

Plan stage process overview:

The Plan stage encompasses several key processes in the procurement life cycle, ranging from identifying and defining a need to determining the most appropriate acquisition method that addresses that need. Key outcomes of the Plan stage are the creation of the procurement team and the development of the plan, which outlines the procurement approach and strategy.

1. Identify Need

This section describes need identification. Whether implementing a major budgeted project, supporting a program seeking specific needs to fulfill its mission, all procurements begin with a need.

2. Establish and manage the procurement file

This section includes information for establishing and managing a procurement file to document actions throughout the procurement life cycle.

3. Determine authority

This section describes statutory authorities, delegation of authority, and the roles and responsibilities of a requesting agency and a procuring agency, based on procurement authority.

4. Build procurement team

This section describes the function of developing a procurement team, when to do so, and the roles and responsibilities of the team members throughout the procurement life cycle.

5. Define need

This section describes the process of defining the procurement need which includes defining the scope of the procurement, identifying critical business requirements at a level of detail necessary to make procurement decisions, and performing market research.

6. Determine procurement method

This section describes methods of procurement reflecting source selection priority and competitive and non-competitive methods of procurement.

7. Develop and manage the procurement method

This section describes the planning of work products, the incorporation of outputs and decisions, and defines the process for managing changes to the plan. It also describes expectations required for work products to proceed to the next stage of the life cycle: Procure.

8. Conduct market research

This section describes the process and role of market research to identify available sources of supply for products and services, which informs the development of the procurement strategy. The Procurement Plan incorporates the market research findings.

9. Develop cost analysis/feasibility determination This section describes requirements for determining if a procurement will cost less than having the agency perform the service itself. This applies to a procurement that exceeds \$250,000 for services other than professional. The cost analysis informs the market research already conducted by assessing the feasibility of procurement and evaluating methods to strengthen price competition. The Procurement Plan includes the results of this process.

10. Determine contract type

This section describes standard types of contracts allowable in the state and considerations for their use based on results of market research, feasibility and cost analysis, project risk assessment and other factors.

11. Develop specifications

This section describes activities that translate customer requirements into detailed specifications or a scope of work that will be included in the solicitation document. The section discusses characteristics of a specification that influence quality, suitability, performance, evaluation and award criteria, and competitiveness.

12. Develop evaluation strategy (RFP only)

This section describes the process of developing an Evaluation Strategy including detailing the evaluation criteria, evaluation values, and the processes used to evaluate the proposals received. This section is only applicable when performing an RFP.