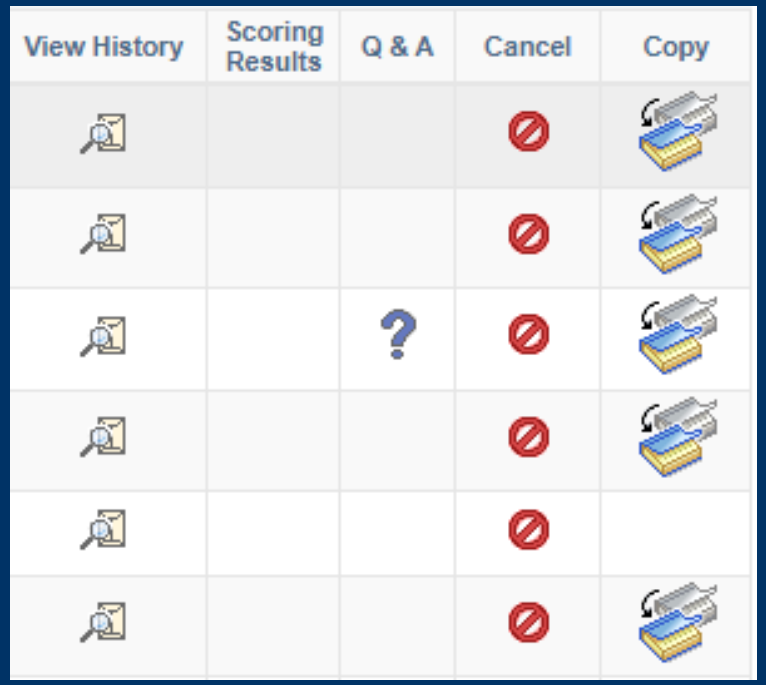
STAR Strategic Sourcing: Good Information, Coming and Going

