

# Using Pre-Sourcing Methods to Your Advantage

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# Agenda

- Benefits of Pre-Sourcing Methods
- Request for Information
- Draft Request for Proposal (RFP)
- Records considerations
- Resources



# Pre-Sourcing Methods



# Benefits of Pre-Sourcing Methods

- Flexibility in structure to meet agency needs
  - Exceptionally detailed or more general
  - Optional steps such as demonstrations, presentations
- Create greater understanding of the market and potential vendors
  - New solicitations or contract renewals



# Benefits of Pre-Sourcing Methods

- Costs obtained can:
  - Determine whether agency budget is adequate
  - Ensure cost methodology aligned with market
- Results received can determine if requirements are too restrictive or vague
  - Enhance requirements in final solicitation
  - May reduce protests on the backend



# Types of Pre-Sourcing Methods

## Request for Information (RFI)

- May include general or specific questions specific to needs of the agency
- Posted in advance of a solicitation

## Draft Solicitation

- Draft solicitation posted for vendor feedback
- Feedback can be used to modify requirements

# Use Chat or Unmute Your Mic...



# Request for Information (RFI)





# Request for Information

- RFI **can:**
  - Aid in the development of a solicitation
  - Be used to obtain costs or price estimates
  - Be posted in Strategic Sourcing (RFI is its own Event Type)
- RFI **cannot:**
  - Be used as a substitute for a procurement process or establish a contractual commitment



# REQUEST FOR INFORMATION

## Business Continuity Software AD230982

Issued Date: May 31, 2023

Responses Due: June 29, 2023 by 1:00 PM CT



- This is not a bid or proposal.
- This Request for Information (RFI) is issued solely for information and planning purposes only and does not constitute a solicitation.
- Responses to the RFI shall not be returned.
- Responses to this RFI are not an offer and cannot be accepted by the State to form a binding contract.



# Typical RFI Components

Introduction  
and  
Background

Submission  
Instructions

Requirements

Pricing

# Introduction and Background

- Purpose of the RFI (problem statement)
- Explain how the responses will be reviewed/used
  - Develop solicitation requirements
  - Determine which vendors to invite for demonstrations
- Agency background
- Point of contact



# Submission Instructions

- Explain how to prepare and submit a response
- Calendar of events
- How vendors should ask questions (i.e., email, through system)
- Specific instructions for how to submit a response
  - Response format
  - Electronic only, hard copy only or either
  - Any response limitations (i.e., file size, page limit)



# Requirements

- Define any requirements the proposed solution must possess, if applicable
- Provide requirements vendor must respond to including:
  - Information on company/experience
    - Required references
  - Detailed information on proposed solution/service



# Pricing

- Can ask more general question about vendor's cost structure
- Can include specific line-item costs that the vendor must respond to

**Important note:** Forms and templates used to manage the request for bids/proposals process will not be used for the solicitation of information or cost estimates.



# Pricing Examples

## General

- Provide the pricing structure your company typically uses for this service
- Provide an overview of your organization's fee schedule

## Specific

- Provide pricing for each of the following:
  - Implementation
  - Licenses
  - Equipment
  - Training
- Provide a listing of any additional services your company may offer, with itemized pricing





# Review of RFI Responses

- Upon review agencies may:
  - Issue clarifications to vendors
  - Short list vendors to invite to presentations
  - Use the results to develop a solicitation
  - Look for existing contracts in which the vendors are participating
- Responses should be kept confidential until completion of the resulting solicitation (statement should appear on cover page)

# Recordkeeping Requirements

- Refer to [DOA-3840 Procurement Recordkeeping Checklist](#) for complete list. Main records include:
  - Original document and all attachments
  - Copy of all amendments
  - Vendor questions, answers and clarifications
  - Written correspondence with vendors
  - Other pertinent records



# Use Chat or Unmute Your Mic...

**How often have you completed a RFI?**

- **With every RFP**
- **Only with new RFPs**
- **Only with contract renewals**
- **I've never completed a RFI**

# Draft Solicitation



# Use Chat or Unmute Your Mic...



# Draft Solicitation

- Agencies may post a draft of an upcoming solicitation
- Allows agencies to obtain input from vendors on the documents
- Allows vendors to determine their ability to respond
- Revisions made following feedback process can enhance requirements and specifications to better align with industry
- Incorporation of feedback may decrease likelihood of protest of the requirements



# Draft Solicitation Components

- Solicitation and all associated documents should be as close to final as possible when posting
- Agencies can use Strategic Sourcing to post the draft – must be clear it is only a draft
- Include a letter or memo instructing vendors:
  - Type of input you are seeking
  - Deadline for responses
  - Clear instructions on how to submit



# Requested Input

- Use the memo to request that proposers identify any of the following:
  - Restrictive requirements
  - Requirements that could dramatically increase costs to the agency
  - Duplicative requirements
  - Missing requirements that may be necessary to ensure agency receives best possible results
  - State-specific information that would preclude proposers from responding to the RFP





# DRAFT RFP Memo



## STATE OF WISCONSIN DEPARTMENT OF ADMINISTRATION

Tony Evers, Governor  
Kathy Blumenfeld, Secretary  
Jana Steinmetz, Administrator

April 12, 2022

The State of Wisconsin is seeking input from potential Proposers for the upcoming release of its Request for Proposal (RFP) for Network Managed Services for Education.

