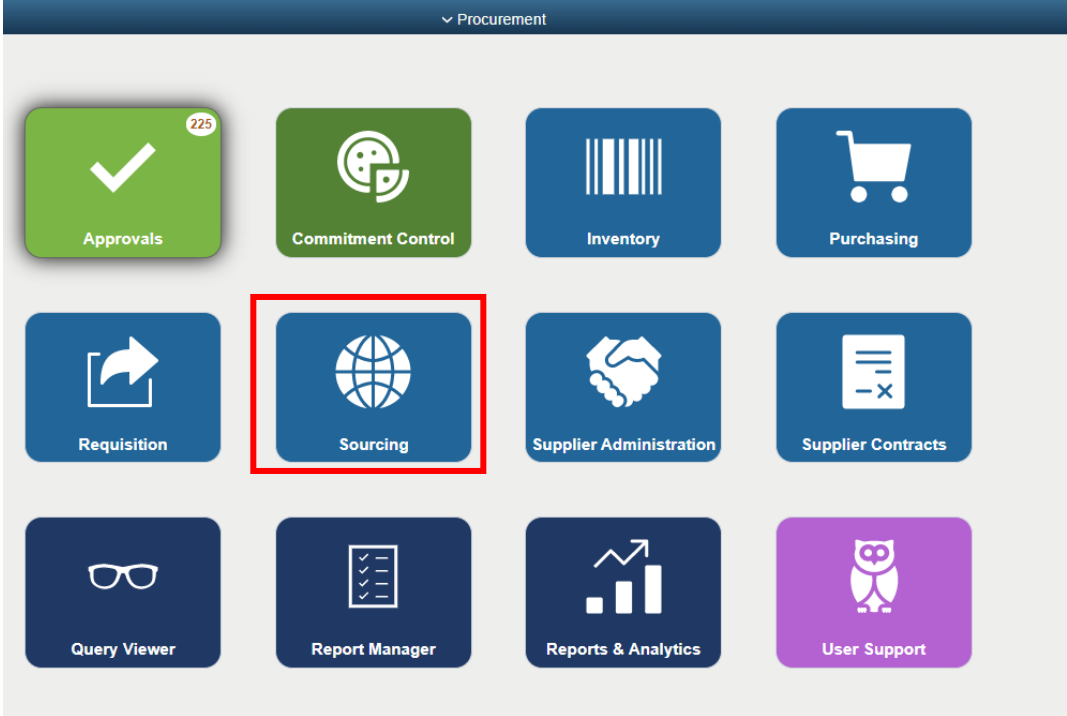# Guide on Creating a Sourcing Event for Technology Marketplace RFPs

Version 1.1 Dated July 27, 2021

Contents

I. Creating a Sourcing Event for Technology Marketplace RFPs

Step	Action
1.	To create a Sourcing Event, log into PeopleSoft, choose the Procurement homepage, and click on the Sourcing icon.
2.	Next, open up the Manage Events section and click on Event Details to bring you to the Create Events page. In the **Event Format**, select "Buy" from the dropdown, and then click on Add. This will then bring you to the Event Summary Page.

3.	Create an **Event Name**. This should be in the format of [DEPT NAME]	IT – [What is being procured]. For example: PUC	IT – Web Redesign Project. Next, you will utilize **the Copy From** function and select "Sourcing Event" from the dropdown. Then click on **Go**.

| 4. | OCA has created three (3) sample sourcing events to copy from, depending on what Tier is being solicited:

Tier 1 Suppliers: Event ID: **0000005376**
Tier 2 Suppliers: Event ID: **0000005202**
Tier 3 Suppliers: Event ID: **0000005203**

Doing this will pre-fill certain information (like the list of invited Suppliers), so please utilize this function. Once you decide on the Tier you will solicit to, enter one of the Event IDs listed above and click on **Search**. You will then get a pop-up, click on **Select All** then press **OK.** You will then be brought to the Line Item page; click on **Return to Event Overview** to go back to the Event Summary Page.

