

STAR Strategic Sourcing: Ensuring the Best Data, Coming and Going

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Agenda

- New Developments in Strategic Sourcing from STAR!
- Simplified Bids
- Putting Good Information In
- Getting Good Information Out



New Developments in Strategic Sourcing from STAR!

Queries
Available in SS

New View as
Evaluator option

Simplified Bids

Do you find that you need to conduct the same Simplified Bid every fiscal year or two without substantial changes?



















- Simplified Bids through Strategic Sourcing may simplify your Simplified Bidding process
 - Two Options:
 - 1) All Bidders
 - 2) Selection of a minimum of three registered Bidders
 - If known vendors are not registered in eSupplier, encourage them to register!



Putting Good Information In

Did you know you can clone old events?

- Great for rebids
- Best used on solicitations built in the system
- Copies:
 - Title, Synopsis, NIGP Codes, Main Doc, Bid Factors, Scoring Criteria
- Does not copy:
 - Event Dates, Administrative Docs, or Event Security

View History	Scoring Results	Q & A	Cancel	Copy
				
				
				
				
				
				

Putting Good Information In

Sourcing Event Workbench

▼ **Search Criteria**

Business Unit Available From Date To Date

Event Number Response Due Date From End Due Date

Event Type **Request for Bid** ▼

Event Status

Solicitation Reference #

Title **snow**

Created By

NIGP Filter ? NIGP Codes

Search Mode: **Posted - including others** ▼

Search Results Personalize | Find | | First 1-20 of 20 Last

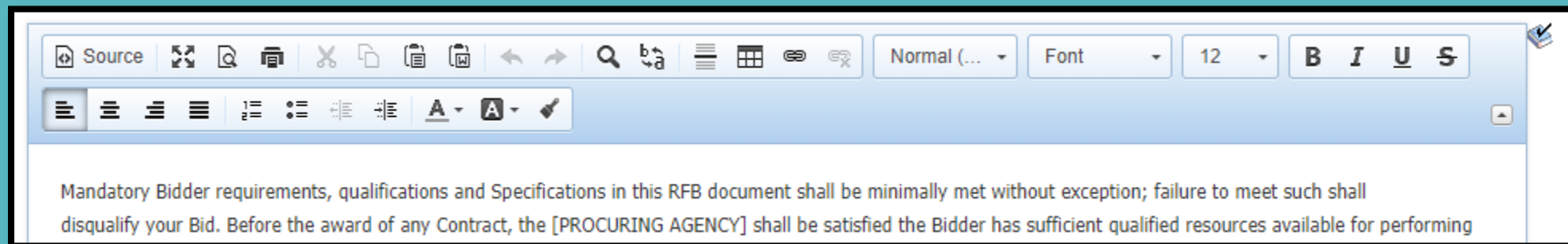
Business Unit	Event Number	Solicitation Reference #	Event Type	Event Status	Title	Available Date	Response Due Dt	View History	Copy
46500	12481	MA230978	Request for Bid	Closed/Under Review	Madison Snow and Ice Removal	10/10/2022	10/25/2022		
50500	12461	AD230976	Request for Bid	Closed/Under Review	SNOW AND ICE REMOVAL SERVICES	09/19/2022	10/10/2022		
50500	12459	AD230975	Request for Bid	Closed/Under Review	SNOW AND ICE REMOVAL SERVICES	09/19/2022	10/04/2022		
39500	12330	510476	Request for Bid	Closed/Under Review	Green Bay DMV/DTSD Snow Removal	05/23/2022	06/14/2022		
39500	11770	510410	Request for Bid	Award Phase	Superior Snow Removal	04/02/2021	04/21/2021		



Putting Good Information In

Tips for formatting and organizing your text when building in Strategic Sourcing:

- Don't nest numbered or bulleted lists
- If you need a table, make sure you use the tools to insert one; don't paste it in.
- Be mindful of spacing between sections
- Download a PDF copy for review before posting



Putting Good Information In

- Scoring Criteria and Benchmarks - Adjusting the scoring scale for your needs
- Scoring by Total Only

Scoring Parameters						
Rating Scale:	900	Total Points:	1000	<input type="button" value="Distribute"/>	<input type="button" value="Calculate"/>	<input type="button" value="Clear/Start Over"/>
Point Assignment						
Section Title			Lock by	Points	Percent	
2 Attachment 3 Cost Sheet	\$: <input checked="" type="checkbox"/>	<input type="checkbox"/>	Points	100	10	
6 Responses to General Requirements and Contract Implementation (Scored Sections)	\$: <input type="checkbox"/>	<input type="checkbox"/>	No	900	90	