Presented by Chris Tucker, Jessica Harlan, Penny Lawler, and Kristina Harris

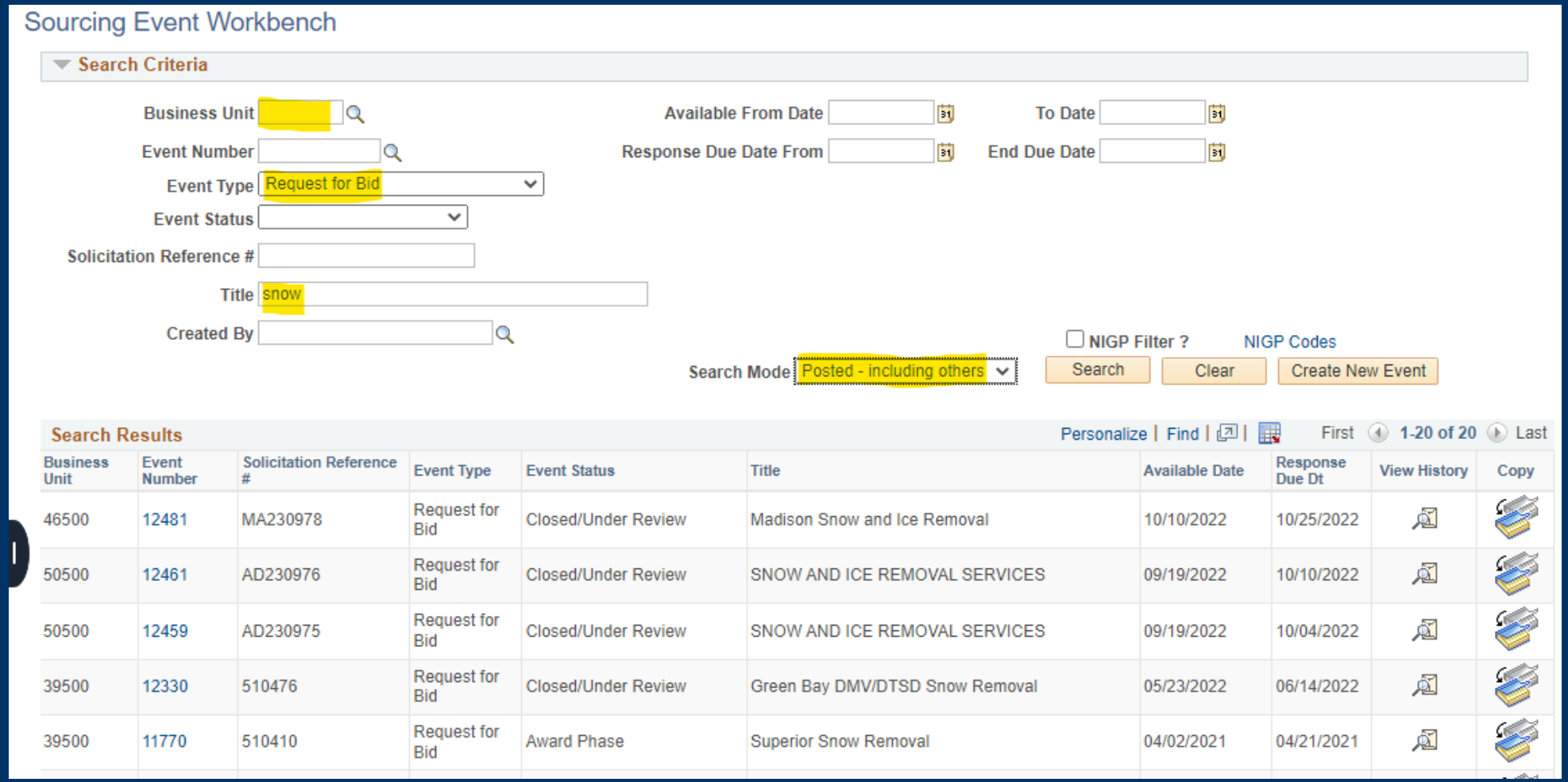
Putting Good Information In

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



Putting Good Information In

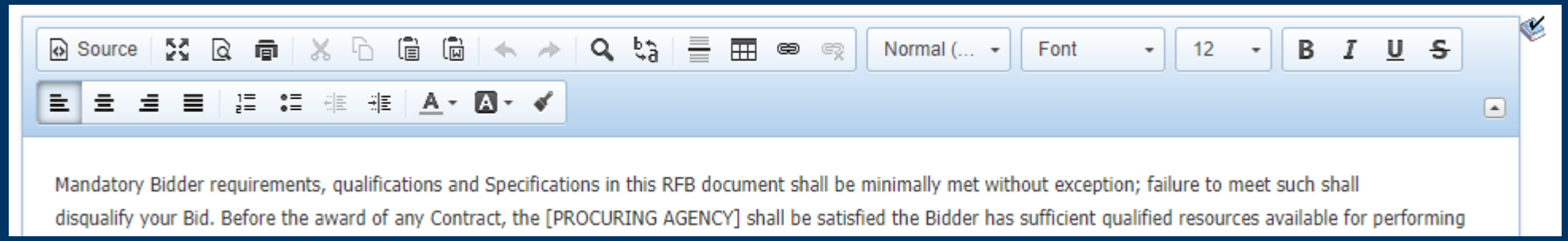


Business Unit	Event Number	Solicitation Reference #	Event Type	Event Status	Title	Available Date	Response Due Dt	View History	Copy
46500	12481	MA230978	Request for Bid	Closed/Under Review	Madison Snow and Ice Removal	10/10/2022	10/25/2022		
50500	12461	AD230976	Request for Bid	Closed/Under Review	SNOW 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

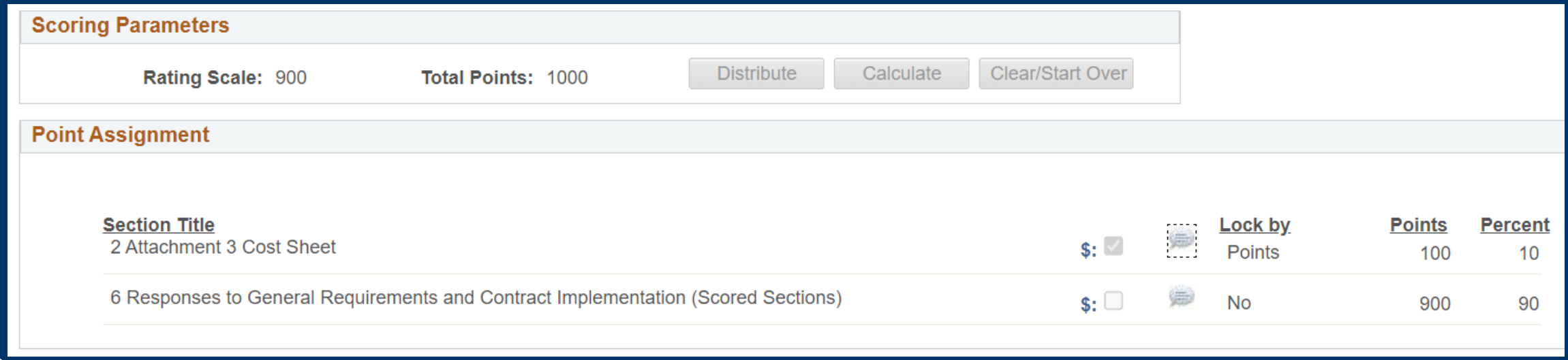
Tips for formatting and organizing your text when building in Strategic Sourcing:

