

# PROCUREMENT INFORMATION MEMORANDUM

**Date Issued:** September 12, 2017

**Number:** 17-005

**Effective Dates:** Date Issued Until Modified or Retired

**Subject:** Strategic Sourcing Naming Conventions – Templates, Library Items and Bid Factors

**I. REFERENCE:**

Wis. Stats. 16.701(1m)

**II. SCOPE:**

Beginning September 12, 2017, state agencies will use STAR Strategic Sourcing to post and manage sourcing events. During event creation, agencies should use enterprise templates, text library items and bid factors to the extent possible.

The State Bureau of Procurement (SBOP) has created the following enterprise templates:

- ENT\_RFP\_TEMPLATE
- ENT\_RFB\_TEMPLATE

As additional enterprise templates are created, they will be posted to STAR Strategic Sourcing.

SBOP has updated many bid factors and they are represented in the new enterprise templates. Agencies are strongly encouraged to use the enterprise templates when creating sourcing events. Agencies can also create agency-specific templates, library items and bid factors. To ensure consistency across the enterprise, SBOP has established some standard naming conventions for use by all state agencies who will post and manage sourcing events in STAR.

**III. PROCEDURES AND RESOURCES:**

**A. Templates**

Template naming conventions should follow the standards outlined below:

Business Unit	Template Type	Procurement Type	Description
-ENT -CAPS -AGENCY (Use three-digit Business Unit)	-GEN (General Topic) -SVC (Services) -COMM (Commodities) -IT (Information Technology) -PRNT (Print) -VEH (Vehicles)	-RFP -RFB -RFx -SIMP BID	Agency discretion

Example: ENT\_SVC\_RFP\_CONSULTING  
CAPS\_PRNT\_SIMP BID



## 410\_IT\_RFB\_HARDWARE

As agencies identify the need for additional template types, SBOP will update the PIM.

### B. Text Library Items

Text Library Items should include a designation of the sourcing event (RFP/RFB/Simp Bid/RFI) followed by an underscore and then a description of the section.

Example: RFP\_CONTRACT NEGOTIATION

### C. Bid Factors

Bid Factors that are specific to a sourcing event type should begin with either RFB or RFP. Bid factors that are used in both event types (i.e. Reasonable Accommodations) should begin with RFX. The event designation is followed by the number identifying the section and a description of the section the bid factor relates to.

Example: RFB 1.0 INTRODUCTION ACKNOWLEDGEMENT

Example: RFX NEWS RELEASES

**Important Note:** All Bid Factor titles should begin with the event type as there is not currently a way to group them by event type in the system. Bid factors will appear in the sourcing document exactly as they are titled. Agencies will need to delete the event type from the Bid Factor title to ensure it does not appear in the final sourcing document.

**Important Note:** When building your template, be sure to check that the numbering on your bid factor aligns with the appropriate section in your sourcing event.

## IV. ADDITIONAL INFORMATION:

- A. For more information on creating templates, text library items and bid factors, Job Aids are available through STAR Connection (<http://starconnection.wi.gov>) through the navigation: Resources > STAR Training Resources (scroll down the page to find this) > ELM Job Aids > Finance/Procurement Job Aids > Search for “Strategic Sourcing” to locate the following:

- Building Sourcing Library Components Job Aid
- Template Builder