Putting Good Information In

Scoring Questions Individually

Section Title	\$:	*Lock by	Points	Percent
5 ORGANIZATIONAL QUESTIONS (600 POINTS)	<input type="checkbox"/>	No	600	32
5.1 PROPOSER BACKGROUND	<input type="checkbox"/>	Points	100	17
5.2 PROPOSER CAPACITY	<input type="checkbox"/>	Points	200	33
5.3 RESPONDING TO VOLUME CHANGES	<input type="checkbox"/>	Points	200	33
5.4 RELATIONSHIP MANAGER	<input type="checkbox"/>	Points	50	8
5.5 STAFF QUALIFICATIONS	<input type="checkbox"/>	Points	50	8
6 TECHNICAL QUESTIONS (850 POINTS)	<input type="checkbox"/>	No	850	45
6.1 IMPLEMENTATION	<input type="checkbox"/>	No	150	18
6.1.1	<input type="checkbox"/>	Points	100	67
6.1.2	<input type="checkbox"/>	Points	50	33
6.2 OPERATIONS	<input type="checkbox"/>	No	500	59
6.2.1	<input type="checkbox"/>	Points	50	10
6.2.2	<input type="checkbox"/>	Points	50	10
6.2.3	<input type="checkbox"/>	Points	50	10
6.2.4	<input type="checkbox"/>	Points	200	40
6.2.5	<input type="checkbox"/>	Points	100	20
6.2.6	<input type="checkbox"/>	Points	50	10
6.3 EXCEPTION PROCESSING	<input type="checkbox"/>	No	200	24
6.3.1	<input type="checkbox"/>	Points	75	38
6.3.2	<input type="checkbox"/>	Points	75	38
6.3.3	<input type="checkbox"/>	Points	50	25
7 COST PROPOSAL (450 POINTS)	<input checked="" type="checkbox"/>	Points	450	24



Putting Good Information In

Finalize Award Decision

Filter by

Personalize | Find | | First 1-4 of 4 Last

Award Decision	Awarded Amount	Comments
No Action Taken <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>
Disallow <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>
Reject <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>
Award <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>

Don't award your event or "Finalize Award Decision" until after the protest period has expired and all protests have been resolved.



Getting Good Information From Bidders

Response Required

Show to Bidder

Pass/Fail

Include in Scoring








Bid factors are how you get information from Bidders. How many bid factors do you need and how will you use them?






- Response Required vs. Optional
- Show to Bidder vs. Not Shown
- Include in Scoring vs. Not Scored

Which types of Bid factors are best for your needs?

Most Commonly Used:

- Attachment type
- Yes/No
- List

Evaluation Status	View	Reject	Exceptions	Email Bidder
Reviewed/Pass				
Reviewed/Pass				

SECTION #	TITLE	VIEW RESPONSE
1	GENERAL INFORMATION	
2	PREPARING AND SUBMITTING A PROPOSAL	
3	PROPOSAL SELECTION AND AWARD PROCESS	
4	MANDATORY REQUIREMENTS	
4.4	PROPOSER QUALIFICATIONS	

Getting Good Information From Bidders

Which type of Bid factors is best for your needs? Special Cases

- Cost Sheet is a streamlined way to get one/a few prices when there no formulas or calculations are involved
- Text/Long Text is Plain text, cannot be formatted
- Date and Number

Cost Sheet Parameters

Step 1: Define Size of Cost Sheet

Columns 2 (max 6 columns)
Rows 3

Step 2: Column Setup

Column 1	Column 2	Locked	Type
Header			
Item		<input checked="" type="checkbox"/>	Text

