



**Your Company Name**  
**Procurement Plan**

Date

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## Revision History

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Date	Version	Author	Change

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*Note: Text displayed in blue italics is included to provide guidance to the author and should be deleted before publishing the document. In any table, select and delete any blue line text; then click Home→Styles and select “Table Text” to restore the cells to the default value.*

## **1 Introduction**

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*This document is a Procurement Plan, which provides procedures and information to acquire hardware, software, vendors or other needed items. A procurement plan helps to determine what to acquire, when, and how.*

*Note: Delete or indicate document sections that are not applicable.*

### **1.1 Purpose, Scope, and Objectives**

*Provide information about the purpose, scope, and objectives of this procurement plan, including the following:*

- *What is being purchased; including why, when, how and for who?*
- *Objectives of the purchase*
- *Process to be followed in the plan*
- *Activities in the process*
- *Plan procedures*
- *Scope of work, related work that is not included and optional work that could be beneficially provided by the supplier.*

### **1.2 Project Background**

*Provide information about the project and the reason for procurement of the hardware, software, vendors or other needed items.*

*Note: Provide a reference to the business case, future development or other documentation if relevant.*

### **1.3 Referenced Documentation**

*Provide information about all documentation referenced in this document, e.g., number, title, version, and date.*



Document Number	Version	Date	Document Name

## 2 Procurement Information

Provide general procurement information in the following table.

Topic	Description
Customer / Contract Manager	<i>Contact information for the individual and organization requesting procurement.</i>
Item(s) to be Acquired and Estimated Value	<i>An estimate of the items and contract / service value over the life of the contract to cover the items or the contract duration in a service contract.</i>
Duration of Contract or Service	<i>The contract period from contract commencement to the delivery of the final output, including any options to extend the contract beyond the core period.</i>
Market Capability	<i>An evaluation of the competitive environment including suppliers with the capability and capacity to meet your requirements.</i>
Risks	<i>Identify the relevant risks involved, e.g.,</i> <ul style="list-style-type: none"> <li>• <i>Business Risk, e.g., supplier's failure to deliver.</i></li> <li>• <i>Service / Operational Risk, e.g., managed by a 3rd party to design, build, finance or operate.</i></li> <li>• <i>External Risk, e.g., government regulations.</i></li> </ul>
Procurement Timeline	<i>When are the items needed?</i> <ul style="list-style-type: none"> <li>• <i>Prepare a timeline for the activities if necessary, e.g., main tasks and milestone dates for the completion of such tasks.</i></li> </ul>
Roles and Responsibilities	<i>Who is responsible for planning and acquisition?</i> <ul style="list-style-type: none"> <li>• <i>Evaluation Team including their strengths and weaknesses.</i></li> <li>• <i>Prepare a matrix of roles and responsibility if</i></li> </ul>



Topic	Description
	<i>necessary.</i>

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### 3 Procurement Strategy

Provide procurement strategy information in the following table.

Topic	Description
Pricing Strategy	<p><i>Identify the pricing method, e.g., fixed price, daily rate, target pricing, schedule of rates, arrangements for optional costs, payment stages, effect of e-procurement / e-trading, etc. Try to include all foreseeable costs.</i></p>
Dollar Limits	<p><i>Determine the dollar limits for simple purchases, e.g.,</i></p> <ul style="list-style-type: none"> <li>• <i>Purchases &lt; \$100: Refer to petty cash procedure.</i></li> <li>• <i>Purchases &lt; \$200: Processed through a direct pay agreement.</i></li> <li>• <i>Purchases &gt; \$200 or more: Processed through a purchase order requisition.</i></li> </ul>
Purchase Order Requisition Thresholds	<p><i>Consider using a threshold system, e.g.,</i></p> <ul style="list-style-type: none"> <li>• <i>Under \$2,000.00: Verify the information on the requisition.</i></li> <li>• <i>\$2,000.00 to \$9,999.99: Obtain written quotes, e.g., three suppliers / vendors.</i></li> <li>• <i>\$10,000 to \$19,999.99: Verify the information on the requisition, obtain 3 written quotes, and assign a timetable for the quote to be processed, award based on the evaluation criteria.</i></li> <li>• <i>\$20,000.00 and over: Use a competitive bid process.</i></li> </ul>
Procurement Method	<p><i>Determine the procurement method for the hardware, software, vendors or other needed items, e.g.,</i></p> <ul style="list-style-type: none"> <li>• <i>Purchase order</i></li> <li>• <i>Contract, e.g.,</i></li> <li>• <i>Competitive Bidding</i></li> <li>• <i>Competitive Sealed Proposals</i></li> <li>• <i>Design-Build</i></li> <li>• <i>Construction Manager</i></li> <li>• <i>Job Order Contracts</i></li> </ul>
Competitive Solicitation	<p><i>Determine the process for initiating and processing competitive solicitations, if applicable.</i></p>



Topic	Description
	<ul style="list-style-type: none"> <li>• <i>Invitation for Bids (IFB): Most responsible lowest bidder.</i></li> <li>• <i>Request for Proposal (RFP): Vendor offering the best value.</i></li> <li>• <i>Request for Qualifications (RFQ): Most highly qualified vendor.</i></li> </ul>

## 4 Glossary

The following table includes a glossary of all terms and abbreviations used in the document.

Topic	Description

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**5 APPENDIX**

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