- 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

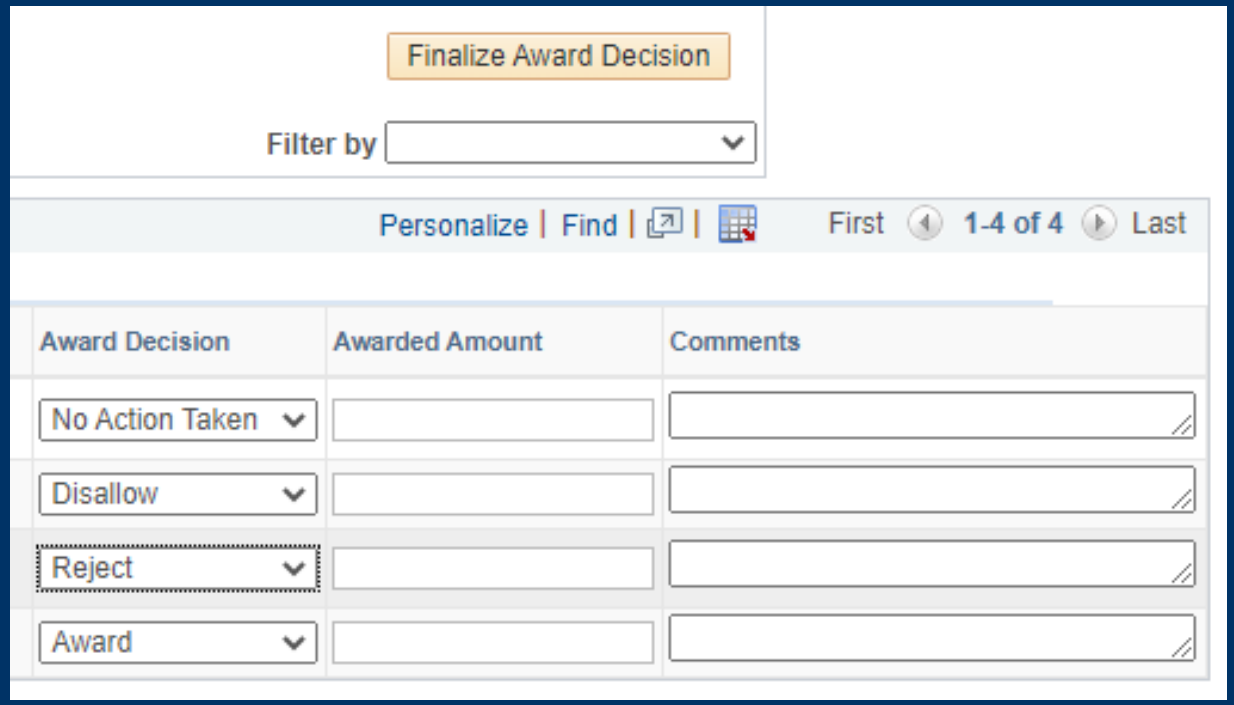
Section Title	$:		Lock by	Points	Percent
2 Attachment 3 Cost Sheet	$:		Points	100	10
6 Responses to General Requirements and Contract Implementation (Scored Sections)	$:		No	900	90

Putting Good Information In

Scoring Questions Individually

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

Putting Good Information In



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

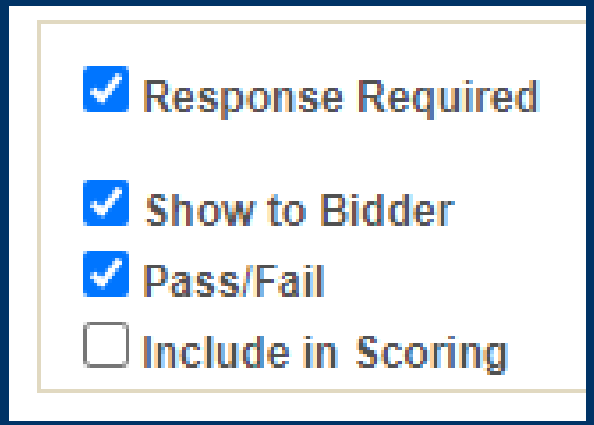
Question for the Audience

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

Getting Good Information From Bidders



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?

