Procurement Planning

• Develop Minimum Specifications and Estimate Total Dollar Value
• Determine Applicable Policies and Procedures
• Create and Procurement Team and Plan
• Draft a Statement of Work (SOW)
Estimating Total Dollar Value

• Total cost for each year of the project
• All reasonably foreseeable costs associated with that project payable to one vendor
  • Take into account recurring spend, if foreseeable
• If close to a competitive threshold err towards the higher amount
Determine Applicable Policies and Procedures

• Can you buy the goods/services from a QRF, an existing price agreement, or from the eProcurement system?
• Check the approvals list to determine any additional stakeholders
• Use the following flow chart to determine the correct procurement process
Buy Decision

Can you buy from a QRF?

Yes

Buy from QRF

No

Can you buy from an established Price Agreement?

Yes

Buy off Price Agreement

No

Is the purchase exempt or valued at under $25K?

Yes

Direct Procurement

No

Is this only available from a Sole Source?

Yes

Post and buy Direct

No

Is there a limited vendor pool?

Yes

Conduct AP

No

Is the total value less than $150K?

Yes

Conduct RFP/ITB*

No

Conduct RFP/ITB*

*An ITB is only appropriate when price is the only selection factor
Create a Procurement Team and Plan your Procurement

- This step scales to the scope of your procurement
  - Could be just you issuing a PO, may be a team of multiple UO departments and stakeholders
- Host a kickoff meeting
  - Invite team members (Dept. Staff, Campus Stakeholders, PCS Staff)
  - Agree on a procurement schedule based on applicable procurement process
  - Identify who will draft SOW and when it will be completed
  - Clearly identify roles and responsibilities
Create a Procurement Team and Plan your Procurement – Cont.

- Develop a BATNA
  - What happens if the procurement fails?
  - At what point are you willing to walk away from a vendor?
  - Divide needs from wants
  - Identify UO strategic interests addressed by the procurement.

- Notify applicable departments on the approvals list (invite stakeholders to the kickoff meeting if appropriate)