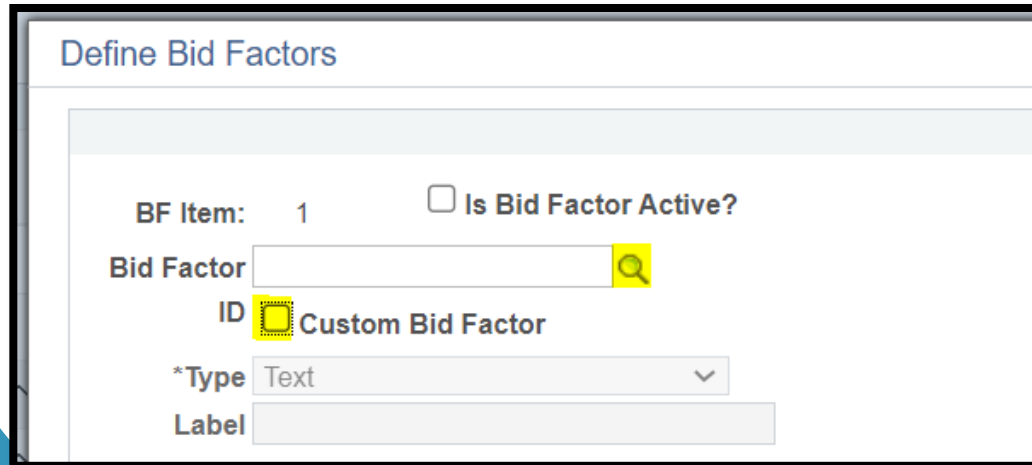
Cost Sheet

Service	Cost
Monthly Cleaning Cost	0.00
Monthly Day Porter Cost	0.00
Total Monthly Costs	0.00

Getting Good Information From Bidders

Did you know Strategic Sourcing has a Library of Bid Factor Templates?

- Can be used as found, or used as a base from which to customize



Define Bid Factors

BF Item: 1 Is Bid Factor Active?

