



STAR Strategic Sourcing: Good Information, Coming and Going

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Strategic Sourcing



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

Event Status

Solicitation Reference #

Title

Created By

NIGP Filter ?

NIGP Codes

Search Mode:

Search

Clear

Create New Event

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		

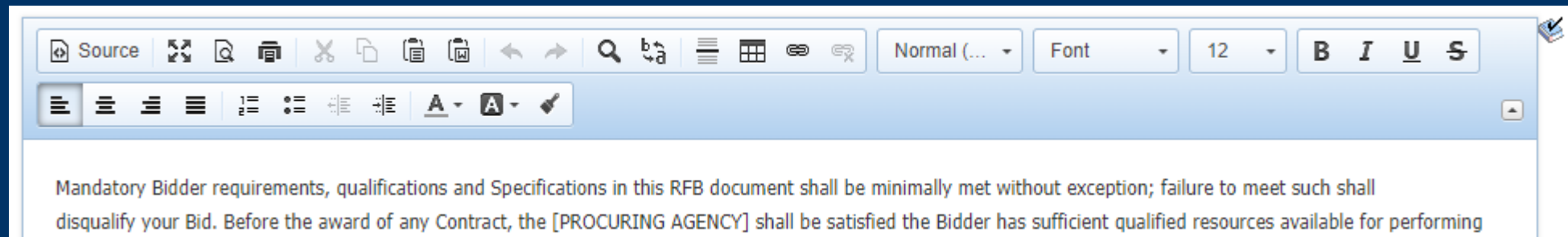


Putting Good Information In



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 Distribute Calculate Clear/Start Over

Point Assignment

<u>Section Title</u>	\$:	<input type="checkbox"/>	<input type="checkbox"/>	<u>Lock by</u>	<u>Points</u>	<u>Percent</u>
2 Attachment 3 Cost Sheet	\$:	<input checked="" type="checkbox"/>	<input checked="" 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="text"/>	<input type="text"/>	<input type="text"/>
Disallow <input type="text"/>	<input type="text"/>	<input type="text"/>
Reject <input type="text"/>	<input type="text"/>	<input type="text"/>
Award <input type="text"/>	<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





Question for the Audience

Are you interested in STAR developing an update to the system so that the awarded vendors are displayed on eSupplier after the solicitation is awarded?

Vote Yes/No

POLLING QUESTION

2023 WISCONSIN STATEWIDE PROCUREMENT CONFERENCE



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



Question for the Audience

Which types of Bid factors are best for your needs?

- 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	



POLLING QUESTION

Getting Good Information From Bidders



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

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

Bid Factor Tip!



Create Bid Factors for each document that needs to be returned with the Bid

<input type="checkbox"/>	8		^	v		>	1000000129	REQUIRED FORMS
<input type="checkbox"/>	8	1	^	v	<			BIDDER REQUIRED FORM - DOA - 3832
<input type="checkbox"/>	8	2	^	v	<	>		ATTACHMENT A - COST SHEET
<input type="checkbox"/>	8	3	^	v	<	>		ATTACHMENT B/C
<input type="checkbox"/>	8	4	^		<	>		ATTACHMENT D - CONTRACT TEMPLATE



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 Custom Bid Factor

*Type Text

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.

Find | View All First 1 of 1 Last

BF Item: 0 Is Bid Factor Active?

Bid Factor 1016 RFP 5.0 GENERAL REQUIREMENTS SCORED IN ATTACHMENT (GROUPED)

ID Custom Bid Factor

*Type Attachment

Label RFP

Question

Source [Rich Text Editor Icons]

Format [v] Font [v] Size [v] **B** *I* U ~~S~~

[List Icons] [Text Color] [Background Color]

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.

Response Required

Show to Bidder

Include in Scoring

Attach File





Question for the Audience

Are there specific types or examples of bid factors you would like to see a template for?

Put responses in the chat.

