

# Procurement Planning

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- 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)
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# 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



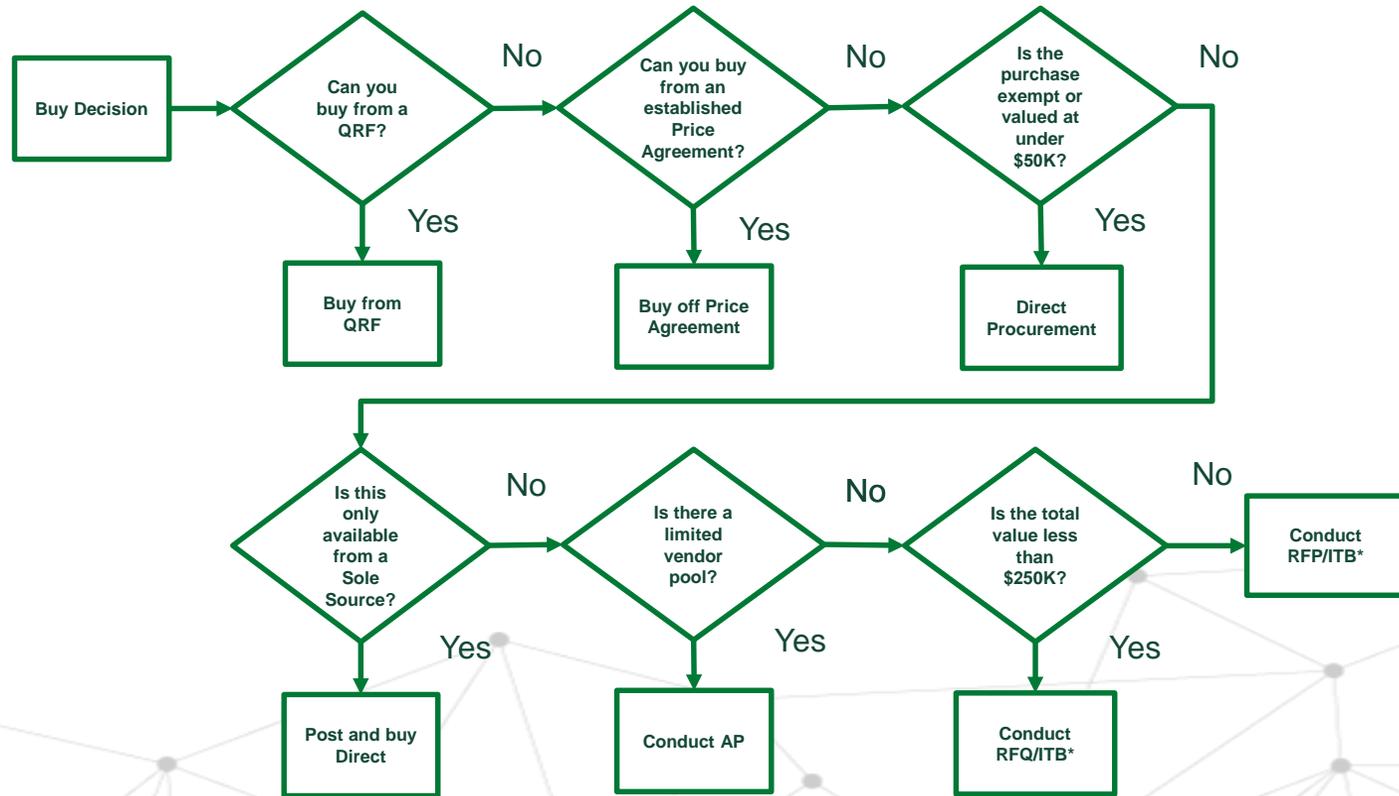
# Determine Applicable Policies and Procedures



- 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



# Procurement Planning Flowchart



\*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)