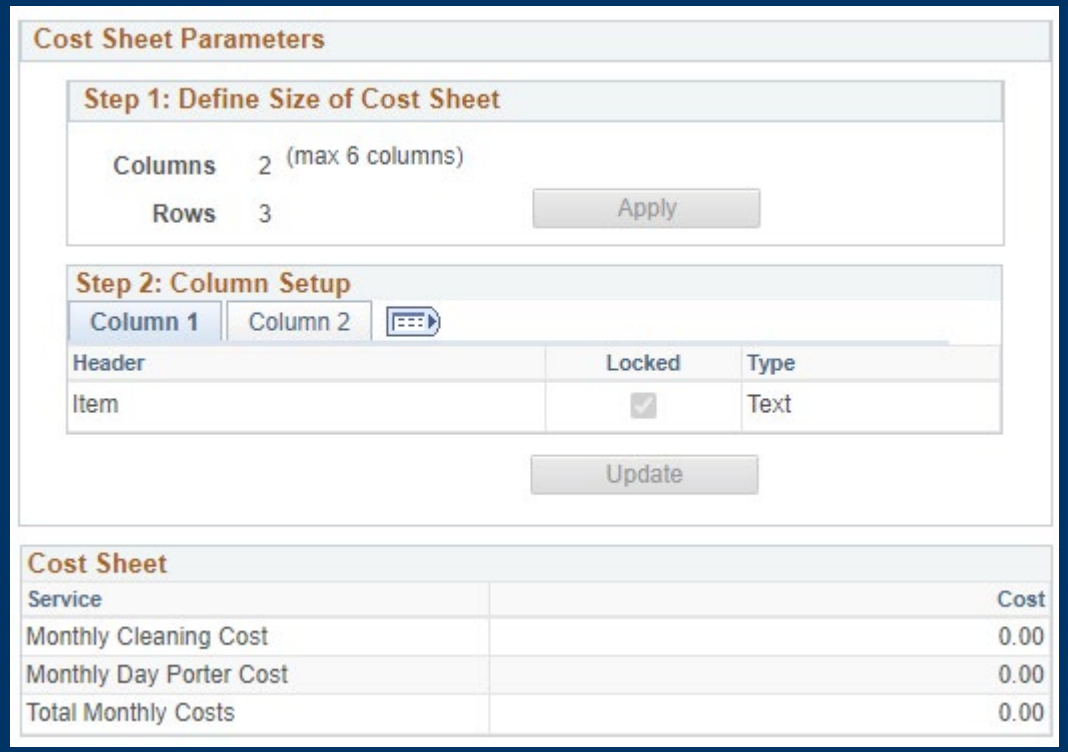
- Attachment type
- Yes/no
- List

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



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!

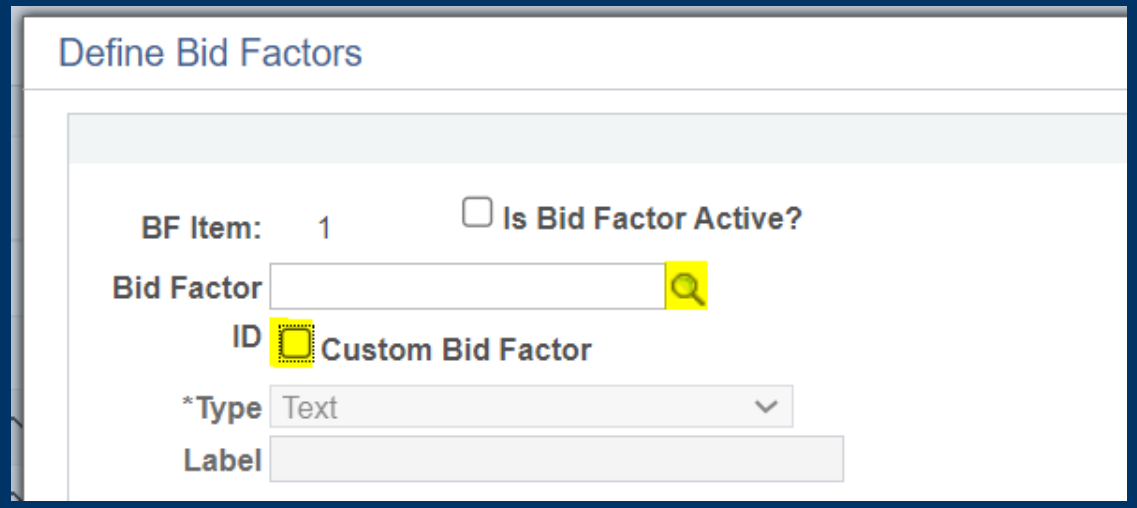
Create Bid Factors for each document that needs to be returned with the Bid