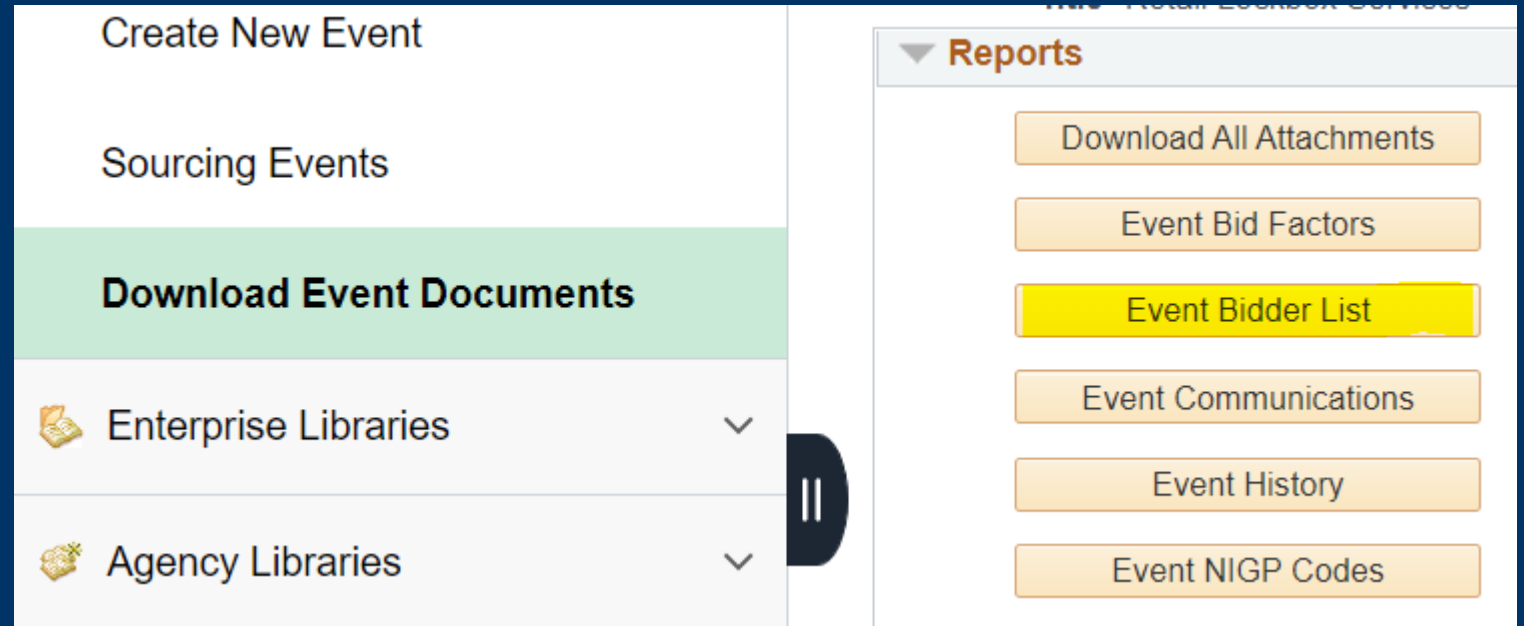
USE CHAT

Getting Good Information Out



Download Events Docs

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



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 sidebar on the left and a main content area on the right. The sidebar 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 teal pill-shaped button with two white vertical bars is positioned to the right of the 'Download Event Documents' item. The main content area is titled 'Reports' and contains a list of report options: 'Download All Attachments', 'Event Bid Factors', 'Event Bidder List', 'Event Communications', 'Event History', 'Event NIGP Codes', 'Event Q&A', '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 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 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 is titled 'Reports' and contains a list of buttons: '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



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

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"/>





Question for the Audience

Are you interested in STAR developing a mass-change process that would allow you to give someone access to a lot of your events at once?

Vote Yes/No

POLLING QUESTION

2023 WISCONSIN STATEWIDE PROCUREMENT CONFERENCE



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:



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](#)

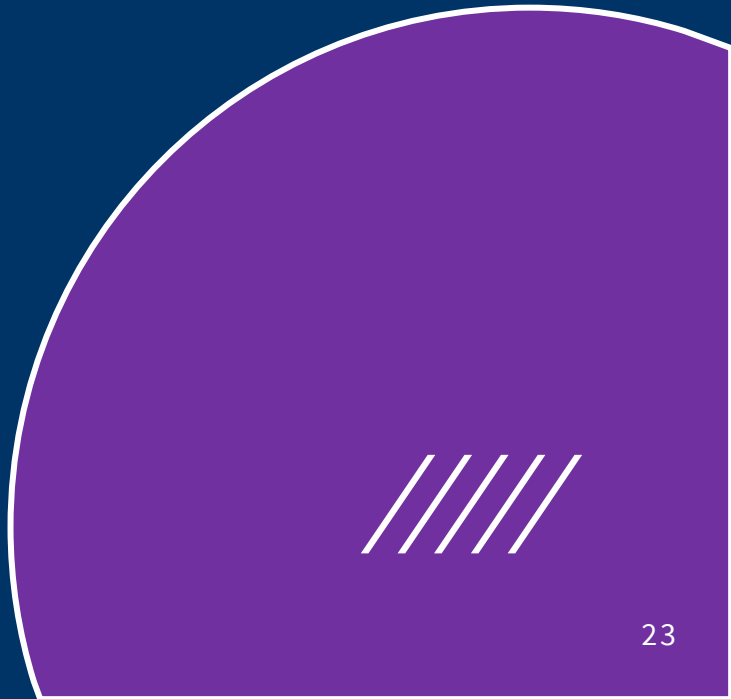
WI_SS_BIDDER	Is the bidder registered in SS
WI_SS_BIDDER_BY_NIGP	Bidder by NIGP code
WI_SS_BIDDER_EVENT_RESPONSES	Bidder - Event Responses
WI_SS_CNV_001	
WI_SS_EVENTS_BY_CRITERIA	Events by BU, status, type
WI_SS_EVENTS_BY_DATE_RANGE	Events by Date Range
WI_SS_EVENTS_STATUS_CHANGES	Event Status changes 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



Question for the Audience

Are you interested STAR developing a tile or menu to make Queries available directly in the sourcing workbench?

Vote Yes/No



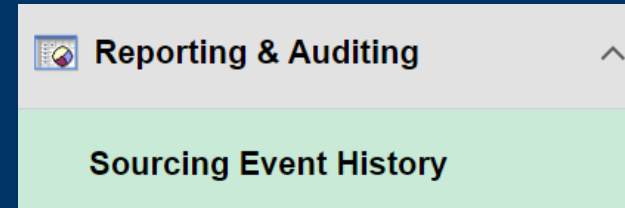
POLLING QUESTION

2023 WISCONSIN STATEWIDE PROCUREMENT CONFERENCE

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



Thank you for coming!

Contact us with questions!

DOAWisPro@wisconsin.gov and STARSupport@wisconsin.gov.

Check out the eLearnings for
Strategic Sourcing on Leader/Cornerstone:
[Creating a Strategic Sourcing Event](#)
[Scoring and Awarding Strategic Sourcing Events](#)

