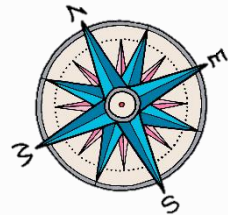


Sourcing Best Practices

Welcome!



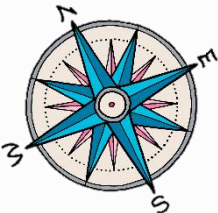
AGENDA

Introductions

Bidder Outreach

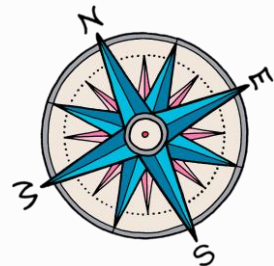
Innovative Tools

RFP Process Management



Bidder Outreach...

Is it worth the effort?



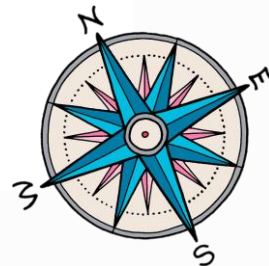
Outreach and Collaboration

The Bureau has focused on three innovative practices for improving outreach and collaboration with potential bidders.

Pre-Bid Conference

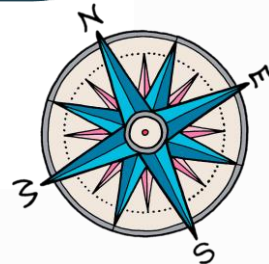
Draft Solicitations/RFI

Outreach



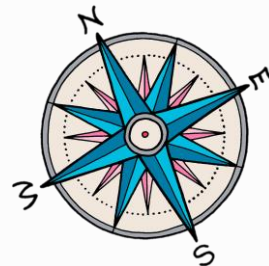
Pre-Bid Conference

- Innovative approach to vendor relations.
- Held in advance of the release of a procurement.
- Allow potential bidders the opportunity to ask solicitation-specific questions.



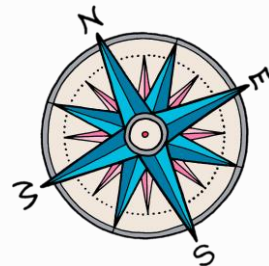
Draft Solicitations/RFI

- Increases the quality of the solicitation
- Increases overall vendor engagement
 - Traditionally, vendors have not been allowed to have any insight into an RFP/RFB or to ask questions until the official solicitation is published.



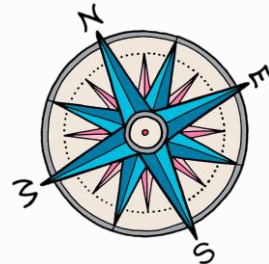
Bidder Outreach

- Increase competition
- Generate savings
- Encourage MBE/DVB participation
- Improve quality of future solicitations



Results Matter

Type	Description	Letters Sent	Responses From Letters Sent	Bid Results	
RFB	Building Maintenance System Controllers	13	3	Dual award - 2 of the 3 vendors received award	If no bidder, state would need to rebid.
RFB	Lawn Care Services	22	4	Awarded by site - all 4 vendors received a site award	\$ 115,859.76
RFB	Command Center	3	3	Awarded to bidder that received the notice	\$ 11,933.32
RFP	Incident Management Software	7	4	Awarded to bidder that received the notice	1,600 Technical/General Requirement Points available. Awarded Proposer received 1,366.5 next highest proposer received 1,179. Difference of 187.5
RFB	Catering Service - REACT	7	1	Awarded to bidder that received the notice	If no bidder, state would need to rebid.
RFB	Industrial Vacuum Truck Services	2	1	Awarded to bidder that received the notice	\$ 2,805.00

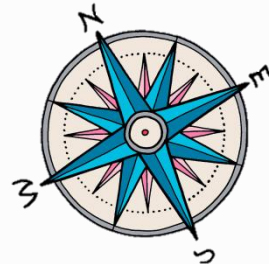


Guidance Suite at DHS

BY MATT LIMOGES



WISCONSIN DEPARTMENT
of HEALTH SERVICES



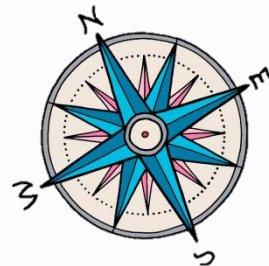
What is the Guidance Suite?