Bid Factor

ID

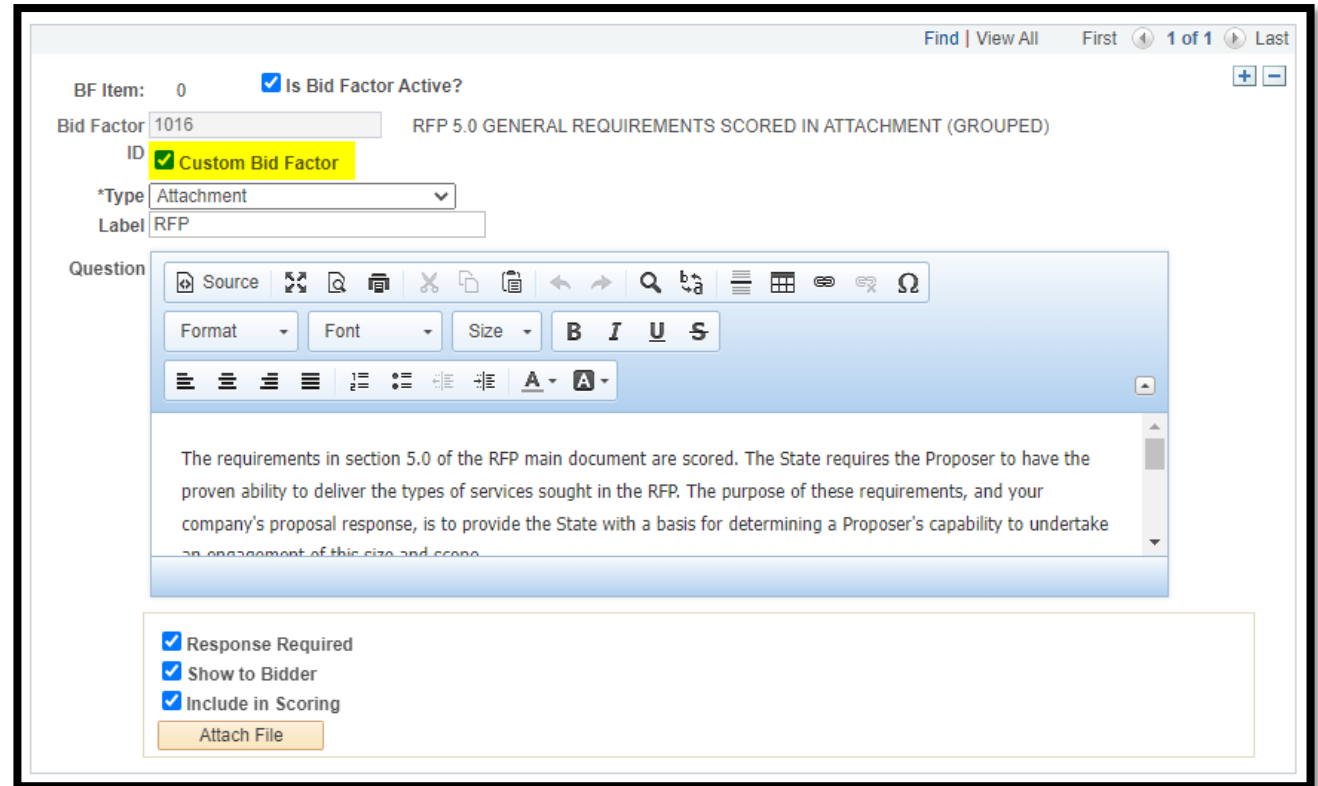
*Type

Label

Bid Factor ID	Bid Factor Title	Type
1000	RFB 5.0 PRICING CONFIRMATION AND AGREEMENT	Yes/No
1001	RFB 1.0 INTRODUCTION ACKNOWLEDGEMENT	Yes/No
1002	RFx RESPONDING TO MANDATORY REQUIREMENTS	Yes/No
1003	RFB 2.0 BIDDER QUALIFICATIONS AND REQUIREMENTS (GROUPED)	Yes/No
1004	RFB 3.0 MANDATORY SPECIFICATIONS OF BID (GROUPED)	Yes/No
1005	RFx SPECIAL TERMS AND CONDITIONS (INTRO/ACKNOWLEDGEMENT)	List
1006	RFB 6.0 BID PROCEDURE ACKNOWLEDGEMENT (GROUPED)	Yes/No
1007	RFB 7.0 BID ACCEPTANCE AND AWARD (GROUPED)	Yes/No
1008	RFx FEDERAL DEBARMENT	List
1009	RFP 1.0 GENERAL INFORMATION ACKNOWLEDGEMENT (GROUPED)	Yes/No
1010	RFx PROCUREMENT MANAGER CENTRAL POINT OF CONTACT	Yes/No
1011	RFx NEWS RELEASES	Yes/No
1012	RFP 2.0 PREPARATION AND SUBMITTAL ACKNOWLEDGEMENT (GROUP)	Yes/No
1013	RFP COST PROPOSAL SUBMITTAL ACKNOWLEDGEMENT	Yes/No
1014	RFP 3.0 SELECTION AND AWARD ACKNOWLEDGEMENT (GROUPED)	Yes/No
1015	RFP 4.0 MANDATORY REQUIREMENTS ACKNOWLEDGEMENT (GROUPE	Yes/No
1016	RFP 5.0 GENERAL REQUIREMENTS SCORED IN ATTACHMENT (GROUPI	Attachment
1017	RFP 5.0 GENERAL REQUIREMENTS (ACKNOWLEDGEMENT ONLY; EACH	Yes/No
1018	RFP 6.0 TECHNICAL REQUIREMENTS (ACKNOWLEDGEMENT ONLY; EA	Yes/No
1019	RFB 2.0 BIDDER QUALIFICATIONS/REQUIREMENTS (ACKNOWLEDGEME	Yes/No
1020	RFB 3.0 MANDATORY SPECIFICATIONS OF BID (ACKNOWLEDGEMENT (Yes/No
1021	RFP 7.0 COST PROPOSAL	List

Getting Good Information From Bidders

After selecting a Bid Factor from Template, you can customize it to your liking.



The screenshot displays a web-based configuration interface for a Bid Factor. At the top right, there are navigation links: "Find | View All", "First", "1 of 1", and "Last". Below this, the "BF Item" is set to "0" and "Is Bid Factor Active?" is checked. The "Bid Factor ID" is "1016" and the description is "RFP 5.0 GENERAL REQUIREMENTS SCORED IN ATTACHMENT (GROUPED)". The "ID" field is highlighted in yellow and contains the text "Custom Bid Factor". The "*Type" is set to "Attachment" and the "Label" is "RFP".

The "Question" field contains a rich text editor with a toolbar including options for Source, Format, Font, Size, Bold (B), Italic (I), Underline (U), Strikethrough (S), and text color. The text in the editor reads: "The requirements in section 5.0 of the RFP main document are scored. The State requires the Proposer to have the proven ability to deliver the types of services sought in the RFP. The purpose of these requirements, and your company's proposal response, is to provide the State with a basis for determining a Proposer's capability to undertake an engagement of this size and scope."

At the bottom, there are three checked checkboxes: "Response Required", "Show to Bidder", and "Include in Scoring". An "Attach File" button is located below these options.



