Making STAR's Strategic Sourcing Work for You

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We love Strategic Sourcing!
It's a super helpful tool. Let's talk about how to get the most out of it!

Do you build events within Strategic Sourcing or do you use the upload feature?

- Mostly building events in Strategic Sourcing

- Mostly using the upload feature

- Equally building events in Strategic Sourcing and using the upload feature

Complexity Scale

We talk about the
Complexity Scale frequently,
but what does it mean for you?

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

Have you used the Copy an Event tool in the Sourcing Event Workbench?

- Yes

- No

Event Development: Building the Main Doc

- Utilize Microsoft Word for tracking edits
  - Use Note Pad to remove formatting from Microsoft Word
  - Use keyboard shortcuts to paste into SS Edit section screen

- Use the Copy feature in the Sourcing Event Workbench

- Save before advancing to the next 20 pages

- PeopleSoft supports up to 5 levels of headers, but you don't have to use them all, only as many as needed for your bid factors

Event Development: Managing Your Event

- Event Access
    - Update vs View access
    - Add active (not termed) users to events

- Events Dates and Agency Contact Information
    - Review before posting
    - Updates can be made until event closes
    - CC Communication

Event Development: Simplified Bids

- Who receives the notification that a simplified bid has been posted?
  - 3+ selected already registered in eSupplier
  - All Bidders registered under NIGP codes

Event Development: Simplified Bids

Event Development: Simplified Bids

Development Tasks

Main Document & Bid Factors	Revisit
Supporting Documents	Revisit
Assign NIGP Codes	Revisit
View as Bidder	Revisit
Share Draft Bid Document	Start
Approval	Start
Select Bidders	Revisit
Post Event	N/A

Message

Please confirm you want to post event 11965 for public viewing. (20018,22)

RFP & RFB
Email notification will be sent to bidders registered in STAR eSupplier and VendorNet, who have registered to receive event notifications by NIGP codes

Simplified Bid
Email notification will be sent to invited bidders. If there are no invited bidders, then email notifications will be sent just as RFP and RFB

OK   Cancel

Which Bid Factors do you use most often? Check all that apply:

- Attachment
- Cost Sheet
- Date
- Dollar Amount
- List
- Long Text
- Number
- Quantity & Price
- Text
- Yes/No

Event Development: Bid Factors

Use "Attachment" bid factor for:

- Bidders to provide a filled version of a form you provide

- More control over formatting; strongly recommend for bid factors that will be evaluated in RFP

- Lots of information in one place

- Responses that can be downloaded and shared easily

Use other bid factors for:

- Limiting how bidders can respond ("Checkbox" or "Yes/No")

- Identifying a response as Pass/Fail (e.g., "Do you agree to meet the mandatory requirements?"

Event Development: Bid Factors

If you build your solicitation outside of SS and upload your main document, you still have options for bid factors!

1. You can create a single bid factor and require bidders to combine all response materials into a single document

   - A proposal always requires at least 2 bid factors in order to keep cost separate

   - Requesting a .zip file allows you to receive all attachments in their native format (e.g., Excel for cost sheets)

Event Development: Bid Factors

If you build your solicitation outside of SS and upload your main document, you still have options for bid factors!

2. You can create a bid factor for each document you need in their response (e.g., Bidder Required Form, cost sheet, answers to technical questions, licenses and certifications

   - By requiring each attachment be submitted separately and making each mandatory, bidders cannot submit without completing all requirements

Event Development: Bid Factors

- If you can answer "Yes" to each of the following statements, you should build your cost sheet as a "Cost Sheet" bid factor:

  - You need 6 or fewer inputs, AND

  - You won't need formulas, AND

  - You have few or no cost sheet instructions

- The "Cost Sheet" bid factor can be a great option for most simplified bids and some RFBs

Event Development: Bid Factors

- If any of the previous statements aren't true for your solicitation, you should build your cost sheet in Excel, Word, or as a PDF

- Provide an "Attachment" bid factor for bidders to upload their cost sheet

- This method is recommended for some Simplified Bids, most RFBs, and all RFPs

Posting & Managing: Making Updates

- Check your dates and times

  - Set a local time zone

  - Use 24-hour clock

  - Remember to update the Event dates in SS if you need to extend your due date

  - Changing Event Manager

Do your evaluators usually evaluate proposals within Strategic Sourcing or outside Strategic Sourcing?

- Usually within SS

- Usually outside SS

- Sometimes within and sometimes outside SS

RFP Evaluation: SS & Scoring

Scoring Within SS:

- Stores questions, benchmarks, responses, and evaluator ratings all in one convenient place

- Evaluators need to enter scores every round; Manager must lock scores after each round and start a new scoring round each time

- Evaluators must score with the rating scale you define within SS; you will only see the resulting weighted point value

- You can export evaluators' scores and associated comments each round for abstracting; you must build the abstract yourself – the system will not export an abstract

RFP Evaluation: SS & Scoring – Bid Factors

Scoring Within SS:

- "Attachment" bid factors give proposers the most flexibility to include images, diagrams, slides, etc. in their responses

- We don't recommend using the "Long Text" or "Short Text" bid factors for scored questions as the lack of formatting makes them difficult to read

- Must have a bid factor for each question that will be scored, plus one for cost