 |

	Create an Event **Line Items** Business Unit SFGOV Event ID NEXT Round 1 Version 1 Event Format Buy Event T Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying line: Copy From [Sourcing Event ▼] [Go] **Line Items** ? [Basic Definition] [Advanced Definition] |	Line	Item ID	Description		Category	*UOM	*Qty
---	---	---	---	---	---	---	---
☐	1	[____] 🔍	ENTER $0.01 FOR YOUR	🖩	92000 🔍	LO 🔍	[___]	 **Event Total: 0.0100 USD** Group Selected Lines [_____ ▼] [OK] < Return to Event Overview [Save Event Changes] ✉ Notify ⟳ Refresh
5.	Now that we are back at the Event Summary Page, enter in a **Preview Date**, **Start Date**, and **End Date**. The Start Date is the first day that a Sourcing Event will be posted and the first day that Proposers will be able to enter bids into the system. In order to prevent any unequal advantage between invited Proposers, who will see the Event starting on the Preview Date, and all other Proposers, who will see the public posting on the Start Date, **it is mandatory that your Start Date/Time and Preview Date/Time are the same**. The End Date represents the last day that bids can be entered into the system by Proposers. Next, in the description, enter the following boilerplate language in the **Description;** I have highlighted the sections that you will need to edit: This Request for Proposals (hereinafter "Solicitation") is being issued by [enter department name] ("DEPT"). DEPT is seeking qualified suppliers ("Proposers") to provide proposals for [explain what is being procured] ("Proposal"). For complete details, see the RFP document and its accompanying Attachments. Proposers should check and be sure that they have received all documents, and should follow the instructions contained within this RFP when preparing their Proposal. Please avoid mistakes and read the documents identified herein. SOLICITATION POINT OF CONTACT: If you have any questions regarding this solicitation, please only reach out to the following: [NAME] [EMAIL] [WORK NUMBER] DO NOT reach out to any other individual from the City and County of San Francisco for questions or comments regarding this solicitation, unless told so explicitly in writing.

6.	Now, click on **Event Settings and Options**. In the resulting page, <u>check off</u> the box for **Bid Required On All Lines**, <u>uncheck</u> the box for **Allow Split Analysis Review**, and enter "1" for the **Minimum Number of Bid Reponses** and **Number of Days Warning Prior**. It is at this point you can **Save Event Changes**, which will generate an Event ID and save your work. I would encourage you to regularly save to avoid losing any progress.

	Create an Event Event Settings and Options Business Unit SFGOV **Event ID 0000005343** Round 1 Version 1 Event Format Buy Event Type RFx ☑ Create PDF on Event Post Round\Version Display Display Round and Version ▼ ☑ Allow Bidder XML Downloads ☑ Bid Required On All Lines ☑ Sealed Event ☐ Allow Split Analysis Review ☑ Display Bid Factor Weightings ☑ Multiple Bids Allowed ☑ Allow Edit of Posted Bids ☐ Do Not Use Best Bids on New Rounds ☐ Display Bid Factor Best/Worst ☐ Display Bid Factor Ideal Value Factor Event Score Into Total Score ▼ Start Price Do Not Display ▼ Header Weighting Line Factor Weighting ☐ Bidders May Create Line Groups ☐ Allow Price Breaks with Groups ▼ Minimum Response and Warning Minimum number of bid response 1 Number of days warning prior 1 ▶ Associated Categories Save Event Changes GoTo ▼ Go < Return to Event Overview ✉ Notify ⟳ Refresh 🗎 Add 📝 Update/Display

7.	Going back to the Event Summary page, now we need to update the **Payment Terms and Contact Info**, so click on that. Then, fill in the **Bill Address**, **Buyer**, and **Event Contact** Information. This point of contact must be the same individual listed on the TM P-690 RFP solicitation document and in the Event Description in Step #5. All Supplier questions regarding the solicitation shall be addressed to this sole individual.
	
	Step 1: Define Event Basics
	Enter basic information, general settings and optional rules for this event.
	
	     * Event Settings and Options **Payment Terms and Contact Info**
	     Event Comments and Attachments Event Constraints
	     Event Header Bid Factors
	     Add an RFx Document
	
	Step 2: Configure Line Items
	Create line listings for this event.
	