The Guidance Suite is a document based tool to provide detailed guidance on every step of the procurement process at DHS.

The Guidance Suite is made up of 4 different document types

- Policies
- Operating Standards
- Supplemental Guidance Material
- Templates

The Guidance Suite is hosted on SharePoint



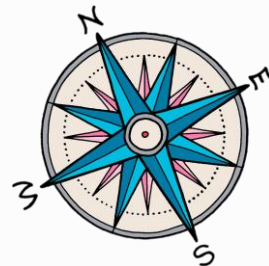
Guidance Suite

DHS leadership wanted to provide a step-by-step instruction manual on how to conduct procurements at DHS

- Staff Turnover
- Uniformity of Documents
- Streamline the procurement process

Guidance Suite Format

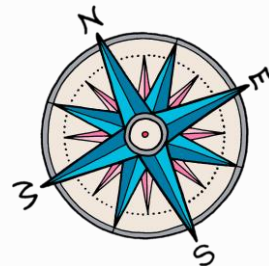
- User Interface
- Sorting the Documents
- Different Learning Styles



Improvements

Since providing this detailed guidance, DHS has experienced:

- Shorter onboarding/training times for procurement staff
- Better uniformity and consistency in our processes
- More efficient processes
 - Allows Procurement Managers to focus on the details of a solicitation rather than the process
- Procurement staff development



Guidance Suite

The screenshot shows a SharePoint web browser interface. The address bar displays the URL: <https://share.health.wisconsin.gov/agency/sourcing/SitePages/Guidance%20Suite.aspx>. The page title is "Guidance Suite".

Navigation Menu (Left):

- Home-External Site
- BSS Directory
- BSS Staff Site-Internal
- BSS Managers Corner
- EDIT LINKS

Guidance Suite Header:

Division Pages: DMS, DCTS, DPH, DQA, OIG, OPFB

Sourcing Events: SSI List

AA/CRC Look-Up: Grant Exemption Request Approval Library

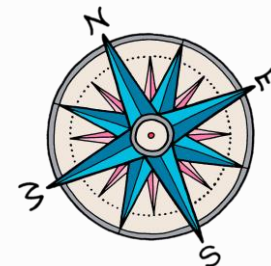
DHS Internet: Doing Business with DHS

Standardized Documents: Templates Library, Language and Guidance, Sample Documents

Sourcing Resources: VendorNet User Guide, Contract Life Cycle, State Procurement Manual (PRO), Wisbuy Guide, Mandatory Statewide Contracts, VendorNet Information Updates, STAR Guidance, Report an Issue with this

Guidance Materials Table:

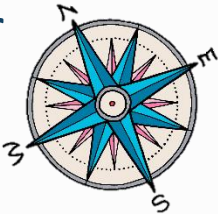
Name	Categories	Description	Document Type
Document Type : Operating Standard (24)			
Document Type : Policy (13)			
Document Type : Supplemental Guidance Material (SGM) (23)			
Document Type : Template (47)			
Amendment Notice Template	RFB, RFP, RFI	Amendment notice template to be used when amending an RFB, RFP or RFI.	Template
Attachment B - Vendor Checklist - GOODS	RFB	Template for Attachment B of an RFB for Goods.	Template
Attachment B - Vendor Checklist - RFP	RFP	Attachment B - Vendor Checklist - RFP	Template
Attachment B - Vendor Checklist - SERVICES	RFB	Attachment B - Vendor Checklist - SERVICES	Template
Attachment C - Vendor Questions	RFB, RFP, RFI	Posted to VendorNet with RfX by Purchasing Agent. Used to capture vendor questions and DHS answers during sourcing event.	Template
Award Letter (GOODS)	RFB	To be used when awarding a contract for Goods.	Template
Contract for Services Template	Contract		Template



Signs that you are ~~not~~ cut out to be a great RFP Manager

Do you have the SKILLS, TOOLS and DESIRE to lead a
successful RFP Project?

