

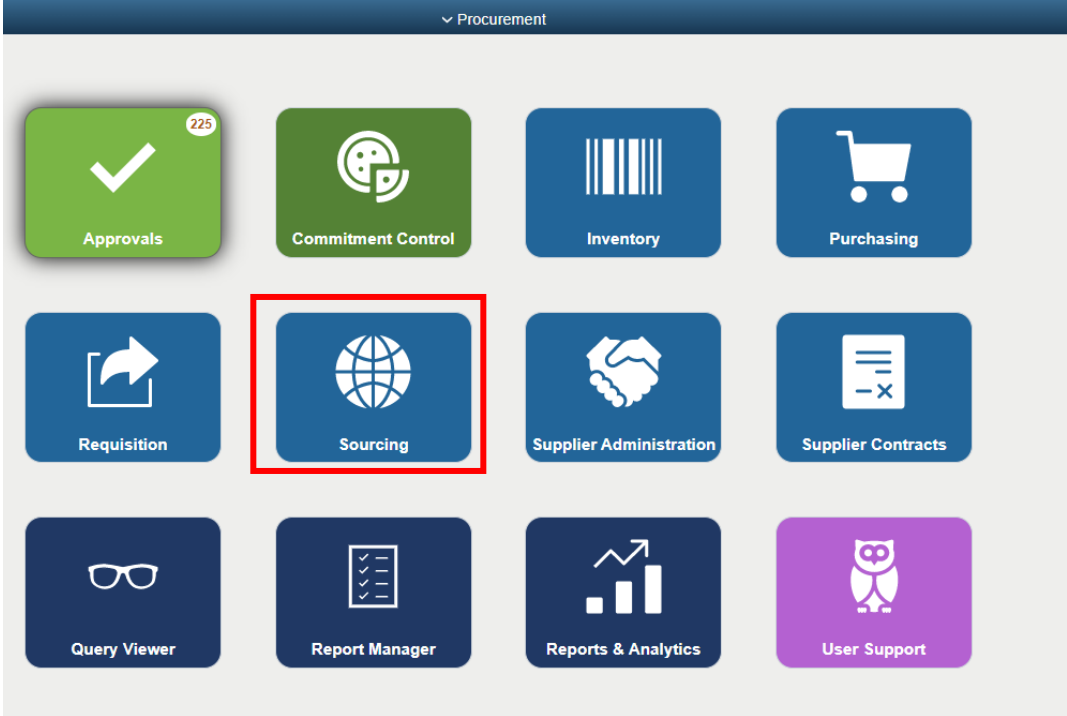
Guide on Creating a Sourcing Event for Technology Marketplace RFPs

Version 1.2 Dated September 2, 2021

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I. Creating a Sourcing Event for Technology Marketplace RFPs

Step	Action
1.	<p>To create a Sourcing Event, log into PeopleSoft, choose the Procurement homepage, and click on the Sourcing icon.</p> 
2.	<p>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.</p>

Procurement

Requisitions

Manage Events

Event Details

Event Workbench

Analyze Events

Create Bid Evaluation Report

Award Events

Event History

Create Events

Find an Existing Value | Keyword Search | **Add a New Value**

*Business Unit SFGOV

Event ID NEXT

Event Round 1

Event Version 1

Event Format Buy

Event Type RFX

Proxy Bidding (Auctions Only) Disabled

Add

Find an Existing Value | Keyword Search | Add a New Value

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**.

Create an Event

Event Summary

Business Unit SFGOV Event ID NEXT Round 1 Version 1 Event Format Buy

Event Type RFX Change to Auction

Event Status Open

***Event Name PUC | IT – Web Redesign Project**

Description

Time Zone POT

Preview Date 04/27/2021 Time 4:53PM

Start Date 04/27/2021 Time 4:54PM

End Date 05/27/2021 Time 4:54PM

Copy From Sourcing Event **Go**

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

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.

Select Criteria

Business Unit

*Copy Method

Event Type

Copy Criteria

Event ID

Event Name

Round

Bidder Type

Version

Bidder ID

SetID

Item ID

Category

Copy Event Factors/Constraints

Event Lines to Copy

Select All Deselect All

Sel	Item	Group ID	Description	Quantity	UOM	Price	Currency	Business Unit	Event ID	Due Date	Ship To
<input checked="" type="checkbox"/>			ENTER \$0.01 FOR YOUR UNIT PRICE	1.0000	LO	0.01000	USD	SFGOV	0000005201	05/03/2021	

Create Line Group

Create an Event

Line Items

Business Unit SFGOV Event ID NEXT Round 1 Version 1 Event Format Buy Event 1

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:

Copy From

Line Items ?

Basic Definition Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty
<input type="checkbox"/>	<input type="text"/>	ENTER \$0.01 FOR YOUR <input type="text"/>	<input type="text" value="92000"/>	<input type="text" value="LO"/>	<input type="text"/>

Event Total: 0.0100 USD

Group Selected Lines

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.

Create an Event

Event Summary

Business Unit SFGOV Event ID NEXT Round 1 Version 1 Event Format Buy

Event Type RFx Change to Auction

Event Status Open

*Event PUC | IT – Web Redesign Project.

