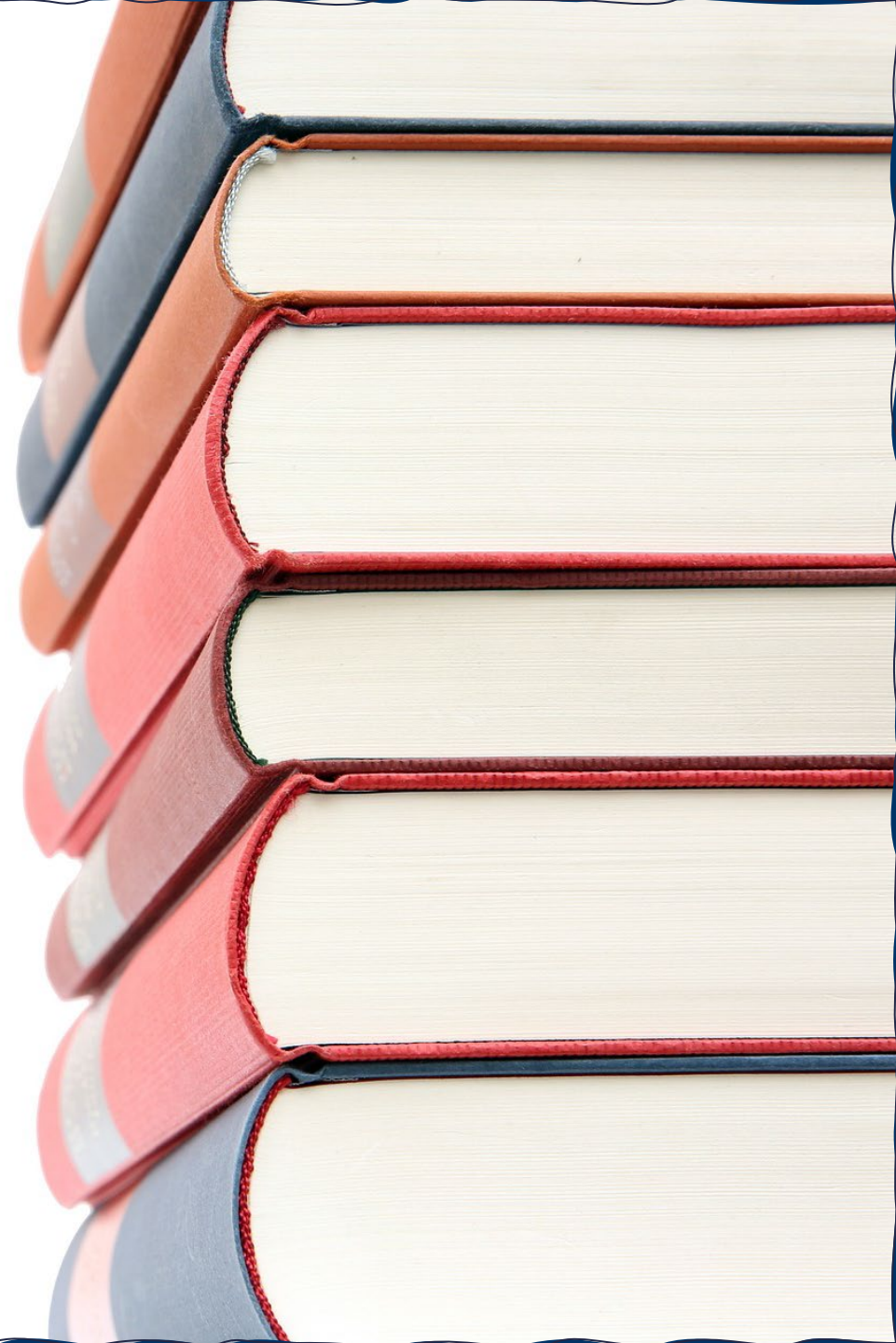
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Market Research - Definition

- Gathering pertinent data on products, suppliers, business practices, and analyzing data to make informed decisions
- A continuous process throughout the solicitation, negotiations, contract creation, and life of the contract



Market Research



Data
collection

Market
Conditions

Looking
For?



Market Research – Data Collection



Primary Research

(assists with identifying need)

- Interviews
- Surveys
- Focus groups

Secondary Research

(identifies vendors and contracting opportunities)

- Industry standards
- National organizations
- Trade publications
- Other state/federal solicitations





Market Research – Market Conditions

Competition Considerations

- Supply Chain Disruptions
- Reduced Competition



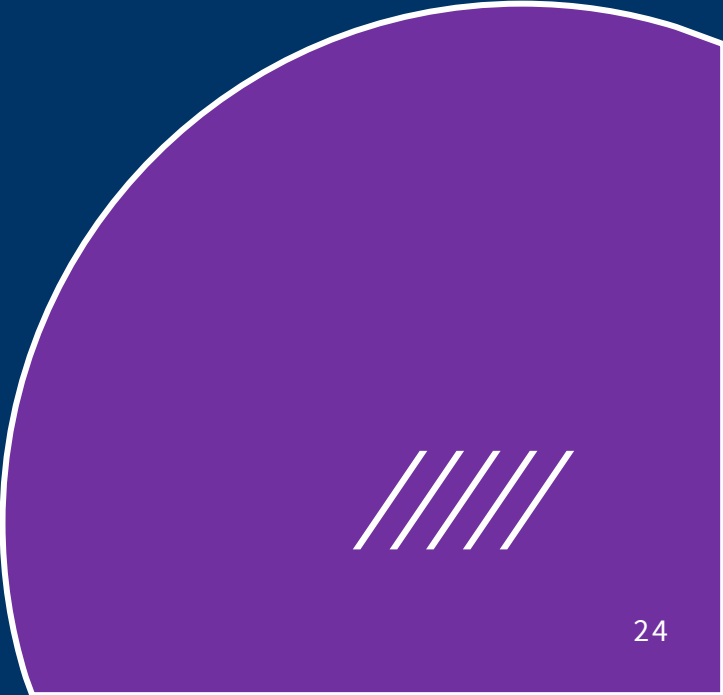
Market Research – Looking For

- Pricing
- Potential Vendors
- Possible Risks





Questions?