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

Getting Good Information From Bidders

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

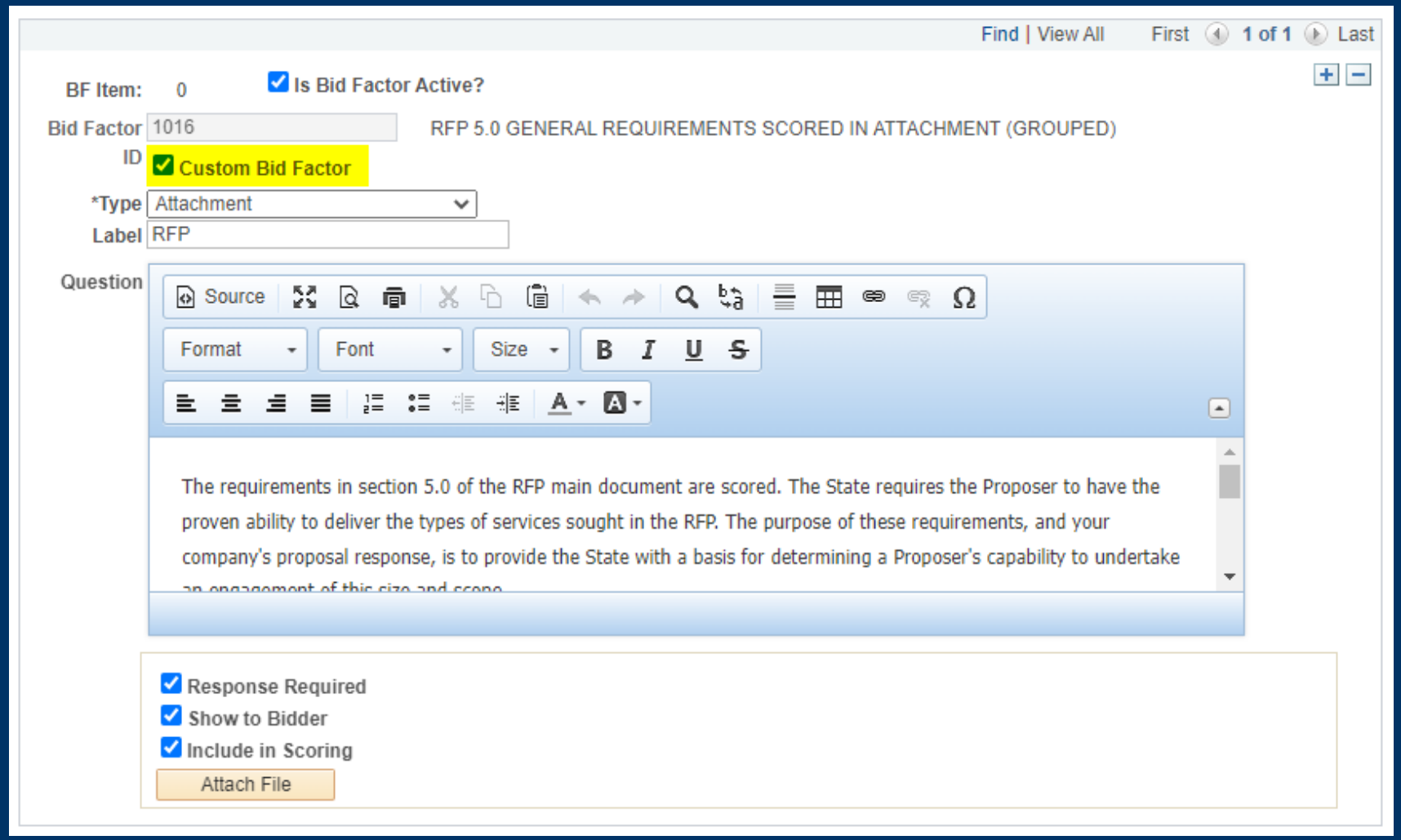
- Can be used as found, or used as a base from which to customize



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.



DEPARTMENT OF ADMINISTRATION
DOA.WI.GOV

Question for the Audience

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

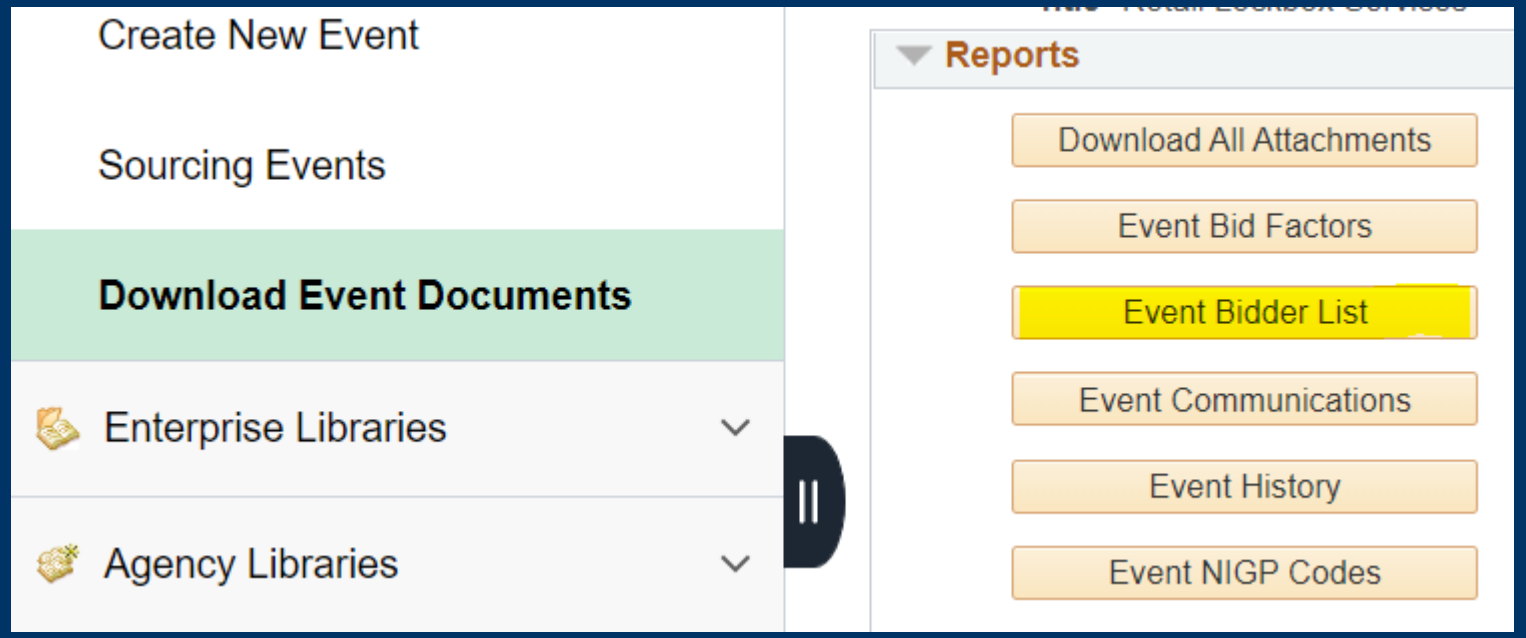
Put responses in the chat.