RFP Evaluation: SS & Scoring

Scoring Outside of SS:

- When you have anything not scored by evaluators (e.g., autoscored, self-scoring)

- When your questions require answers that are voluminous or non-text responses (e.g., images, diagrams, charts)

- Anything that can't be scored on your defined rating scale basis

- Evaluators will still need to enter one total technical point score at the end of the evaluation

- If scoring in spreadsheets, make sure any calculated or averaged scores are whole numbers, not decimals, to ensure scoresheets will be able to match the scores entered into SS

RFP Evaluation: SS & Scoring – Bid Factors

Scoring Outside of SS:

- Each "Attachment" bid factor allows only a single uploaded response; you may suggest they use .zip files (compressed) to get multiple separate documents

- Must always have at least 2 bid factors (1 for cost, 1 for everything else); both could be "Attachment" bid factors

RFP Evaluation: Scoring Matrix

Scoring Within SS:

- Cost must always be scored on a parent header (e.g., Section 5, not Section 5.1 or 5.2)

- Questions do not all have to be at the same hierarchy level, but parent levels will always be the sum of their child levels and cannot be scored if their child levels are scored

Scoring Outside of SS:
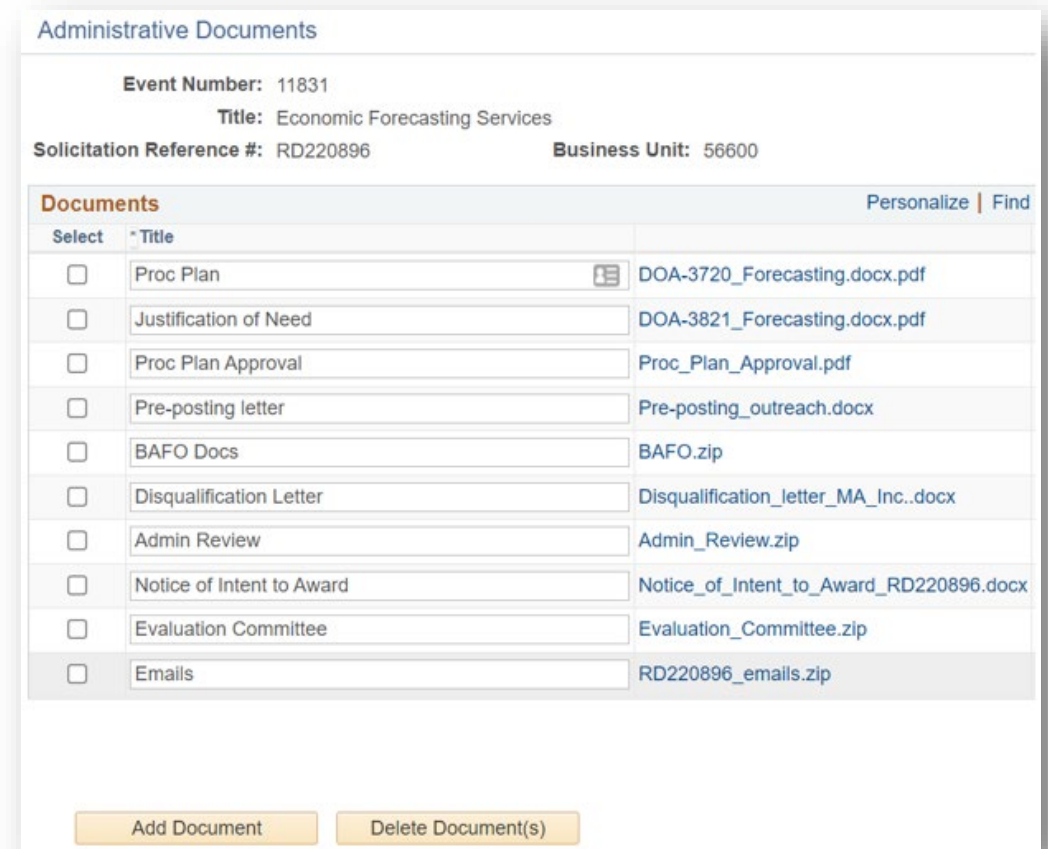
- Cost must always be scored on a parent header (e.g., Section 5, not Section 5.1 or 5.2)

- When scoring outside the system, the "scale" should be the total number of technical points available, not include cost points

Awarding in SS: Multiple Awards

- Bids can have multiple awards on a single event

  - Use the dropdown to indicate award on as many bidders as needed

- For Proposals, each component or lot that will be evaluated and awarded separately must have a separate SS Event

- Copy function is your friend!

Solicitation Records: SS is the Official Record!

- Give your supervisor, coworker "Edit" access to your event so they can retrieve records if you are out of the office or leave your position

  - "View" access won't allow them to see Admin Docs!

- You can sort your records into folders, compress into .zip files to keep them organized after uploading

Solicitation Records: Adding Emails to Your Solicitation File

- Individual records can be saved as PDF to document things like clarifications

- If you sort your solicitation emails in a specific Outlook folder, you can export that folder as an Outlook Data File

  - Data Files must be compressed into a .zip file before uploading to SS

Any lessons learned anyone would like to share?

Please share in the Discussion Forum.

Thank you!