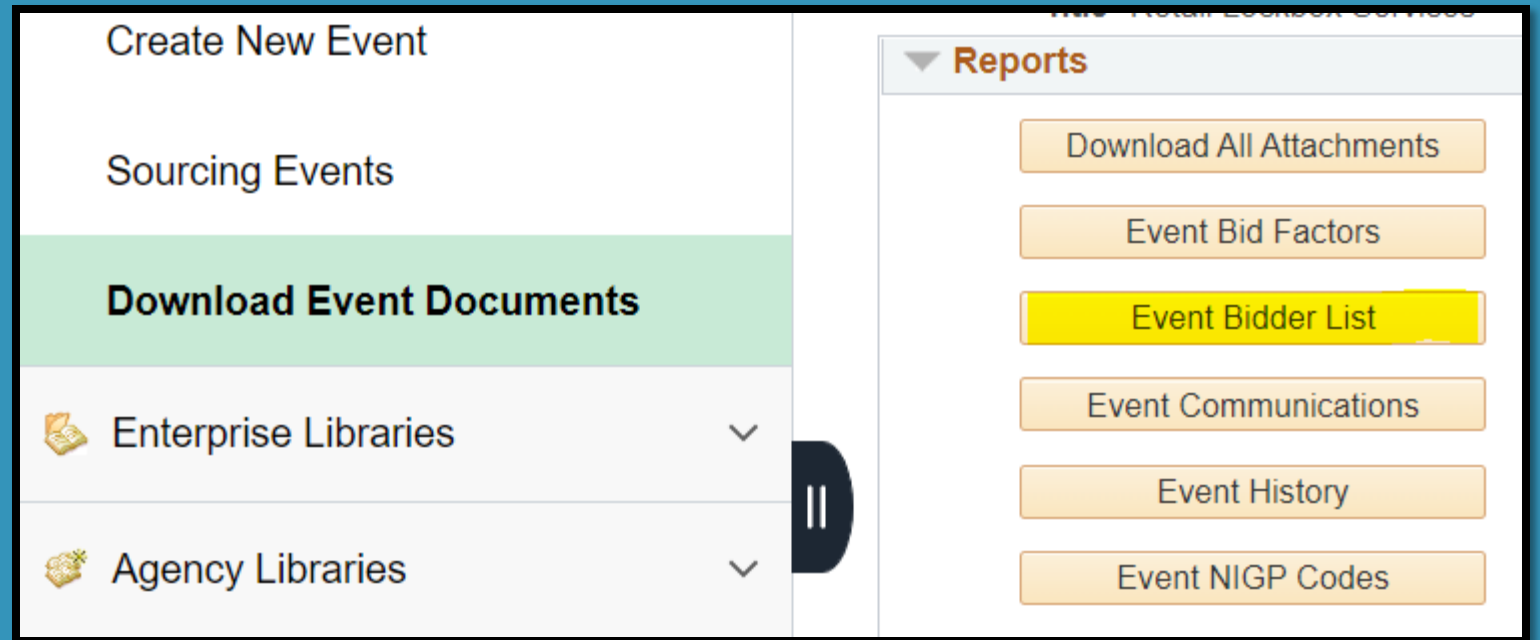
Use Chat or Unmute Your Mic...



Getting Good Information Out

Download Events Docs

- How do I download the list of Bidders who were notified at the time of event posting?



The screenshot displays a software interface for event management. On the left, a vertical menu contains the following items: 'Create New Event', 'Sourcing Events', 'Download Event Documents' (highlighted in green), 'Enterprise Libraries' (with a folder icon and a dropdown arrow), and 'Agency Libraries' (with a folder icon and a dropdown arrow). On the right, a 'Reports' section is visible, containing several buttons: 'Download All Attachments', 'Event Bid Factors', 'Event Bidder List' (highlighted in yellow), 'Event Communications', 'Event History', and 'Event NIGP Codes'.