Bidder Outreach



Query from
STAR

DSPS
licensing site

Google

Think Outside
the Box

Pre-bid
Conference

MBE/DVB
Participation





Bidder Outreach

Query from STAR *(WI_SS_BIDDER_BY_NIGP)*

- [Research NIGP codes](#)

DSPS Site

- [License search](#)

Google

- Needs to be your friend



Think Outside the Box





Bidder Outreach – Pre-Bid Conference Needed?

- Held in advance of a solicitation release
- Allows for potential bidders/proposers to ask specific questions
- Develops vendor relations
- Increases competition
- Can generate savings
- Improve solicitation quality





Bidder Outreach – Encourage Certified MBE/DVB Participation

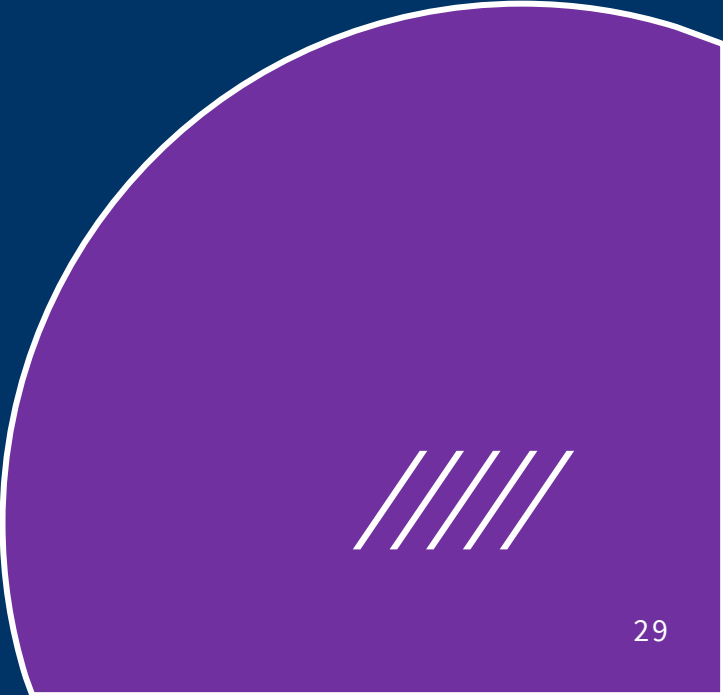
(5% preference)

- MBE (Minority-Owned) [WI Stat 16.287](#)
- DVB (Service-Disabled Veteran-Owned) [WI Stat 16.283\(3\)](#)
- WBE (Woman-Owned) [WI Stat 16.285](#)
- Search [WI Supplier Diversity Program](#)





Questions?





Best Practices

Prior solicitation(s); Amendments,
Q&A posted

Review Prior Bid/Proposal Responses

Notes from Creation; Reference
Checks; Administration Reviews

Protest/Appeal from Prior
Solicitations

Previous Contract Spend





Best Practices

Performance by Vendor

Any Grant/Federal Restrictions

Cost Sheet Development

Unit Pricing

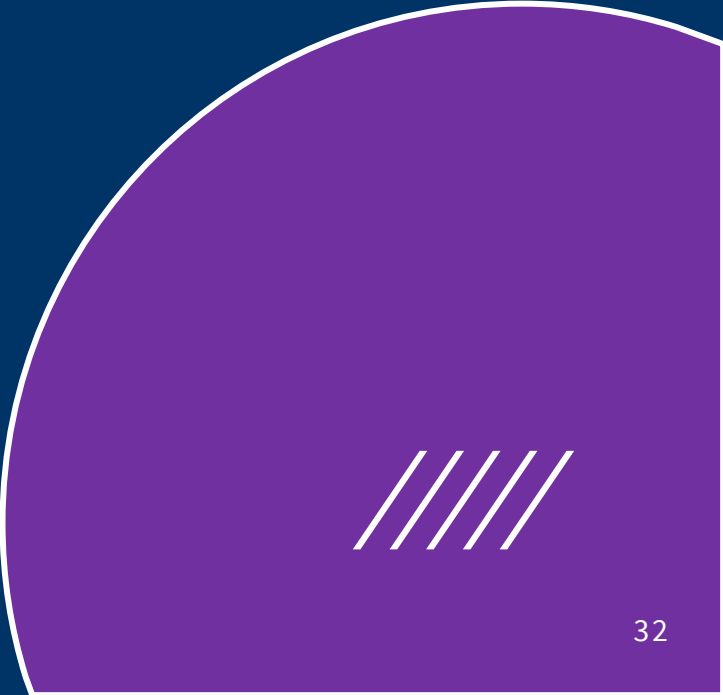
Grand Total

Market Basket





Questions?





Thank you for attending!