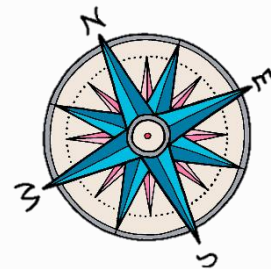
This presentation will help you determine whether
you should run, hide or take the challenge!



Proposal Management Skills

The discipline of managing resources to achieve specific goals:

- ✓ Planning
- ✓ Process - Organizing/Executing/Documenting work and activities
- ✓ People - Motivating/Collaborating/Communicating
- ✓ Power - Authority (Decision makers, policies)



Why we need Project Management



What the customer wants



What the builder wants



The final product

Are you a good communicator?

Up to 80% of a Procurement Specialist's time is spent in some aspect of communication.

What:

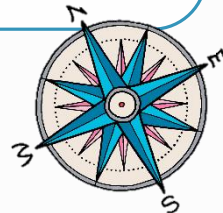
- Meetings
- Status Reporting
- Emails
- Phone calls
- Coordinating
- Talking to people

To Whom/ With Whom:

- Executive Management
- Stakeholders
- Team members
- Vendors

Roles:

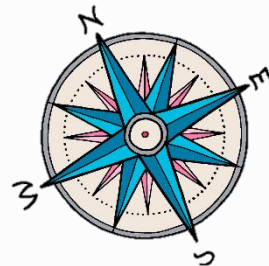
- Facilitator
- Trainer
- Note taker
- Negotiator
- Mediator
- Collaborator



Do you like your pets more than people?

- Collaboration is the foundation for any procurement process.
- You will be actively engaging and managing teams, their responsibilities, tasks and activities, communicating and connecting to move the procurement forward.

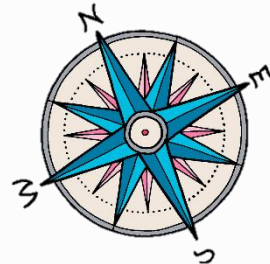
If you prefer to work alone, you will need to find a balance and method to effectively work with people



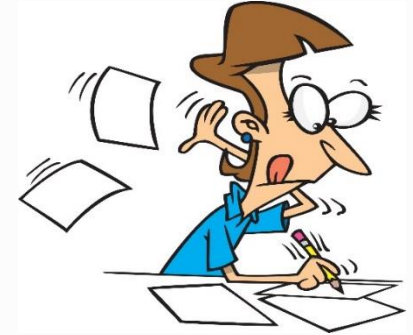
Are you organized?



- Know the difference between multi-tasking and prioritizing.
- You need to have some sort of a personal productivity system in place to which you hold yourself accountable.
- Schedule everything. Minimize distractions. Learn to single-task.



Do you like to follow processes or document things?

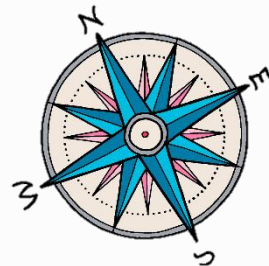


Planning

- Do you tend to execute before you understand what the task is?
- Bad surprises can be painful. Understand what you are doing - before you do it.
- Anticipate problems.
- Create a project plan/roadmap that provides direction for the project.

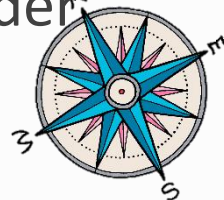
Documenting

- Establish audit trail for what has been done, who has done it, and when it has been done
- “If it’s real, it’s documented.”