Getting Good Information Out

Download Events Docs

- View when bidders were registered to find out how effective your bidder outreach is.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Bidder	Company	Email ID	Veteran Own	Small Busie	MBE	Disabled Ve	WBE	NIGP Match	Country	Address 1	Address 2	City	State	Postal	Bidder ID Created
850	0000013558	Healing Wit	augbomeh@	N	Y	Y	N	N	91800	USA	670 Meridian Way #295		Westerville	OH	43082	9/3/2024 9:55
851	0000013575	Sansar Tec	tony@sansar	N	Y	N	N	Y	91800	USA	204 White Horse Pike		Haddon Heig	NJ	08035	9/5/2024 14:26
852	0000013591	DIOSS LLC	dmontecillc	N	N	N	N	N	91800	USA	1050 East Fla S107 #1635		Las Vegas	NV	89119-7427	9/10/2024 12:03
853	0000013597	Saige Inc	contact@sa	N	N	N	N	N	91800	USA	430 Park Ave	14th Floor	New York	NY	10022	9/11/2024 15:15
854	0000013611	Zimba Hou:	hello@zimb	N	Y	Y	N	Y	91800	USA	1942 Big Bend Drive		Neenah	WI	54956	9/14/2024 10:51
855	0000013622	Moat Resea	zeeshan.gh	N	Y	Y	N	N	91800	USA	1309 Coffeen Avenue STE 12		Sheridan	WY	82801	9/18/2024 12:37
856	0000013634	Tim McMur	Timothy_mc	N	N	Y	N	N	91800	USA	6904 N 41st Street		Milwaukee	WI	53209	9/20/2024 10:45
857	0000013657	Falcon Corr	amartin@fa	N	Y	Y	N	Y	91800	USA	155 N. Wacke	Suite 4250	Chicago	IL	60606	9/26/2024 11:22
858	0000013689	University c	maul2@wis	N	N	N	N	N	91800	USA	1025 W Johnson St		Madison	WI	53706	10/3/2024 14:41
859	0000013697	Kimley-Hor	brian.kizer@	N	N	N	N	N	91800	USA	500 E. 96th St	Suite 300	Indianapolis	IN	46240	10/7/2024 14:56
860	0000013702	CBRE, Inc.	randal.daw	N	N	N	N	N	91800	USA	321 North Cl	34th Floor	Chicago	IL	60654	10/8/2024 7:27
861	0000013704	CBRE, Inc.	randal.daw	N	N	N	N	N	91800	USA	321 North Cl	34th Floor	Chicago	IL	60654	10/8/2024 10:39
862	0000013721	Milliman	jill.brostow	N	N	N	N	N	91800	USA	17335 Golf P	Suite 100	Brookfield	WI	53045	10/11/2024 9:46
863	0000013730	Willis Towe	tim.kolgen@	N	N	N	N	N	91814	USA	2365 Northsi	Suite 400	San Diego	CA	92108	10/15/2024 15:18
864																

Use Chat or Unmute Your Mic...



Getting Good Information Out

Download Events Docs

- How do I download the list of bid factor responses?

The screenshot displays a software interface with a left-hand navigation menu and a main content area. The navigation menu includes the following items: 'Event Development' (with an upward arrow), 'Create New Event', 'Sourcing Events', 'Download Event Documents' (highlighted in green), 'Enterprise Libraries' (with a downward arrow), 'Agency Libraries' (with a downward arrow), 'Response Management' (with a downward arrow), and 'Scoring & Awarding' (with a downward arrow). A blue vertical bar with two white vertical lines is positioned to the right of the 'Enterprise Libraries' and 'Agency Libraries' items. The main content area is titled 'Reports' and contains a list of report buttons: 'Download All Attachments', 'Event Bid Factors', 'Event Bidder List', 'Event Communications', 'Event History', 'Event NIGP Codes', 'Event Q&A' (disabled), 'Event Users', 'Bidder Response Summary' (crossed out with a red line), 'Bidder Responses' (highlighted in yellow), 'Single Bidder Response' (with a search input field), and 'Score Summary'.

Getting Good Information Out

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains several menu items: 'Event Development' (with an upward arrow), 'Create New Event', 'Sourcing Events', 'Download Event Documents' (highlighted in green), 'Enterprise Libraries' (with a downward arrow and a blue pause button), 'Agency Libraries' (with a downward arrow), 'Response Management' (with a downward arrow), 'Scoring & Awarding' (with a downward arrow), and 'Reporting & Auditing' (with a downward arrow). The main content area displays a 'Reports' dropdown menu with the following options: 'Download All Attachments' (highlighted in yellow), 'Event Bid Factors', 'Event Bidder List', 'Event Communications', 'Event History', 'Event NIGP Codes', 'Event Q&A' (disabled), 'Event Users', 'Bidder Response Summary', 'Bidder Responses', 'Single Bidder Response' (with a search input field and a magnifying glass icon), and 'Score Summary'.