USE CHAT

Getting Good Information Out

Download Events Docs

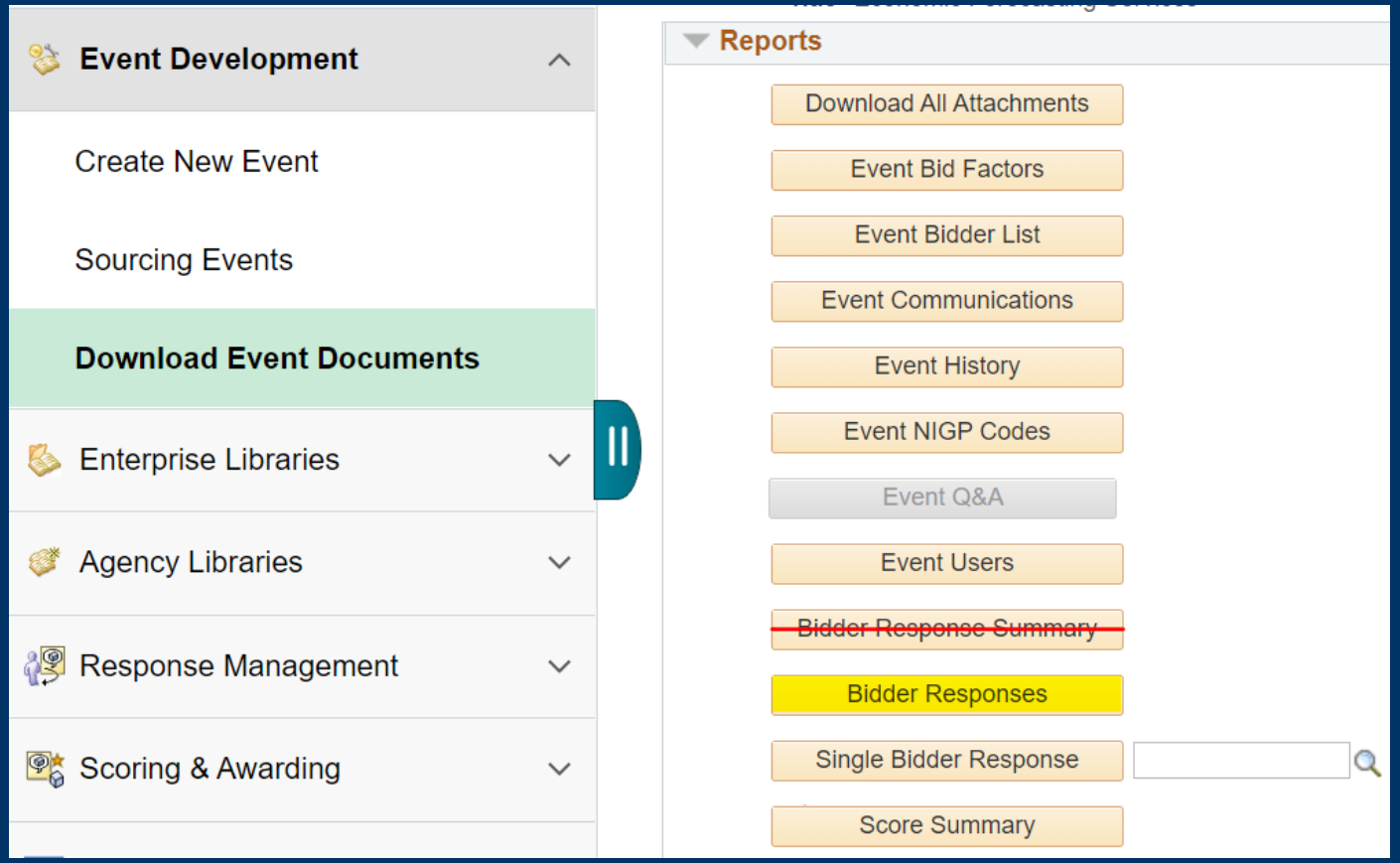
- How do I download the list of Bidders who were notified at the time of event posting?