	     * Line Items Item Line Defaults

Modify an Event

Event Contact Details

Payment & Currency Information ⓘ

*Currency USD 🔍	Exchange Rate	*Rate Type CRRNT 🔍	
Pay Method ▾		Rate Date 04/27/2021 📅	
Payment Terms 🔍		☐ Allow bids in other currencies	
Bill Addrs 🔍		☐ Tax Exempt	
Buyer 🔍		Exempt ID	

Event Contact ⓘ

Contact Name

Email ID

Phone

[Save Event Changes]   GoTo ▾ [Go]

< Return to Event Overview

[🔄 Return to Search] [📧 Notify] [🔄 Refresh]   [📝 Add] [Update/Display]

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8. Next, in the Event Summary page, you will edit the **Event Comments and Attachments**. This is where you will upload all of the pertinent documentation that you want Proposers to view, such as TM P-690 RFP Document and Attachment #4 City-Created Price Proposal Template, which can be found on the OCA website. Make sure to check off the boxes **Display to Bidder** and **Include in Notifications** for all documents that you want Proposers to see. Include a concise description of the document in the **Attachment Description**. Lastly, in the **Comments**, this is where you will list all of the Documents you have uploaded to the Sourcing Event; check off the **Send to Bidder** box. When you are done, click **OK** to go back to the Event Summary page.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

* Event Settings and Options   Payment Terms and Contact Info
Event Comments and Attachments   Event Constraints
Event Header Bid Factors
Add an RFx Document

Step 2: Configure Line Items
Create line listings for this event.

* Line Items   Item Line Defaults

9.	Next, we will take a look at the **Line Items**. Because you should have utilized the "Copy From" function in Step #4 to copy one of the sample Sourcing Events, the information here will already be pre-filled. There is no need to make any changes. We will require Proposers to enter "$0.01" in their unit price for line item #1 because this is an RFP and as such, Proposers will be judged on their best-value solution, rather than the lowest price. Departments will evaluate Proposers based on their submitted Proposals.

	Modify an Event **Line Items** Business Unit SFGOV Event ID 0000005343 Round 1 Version 1 Event Format Buy Event Type RFx Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types. Copy From [_____ ▼] [Go] Filtered View [All Lines and Groups ▼] Line Items (?) Personalize | Find | View All | 🗗 | 🔢 First ◀ 1 of 1 ▶ Last **Basic Definition** | **Advanced Definition** |	Line	Item ID	Description		Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting	
☐	1	[____🔍]	[ENTER $0.01 FOR YOUR] 🖹	[92000 🔍]	[LO 🔍]	1.0000	0.0100	$0.01	0.00000 ➕ ➖	 Event Total: 0.0100 USD Line Weighting Total: 0 % Remaining Weight: 100% Group Selected Lines [_____ ▼] [OK] < Return to Event Overview GoTo [_____ ▼] [Go] [Save Event Changes] [🔍 Return to Search] [✉ Notify] [🔄 Refresh] [➕ Add] [📄 Update/Display]
10.	Lastly, we will take a look at the **Bidder Invitations**. This contains the complete list of all Suppliers in the appropriate Tier who will be notified of the RFP when it is posted. Because you should have utilized the "Copy From" function in Step #4 to copy one of the sample Sourcing Events, the information here will already be pre-filled. There is no need to make any changes. **Step 1: Define Event Basics** Enter basic information, general settings and optional rules for this event. * Event Settings and Options Payment Terms and Contact Info Event Comments and Attachments Event Constraints Event Header Bid Factors Add an RFx Document **Step 2: Configure Line Items** Create line listings for this event. * Line Items Item Line Defaults **Step 3: Select Bidders to Invite** Send out targeted invitations to this event, designate it as a public event, or both. * Bidder Invitations **Step 4: Invite Collaborators** Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it. Event Collaborators

Modify an Event

Invite Bidders

Business Unit SFGOV   Event ID 0000005343   Round 1   Version 1   Event Format Buy   Event Type RFx

▷ Diversity Information ?