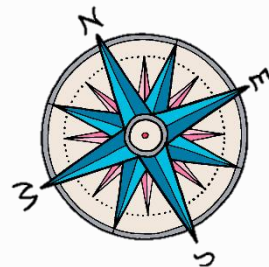
Are you unmoved by deadlines?

- Understand the motivation for the deadline. Ensure deadlines are realistic. Allow margin for error.
- Utilize risk management. Manage expectations early in the project.
- Manage scope and ‘scope creep’.
- Deadlines can help you plan your workload, ensure you get all your tasks done by the specific date, improve your time management and organizational skills. It will also help you to learn to focus, not panic, when working under pressure.



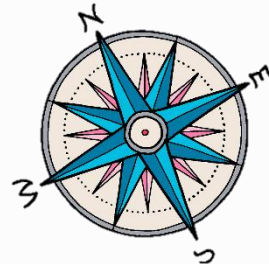
Do you have difficulty making tough decisions?

- As the Procurement Manager for the RFP, your team and all stakeholders will look to you as the key leader and decision-maker.
- At every critical problem point, be a confident decision maker. Know when to use data, engage team, call in additional resources, draw upon your experience or others' expertise or rely upon.



Are you uncomfortable saying “No”?

- Saying “No” can be painful.
- Some avoid it just to avoid short-term pain, only to find later that the long-term pain is even worse.
- Giving a firm and clear “No” if founded in sound reason is justifiable.



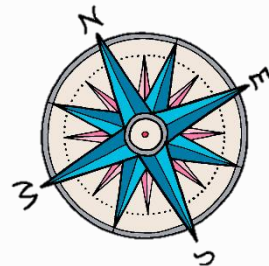
Do you handle pressure well?

Being a Procurement Specialist means you have the target on your forehead for the entire project.

The Procurement Specialist has to stay on top of status, project schedules, issues, risks and all project communications constantly. Pressure is frequent throughout the project.



<http://pmtips.net/blog-new/signs-cut-project-manager>

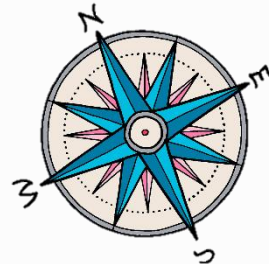


Do you need constant recognition and praise?

It's common that much of the recognition will go to the technical resources that developed the solutions.

You led, but you didn't create...and that's ok.

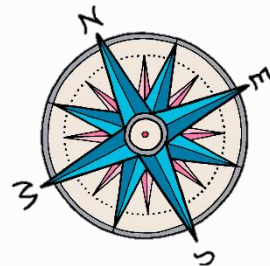
Let the reward be the relationships that you build with your team and the skills that you acquired from managing the RFP well.



Is procurement just “overhead”?

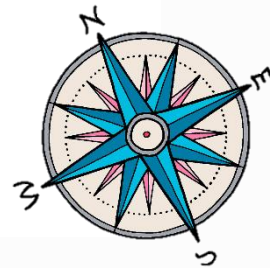


If you don't think there is value in the work associated with planning, scheduling, managing the tasks, processes and resources of the procurement, no one else will.



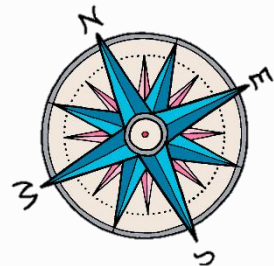
RFP Management is about LEADERSHIP

- Own It
- Master It
- Become It



RFP Project Charter

- Foundation of the Project
- High-level planning components
- Roadmap – provides direction for the procurement



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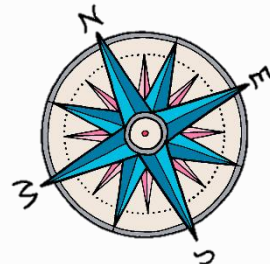
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The