Download Events Docs

- How do I download the complete solicitation record for an open records request?

Getting Good Information Out



Approve	Evaluate	Update	View	Author
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Consider giving another person **Edit Access** to your event (**not just View Access**)

- For someone else to act as back-up to make updates if you are out of office
- For others to view/access records in case of an open records request
- For others to take over in case you leave your position

Getting Good Information Out

CC Communication Checkbox

- When the Author (person who created the event) is no longer the primary point of contact
- This is intended for replacement, not as a supplement to the Author

Agency Contact		
Name:	Kristina Harris	
Email:	kristina.harris@wisconsin.gov	<input checked="" type="checkbox"/> CC Communication
Phone:	608/266-2313	Phone Ext.: Fax:

Use Chat or Unmute Your Mic...





Getting Good Information Out

Queries!

- All queries that pull data from Strategic Sourcing start with “WI_SS_” so if you use that as a search term, you can browse them all!

WI_SS_BIDDER - Is the bidder registered in SS

NIGP Code  

Company Name-Use% for wildcard

Email ID

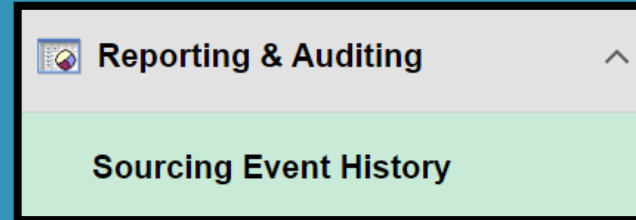
WAMS ID

[View Results](#)

WI_SS_BIDDER	Is the bidder registered in SS
WI_SS_BIDDER_BY_NIGP	Bidder by NIGP code
WI_SS_BIDDER_EVENT_RESPONSES	Bidder - Event Responses
WI_SS_CNV_001	
WI_SS_EVENTS_BY_CRITERIA	Events by BU, status, type
WI_SS_EVENTS_BY_DATE_RANGE	Events by Date Range
WI_SS_EVENTS_STATUS_CHANGES	Event Status changes by date r
WI_SS_EVENT_AUDIT_HISTORY	Sourcing Event History
WI_SS_EVENT_BIDDER_LIST	Event Bidder List
WI_SS_EVENT_BIDR_COMMUNICATION	Event Bidder Communications

Getting Good Information Out

View Event History



Generate Document	WIGUESTSUPPLIER	WIGUESTSUPPLIER	06/29/2021 07:14	Event document generated
Generate Document	WIGUESTSUPPLIER	WIGUESTSUPPLIER	06/29/2021 07:16	Event document generated
Generate Document	WIGUESTSUPPLIER	WIGUESTSUPPLIER	06/29/2021 09:58	Event document generated
Email Notification	WAMS_HEYGREGMILLER	Moody's Analytics, Inc.	06/29/2021 10:58	Email Notification - BIDDER_EVENT_SUBMISSION
Email Notification	WAMS_HEYGREGMILLER	Moody's Analytics, Inc.	06/29/2021 10:58	Email Notification - SS_EVENT_BIDDER_RESP_SUBM
Email Notification	WAMS_ASHLEYIHSMARKIT	IHS Global Inc	06/29/2021 11:49	Email Notification - SS_EVENT_BIDDER_RESP_SUBM
Email Notification	WAMS_ASHLEYIHSMARKIT	IHS Global Inc	06/29/2021 11:49	Email Notification - BIDDER_EVENT_SUBMISSION
Event Closed / Under Review	WI_BATCH_FN	Star Batch Process.	06/29/2021 13:01	Event status updated to 06 - Closed / Under Review
Email Notification	WI_BATCH_FN	Star Batch Process.	06/29/2021 13:01	Email Notification - SS_EVENT_CLOSED_UNDER_RE



What Questions Do You Have That We Didn't Cover?



Questions

Contact us with questions!

DoaWisPro@wisconsin.gov and STARSupport@wisconsin.gov

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608.261.8747



Thank you for coming!

Check out the eLearnings for Strategic Sourcing on Leader/Cornerstone:

- [PRO308: Introduction to Strategic Sourcing](#)
- [Creating a Strategic Sourcing Event](#)
- [Scoring and Awarding Strategic Sourcing Events](#)
- [Understanding the RFI Process eLearning](#)
- Coming Soon - *Making STAR's Strategic Sourcing Module Work for You*