☐ Public Event

Bidder Invitation List ?   Personalize | Find | View All | 🗗 | 🏢   First ◀ 1-19 of 19 ▶ Last

Bidder ID	Bidder Type	Status	Location	Bidder Company▲	Category	Diversity	*Dispatch Method		
0000032444	Supplier		MAIN	CCS Global Tech			Email ⌄	▤	⊟
0000023205	Supplier		MAIN	CDW GOVERNMENT LLC	📖		Email ⌄	▤	⊟
0000023129	Supplier		MAIN	CENTRAL COMPUTERS INC			Email ⌄	▤	⊟
0000022410	Supplier		MAIN	COMPUTERLAND SILICON VALLEY			Email ⌄	▤	⊟
0000022243	Supplier		MAIN	CORNERSTONE TECHNOLOGY PARTNERS II JV			Email ⌄	▤	⊟
0000030047	Supplier		MAIN	ConvergeOne, Inc.	📖		Email ⌄	▤	⊟
0000020897	Supplier		MAIN	DPP Tech Inc.			Email ⌄	▤	⊟
0000021099	Supplier		MAIN	DYNAMIC SYSTEMS INC	📖		Email ⌄	▤	⊟
0000040338	Supplier		MAIN	INSIGHT PUBLIC SECTOR INC	📖		Email ⌄	▤	⊟
0000030163	Supplier		MAIN	Intervision Systems LLC			Email ⌄	▤	⊟
0000012909	Supplier		MAIN	PRESIDIO NETWORKED SOLUTIONS GROUP LLC	📖		Email ⌄	▤	⊟
0000012107	Supplier		MAIN	ROBERT HALF INTERNATIONAL INC	📖		Email ⌄	▤	⊟
0000010886	Supplier		MAIN	SLALOM CONSULTING			Email ⌄	▤	⊟
0000010802	Supplier		MAIN	SOFTNET SOLUTIONS	📖		Email ⌄	▤	⊟
0000010447	Supplier		MAIN	STELLAR SERVICES INC			Email ⌄	▤	⊟

Search for Bidders   Save Bidders as Group

Save Event Changes ?   GoTo [＿＿＿＿] Go

11.	Once you have double checked the Sourcing Event and finalized all documents, you can now issue the solicitation. Please click **Post**; it will now route for your Departmental approval, and once it is approved, Proposers will be notified of the solicitation on the **Preview Start Date** and **Start Date** specified in Step #5.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* Event Settings and Options   Payment Terms and Contact Info
Event Comments and Attachments   Event Constraints
Event Header Bid Factors
Add an RFx Document

Step 2: Configure Line Items

Create line listings for this event.

* Line Items   Item Line Defaults

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event	Save As Template
Post	Preview PDF

II. Creating an Addendum/New Version of the Sourcing Event

12.	Whenever you need to make a change to the Sourcing Event, whether it is to extend the bid due date, upload a Q&A document, or upload an Addendum, you will need to create a "New Version" of the Sourcing Event. Please visit the following job aid for guidance, under "Changing a Bid Advertisement or Sourcing Event": https://sfemployeeportalsupport.sfgov.org/support/solutions/articles/11000022914-sourcing-events-and-bid-advertisements
	For every New Version of a Sourcing Event that is issued, please keep a historical record of the changes made and the date of the changes in the Event Description; I have included an example below:
	*** UPDATES ***
	05/01/2021: Version 2 of Sourcing Event ID # 0000005343 is for the following two (2) items:
	1. ADDENDUM No. 1, dated 05/01/21 has been issued and uploaded to this Sourcing Event. Addendum No. 1 is to:
	a) Extend the bid due date to 5/31/21 at 2:00PM (PST).
	2. Q&A Document dated 05/01/21 has been issued and uploaded to this Sourcing Event.
	*** END OF UPDATES **
	If you are extending the bid due date, make sure you also update the **End Date** as well.
14.	If you are uploading any documents as part of the New Version, go into the Event Comments and Attachments and follow guidance outlined in Step #8. In the **Attachment Description**, I would recommend including the date you are uploading the document (e.g. "Q&A Document Dated 5/1/21").