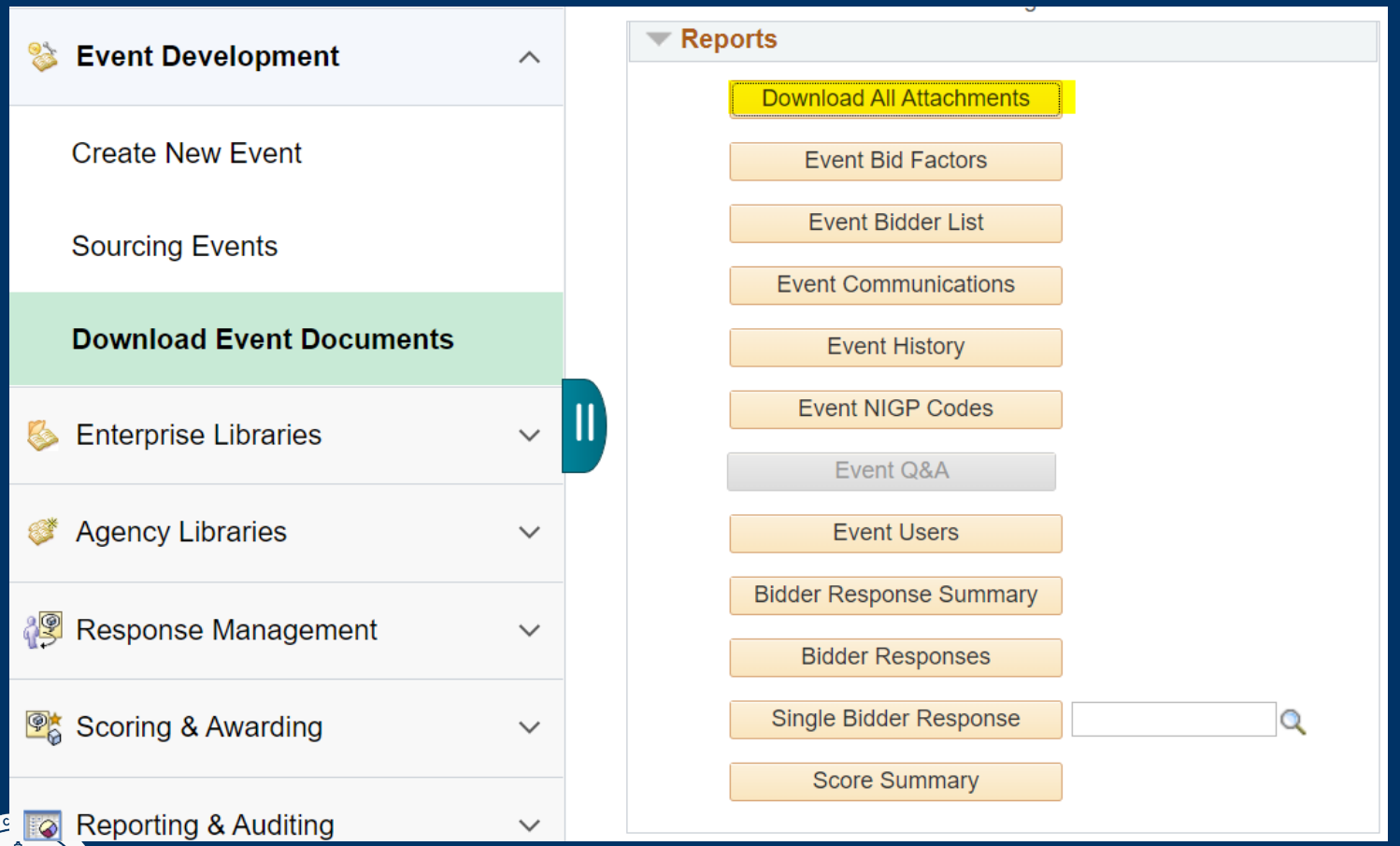
Getting Good Information Out

Download Events Docs

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



Getting Good Information Out



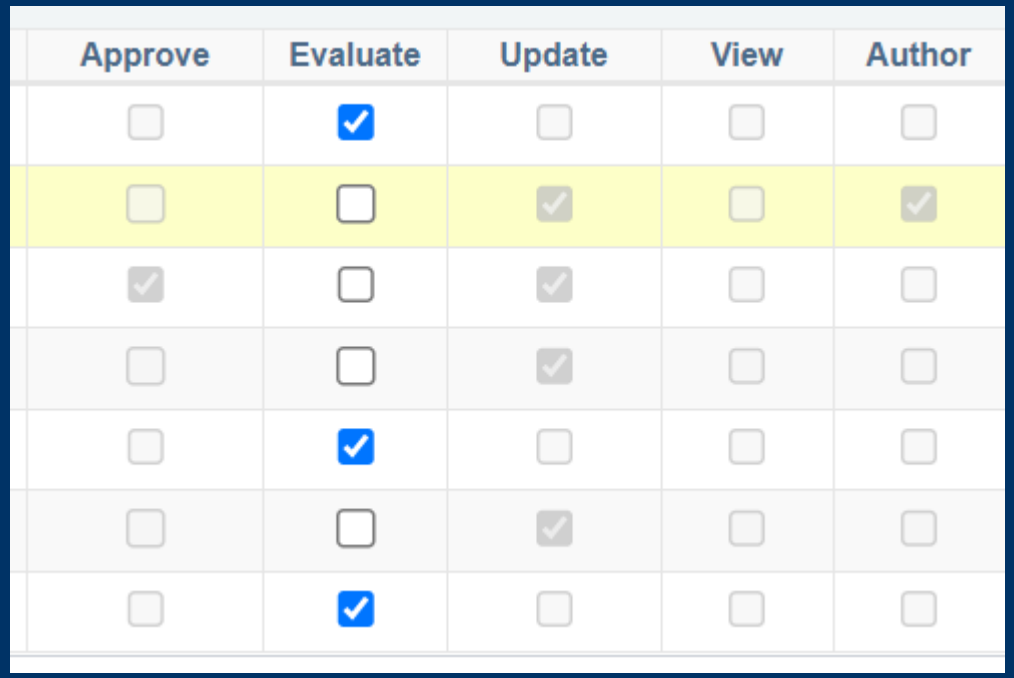
Download Events Docs

- 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



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?

