Identifying the Appropriate Procurement Option

An interactive worksheet



 **Planning**

You may have a variety of procurement options available to you. Different options will likely involve different processes, timetables and organizations, and the funds you have available may not be suitable for every procurement option. Thoroughly researching your options now can save you re-doing work later.

Examples of procurement options which may be available to you include:

1. State/local procurement process
2. GSA or other federal procurement process[[1]](#endnote-1)
3. An existing contract which can be leveraged and extended to provide IIS-related products or services (e.g., MOU with a state institution of higher education; contract with a nonprofit organization with an existing relationship; jurisdiction IT services contract already in place)
4. Leveraging another jurisdiction’s procurement process or RFP

For each procurement option available or possibly available to you, document the advantages and disadvantages in terms of flexibility, simplicity, your capacity to deliver documentation/drafts within the timeframe dictated by the process, size or length of contract allowed, suitability for the funds you have available, and other factors of importance to you. You may want to rank each in terms of overall suitability for your purposes based on all the factors you selected.

Use the table below to document your findings. It is a good practice to document all such decisions in case there is a reason to question them or be reminded of the reasons why certain decisions were made.

# Worksheet: proposal evaluation team

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| **Option** | **Advantages** | **Disadvantages** | **Notes** | **Overall ranking** |
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## Considerations

* Carefully review the RFP, SOW, PWS and other templates you might or will be using. Get to understand the structure well, and make sure you understand each of the provisions, including the more formal legal narrative. You need to ensure you are not adding narrative to the RFP that conflicts with boilerplate language from the templates.
* It is important to investigate all procurement process options, such as those listed above, while recognizing that there may be different procedures, rules, timetables and requirements for each. Some alternatives may even have contradictory requirements.
* In many jurisdictions, local procurement staff have no role (or even interest) in leveraging federal procurement options that may be available, which may or may not simplify the procurement process.
* Once you have selected a procurement option, fully document the reasons for that selection, both to brief procurement project sponsors and for future reference.
* Someone on the procurement project team should be assigned to have a full understanding of every provision in the template(s) and boilerplate narrative being used and take responsibility for reconciling any differing/conflicting language between the draft statement of work and boilerplate language.
* Some paths may be difficult to back away from if you decide to change your strategy mid-course. Be sure to thoroughly understand the implications of pursuing different options (see the table above). For instance, make sure you can meet the strict timeline requirements of working with and through CDC for your procurement.
* Keep careful and precise records of all activities related to the procurement process. This will help you if questions come up later about whether you followed proper procedure or not.
1. The CDC IIS Support Branch (IISInfo@cdc.gov) can help get you started in understanding the procurement mechanisms available through CDC. The decision to use CDC IISSB staff depends in part on the ability of the jurisdiction’s procurement process to result in acquisition of the needed goods and services within an acceptable period of time and with the type of funds available. Note that some state/local agencies can use federal procurement options through GSA without CDC involvement – check with your procurement agency for details. [↑](#endnote-ref-1)