In addition, if any changes are made to the RFP document (e.g. change in scope of work, etc) that requires a new version of the RFP to be uploaded, make sure that your Attachment Description reflects the date of this revision (i.e. "TM P-690 Website Redesign Services RFP Dated 5.1.21") and that you uncheck the "Display to Bidder" box for the now outdated version of the RFP documents. This is so Proposers will only see the updated version of the RFP document when they view the Sourcing Event and not the old version.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

* Event Settings and Options	Payment Terms and Contact Info
Event Comments and Attachments	Event Constraints
Event Header Bid Factors	
Add an RFx Document	

Step 2: Configure Line Items
Create line listings for this event.

* Line Items	Item Line Defaults

Event ID 0000005364

Enter Comments ⓘ   View All   First ◀ 1 of 1 ▶ Last
                                                                    ➕ ➖
Comments:

Please carefully read all attachments, complete and include them with your bid submission:

- Revised TM P-696 Website Redesign Services RFP Dated 5/1/21
- Attachment #4 - City-Created Price Proposal Template
- Q&A Document Dated 5/1/21
- Addendum #1 Dated 5/1/21

☑ Send To Bidder   ☐ Include On Award   Standard Comments

[Add Attachment]

Attachments ⓘ   Personalize | 🗗   First ◀ 1-5 of 5 ▶ Last

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications		
SE_5364_TM_P-696_(04-21)_-_Request_for_Proposals.pdf	TM P-696 Website Redesign Services RF	☐	☐	☑	View	➖
SE_5364_Attachment_4_-_City-Created_Price_Proposal_Template.xlsx	Attachment #4 - City-Created Price Propo	☑	☐	☑	View	➖
SE_5343_Q_A_Document_Dated_5.1.21.pdf	Q&A Document Dated 5/1/21	☑	☐	☑	View	➖
SE_5343_Addendum__1_Dated_5.1.21.pdf	Addendum #1 Dated 5/1/21	☑	☐	☑	View	➖
SE_5364_REVISED_TM_P-696_(04-21)_-_Request_for_Proposals.pdf	TM P-696 Website Redesign Services RF	☑	☐	☑	View	➖

[OK]   [Cancel]   [Refresh]

15.	Once you are done with all the intended changes, you can now Post the Sourcing Event for Departmental approval, as outlined in Step #12.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* Event Settings and Options   Payment Terms and Contact Info
Event Comments and Attachments   Event Constraints
Event Header Bid Factors
Add an RFx Document

Step 2: Configure Line Items

Create line listings for this event.

* Line Items   Item Line Defaults

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

Event Collaborators

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event	Save As Template
Post	Preview PDF

III. Evaluating Proposals

16.	Once the Sourcing Event has ended, you can now evaluate all of the uploaded Proposals. Please reference the "**Analyzing and Awarding Sourcing Events**" document in the following job aid, specifically **Step 5A** of **Topic 1: Analyze Sourcing Events**: https://sfemployeeportalsupport.sfgov.org/support/solutions/articles/11000022914-sourcing-events-and-bid-advertisements. You will be looking for any documents the Proposers have uploaded, which will form the basis of your RFP evaluation and scoring.

IV. Issuance of Intent to Award

17.	Once you have completed your evaluation and determined the highest scoring Proposer, you will need to issue a Notice of Intent to Award to all invited Proposers. The Intent to Award template can be found on the OCA website: https://sfgov.org/oca/option-1-technology-marketplace-contracts. Please email the Intent to Award to **all the invited Proposers**; their contact information can also be found in the previous link under "Contact Information (TM Contact Information - Tier 1,2,3.xlsx)" After issuance of the Intent to Award, you will need to wait at least three (3) business days to allow for any potential protests.
18.	If no protests are received, you may proceed with next steps. **Please DO NOT award the Sourcing Event through Peoplesoft; instead, as done previously, please submit a requisition to OCA**, in accordance with the Appendix B: Technology Marketplace Checklist: Services, which can be found under How to Use the City's Technology Marketplace Suppliers (includes TM checklists). OCA will then review all of the documentation for completeness and issue the PO to the Supplier.