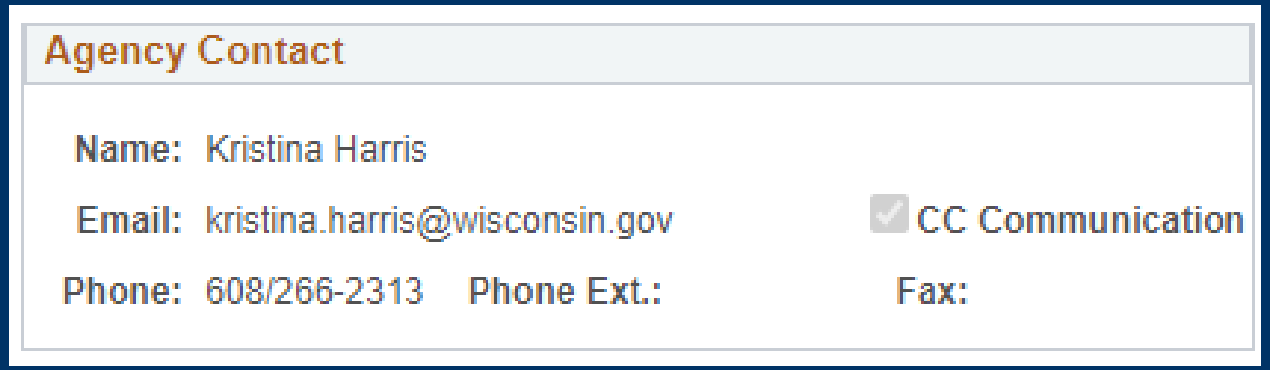
Vote Yes/No

POLLING QUESTION

Getting Good Information Out

CC Communication Checkbox

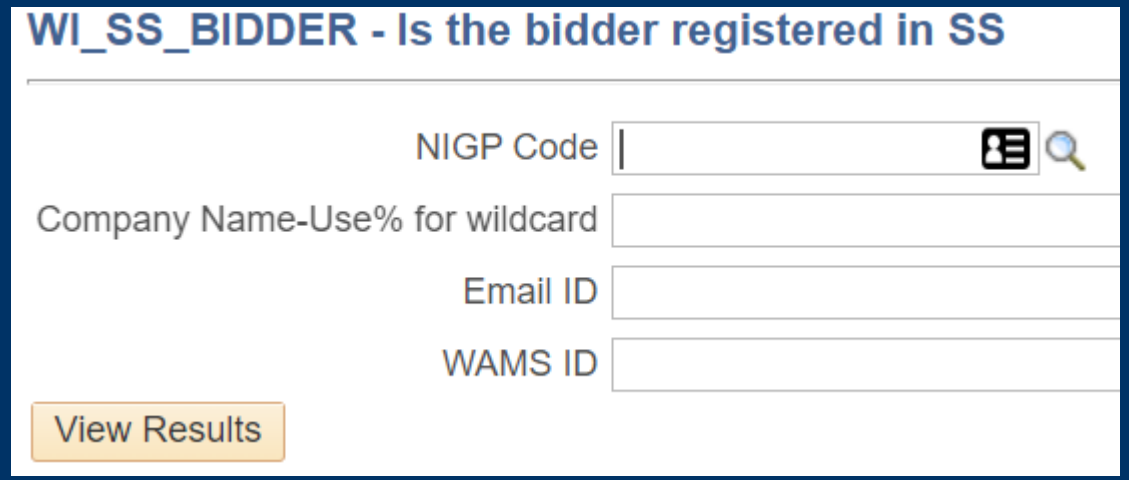
- When the Author (person who created the event) is no longer the primary point of contact
- This is intended for replacement, not as a supplement to the Author



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
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

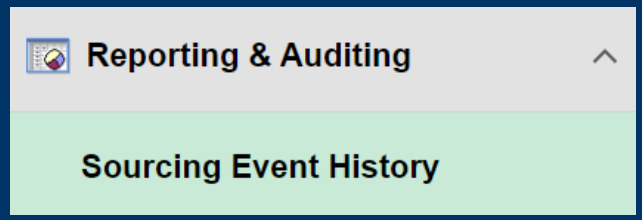
Are you interested STAR developing a tile or menu to make Queries available directly in the sourcing workbench?

Vote Yes/No

POLLING QUESTION

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