Prior to releasing the RFP, the State is publishing a draft version of the main RFP document (Proposal Requirements), the associated technical requirements (Functional Specifications) and the Cost Proposal to offer interested parties an opportunity to provide the State with comments on the draft documents, and to provide potential proposers, an opportunity to determine their ability to respond to the final RFP. Not all attachments and appendices are finalized and available for review as part of this draft process however there is a list of such documents included in the RFP.

Specifically, the State would like input from the vendor community identifying the following:

1. Restrictive requirements/specifications (e.g., anything that could preclude all potential Proposers from responding affirmatively)
2. Timelines which may impact the ability of a vendor to respond
3. Requirements/specifications which are not understandable or clear
4. Requirements/specifications which could cause dramatically increased costs to the State
5. State definitions/diagrams of communication topologies which differ from industry standards
6. Requirements/specifications that may have been overlooked but may be deemed necessary by the industry to ensure the State receives the best possible results from the RFP process
7. Response requirements that may impact the ability of a vendor to provide information needed to evaluate a proposal
8. Information that is either missing or deficient from Attachment 6 – Cost Proposal Workbook which could preclude potential Proposers from providing complete and cost-effective pricing
9. State-specific information that is either missing or deficient to a level that would preclude potential Proposers from responding to the RFP itself or in a complete and cost-effective manner

Comments and input regarding the draft RFP should be as follows:

- Comments due no later than **Tuesday, April 26, 2021, 2:00 PM, CT.**
- Comments must be returned electronically to [patrick.muir1@wisconsin.gov](mailto:patrick.muir1@wisconsin.gov)
- Responses shall be organized and presented in the order and by the numbers assigned in the draft RFP using the attached document entitled "Comment Form, RFP AD230953 DRAFT"

Many thanks in advance for your time and effort in assisting the State of Wisconsin in putting together a clear and concise final RFP. We look forward to receiving your input.

Kind regards,

Patrick Muir  
State Bureau of Procurement



**DRAFT RFP FOR NETWORK MANAGED SERVICES FOR EDUCATION**

The State of Wisconsin is seeking input from potential Proposers and stakeholders for the upcoming release of its Request for Proposal (RFP) for Network Managed Services for Education. Prior to releasing the RFP, the State is publishing a draft version of the document and a number of associated documents to offer interested parties an opportunity to provide the State with input on the draft documents, and for potential vendors, an opportunity to determine their ability to respond to the final RFP. Additional details and instructions for responding to the draft RFP are included in attached documents below.

Submit comments in response to this RFI (Draft RFP) using the Proposer Comment Form available within the supporting documents, and send via email directly to [patrick.muir1@wisconsin.gov](mailto:patrick.muir1@wisconsin.gov)

SOLICITATION INFORMATION	AGENCY CONTACT INFORMATION
Event Number: 12242	Name: Patrick Muir
Event Status: Closed/Under Review	Email: <a href="mailto:patrick.muir1@wisconsin.gov">patrick.muir1@wisconsin.gov</a>
Solicitation Reference #: DRAFT RFP #AD230953	Phone: 608/266-8613 Phone Ext.:
Agency: Department of Administration	Fax:
Available Date: 04/12/2022	
Response Due Date: 04/26/2022 at 2:00PM	

**DOCUMENT DOWNLOADS**

Main Document



All Documents

Response due date has passed. Responses are no longer being accepted

**SUPPORTING DOCUMENTS**

Cover Letter - RFP_AD230953 DRAFT Review	04/12/2022 9:46:22AM
Comment Form - RFP AD230953 DRAFT	04/05/2022 8:48:57AM
Attachment_5_Functional Specifications and Technical Metrics Compliance Matrix	04/08/2022 10:41:01AM
Attachment_6_Cost Proposal Workbook	04/08/2022 10:41:01AM
Appendix_A_Site List v2 with Zip Codes	04/15/2022 7:46:24AM

**QUESTIONS & ANSWERS**

No questions have been answered yet

**NIGP CODES**

View All    First 1-3 of 3 Last	
NIGP Code	Description
91551	Information Highway Electronic Services (Internet, Ethernet,
92037	Networking Services (Including Installation, Security, and M
95889	Telecommunications Management Services

# DRAFT RFP Posting

# Questions



# Thank you!

Cheryl Edgington

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