Time Zone PDT

Preview Date 04/29/2021 Time 2:00PM

Start Date 04/29/2021 Time 2:00PM

End Date 05/27/2021 Time 2:00PM

Solicitation Point of Contact: [NAME], [EMAIL], [WORK NUMBER]

Description: 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.

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.

Sourcing Event [Go]

6. Now, click on **Event Settings and Options**. In the resulting page, check off the box for **Bid Required On All Lines**, uncheck the box for **Allow Split Analysis Review**, and enter "1" for the **Minimum Number of Bid Responses** 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.

Step 1: Define Event Basics

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

- [* Event Settings and Options](#)
- [Event Comments and Attachments](#)
- [Event Header Bid Factors](#)
- [Add an RFx Document](#)
- [Payment Terms and Contact Info](#)
- [Event Constraints](#)
- [Bid Analysis Review Sections](#)

Create an Event

Event Settings and Options

Business Unit SFGOV **Event ID 000005343** Round 1 Version 1 Event Format Buy Event Type RFX

Create PDF on Event Post
 Allow Bidder XML Downloads
 Bid Required On All Lines
 Allow Split Analysis Review
 Multiple Bids Allowed
 Allow Edit of Posted Bids
 Do Not Use Best Bids on New Rounds
 Display Bid Factor Ideal Value

Round/Version Display **Display Round and Version**

Sealed Event
 Display Bid Factor Weightings
 Display Bid Factor Best/Worst

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 **Number of days warning prior**

Associated Categories

Save Event Changes GoTo **Go**

[< Return to Event Overview](#)

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
- Event Comments and Attachments
- Event Header Bid Factors
- Add an RFX Document

Payment Terms and Contact Info
Event Constraints

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 Exchange Rate *Rate Type

Pay Method Rate Date

Payment Terms Allow bids in other currencies

Bill Addr 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

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

Step 2: Configure Line Items

Create line listings for this event.

- * Line Items
- Item Line Defaults

Enter Comments (2) View All First 1 of 1 Last

Comments:

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

- TM P-696 Website Redesign Services RFP
- Attachment #4 - City-Created Price Proposal Template

Send To Bidder Include On Award Standard Comments

Add Attachment

Attachments (2)

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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
SE_5364_Attachment_4_-_City-Created_Price_Proposal_Template.xlsx	Attachment #4 - City-Created Price Propc	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View

OK Cancel Refresh

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.

Step 1: Define Event Basics

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

- * Event Settings and Options
- Event Comments and Attachments
- Event Header Bid Factors
- Add an RFX Document

- Payment Terms and Contact Info
- Event Constraints

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

Modify an Event

Line Items

Business Unit SFGOV Event ID 000005343 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 Filtered View

Line Items First Last

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
<input type="checkbox"/> 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

[Return to Event Overview](#) GoTo

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
- Event Comments and Attachments
- Event Header Bid Factors
- Add an RFx Document

- Payment Terms and Contact Info
- Event Constraints

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 000005343 Round 1 Version 1 Event Format Buy Event Type RFx

Diversity Information

Public Event

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
Event Comments and Attachments
Event Header Bid Factors
Add an RFX Document

Payment Terms and Contact Info
Event Constraints

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 “Bid Advertisements 4.0”:
<https://sfemployeeportalsupport.sfgov.org/support/solutions/articles/11000077609-sourcing-events-rfis-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.

Modify an Event

Event Summary

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

Event Type RFX Change to Auction

Event Status Open Time Zone PDT

*Event Name PUC | IT - Web Redesign Project Preview Date 04/29/2021 Time 2:00PM

Description *** 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 ***

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

Start Date 04/29/2021 Time 2:00PM

End Date 05/31/2021 Time 2:00PM

Go

Copy From

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

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
- Event Comments and Attachments**
- Event Header Bid Factors
- Add an RFx Document

- Payment Terms and Contact Info
- Event Constraints

Step 2: Configure Line Items

Create line listings for this event.

* Line Items

Item Line Defaults

Event ID 000005364

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](#)

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	View
SE_5364_TM_P-696_(04-21)_-_Request_for_Proposals.pdf	TM P-696 Website Redesign Services RF	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
SE_5364_Attachment_4_-_City-Created_Price_Proposal_Template.xlsx	Attachment #4 - City-Created Price Propo	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
SE_5343_Q_A_Document_Dated_5.1.21.pdf	Q&A Document Dated 5/1/21	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
SE_5343_Addendum_1_Dated_5.1.21.pdf	Addendum #1 Dated 5/1/21	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View
SE_5364_REVISIED_TM_P-696_(04-21)_-_Request_for_Proposals.pdf	TM P-696 Website Redesign Services RF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	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
Event Comments and Attachments
Event Header Bid Factors
Add an RFX Document

Payment Terms and Contact Info
Event Constraints

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.	<p>Once the Sourcing Event has ended, you can now evaluate all of the uploaded Proposals. Please reference the “Sourcing Events v4.0” document in the following job aid, specifically Step 5A of Topic 5: Analyze Sourcing Events: https://sfemployeeportalsupport.sfgov.org/support/solutions/articles/11000077609-sourcing-events-rfis-and-bid-advertisements.</p> <p>You will be looking for any documents the Proposers have uploaded, which will form the basis of your RFP evaluation and scoring.</p>
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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.