Procurement Action Plan

Developing your procurement process



 **Planning**

**Purpose**: To identify critical path activities in the development of your procurement process.

**Directions**: Use this form as an input to map the entire projected timeline—how much time is required for each step, including approvals— to determine how many months will be required, and provide an opportunity to identify early where there may be roadblocks to proceeding (e.g., procedural timetables beyond your control; approval cycles that are fixed, etc.). This mapping process should also include time for program staff to learn or refresh their knowledge of basic contracting principles and requirements.

**Activity grid**: A project schedule or Gantt chart can be developed with the information provided in the matrix below.

| **Activity** | **Start date** | **End date** | **Responsible resource(s)** | **Support resource***(reviewer[s] or SMEs)* | **Communication plan***Who is informed?**How? How often/?* | **% complete** |
| --- | --- | --- | --- | --- | --- | --- |
| **Planning phase** |
| **Activity: Picking the team*** Project sponsors
* Core team
* Extended team
* State procurement contact/staff
 |  |  |  |  |  |  |
| **Activity: Research viable options and document decision**Types include: State/local, GSA or other federal procurement process, existing contract, another jurisdiction’s RFP |  |  |  |  |  |  |
| **Activity: Identify state standards/guidelines** |  |  |  |  |  |  |
| **Activity: Obtain/validate state templates/“gold standard”** |  |  |  |  |  |  |
| **Activity: Confirm RFP review/approval process and timelines** |  |  |  |  |  |  |
| **Activity: Develop procurement schedule including evaluation approach and submission logistics** |  |  |  |  |  |  |
| **Activity: Requirements*** Collect
* Prioritize
* Validate
 |  |  |  |  |  |  |
| **Request for information (RFI),** if applicable |  |  |  |  |  |  |
| **Solicitation phase** |
| **Activity: Draft SOW**Assign sections to:* Draft/revise
* Finalize
 |  |  |  |  |  |  |
| **Activity: Assign authors/reviewers for RFP sections*** Draft/revise
* Review
 |  |  |  |  |  |  |
| **Activity: Final review with DOH/state groups** |  |  |  |  |  |  |
| **Activity: Publish RFP** |  |  |  |  |  |  |
| **Activity: Respond to bidder questions*** Schedule/conduct pre-proposal conference, if applicable
* Review/respond to bidder questions
 |  |  |  |  |  |  |
| **Activity: Proposal evaluation*** Define approach, criteria and instructions
* Identify team
 |  |  |  |  |  |  |
| **Contracting phase** |
| **Activity: Contract*** Contract Type
* Template/provisions
* Create
* Negotiate
* Review
* Finalize
 |  |  |  |  |  |  |

**Evidence of success** *(How will you know that you are making progress? What are your benchmarks?)*

**Evaluation process** *(How will you determine that your goal has been reached? What are your measures?*

## Contact list

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Contact information***(phone and email)* | **Procurement****role** | **Notes** |
|  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Office/dept./agency** | *<Name of office>* | *<Name of office>* | *<Name of office>* | *<Name of office>* |
| What is their role? What authority and control do they have over which parts of the procurement? |  |  |  |  |
| When do they first need to be engaged? |  |  |  |  |
| Who is our point of contact? |  |  |  |  |
| What policies, requirements, templates or other factors do we need to adhere to? |  |  |  |  |
| What specific timelines and/or lead times do we need to include in our plan (e.g., for review and approvals)? |  |  |  |  |
| Who else in the health department has worked with them from whom we can learn? |  |  |  |  |
| *Other critical questions* |  |  |  |  |