

## Appendix B – Procurement Plan

### PART 1 – BUSINESS CASE

#### Business Unit

Identify the business unit responsible for the procurement plan.

#### Business Unit Project Lead

Identify the individual in the business unit that is primarily responsible for the procurement plan.

#### Initial Mapping Statement

Describe the procurement plan. What is being purchased?

**Background**

Describe any relevant background information. e.g. What gave rise to the need for the procurement plan? Is the procurement plan part of a larger project? What is the history of the project? What stage *is the project at?*

**Market Research**

Is further market research necessary to appropriately define the required goods or services?

Yes

No

*If yes, consult with the procurement area about the issuance of a Request for Information (RFI) prior to proceeding with the procurement plan.*

**Is there an Existing Standing Offer or Qualified Supplier Roster**

Has the business unit confirmed that there is no existing Standing Offer or Qualified Supplier Roster for the required goods or services?

Yes

No

*The business unit is responsible for consulting with the procurement area to determine if there is a Standing Offer or Qualified Supplier Roster already established for the goods or services it requires. If there is Standing Offer or Qualified Supplier Roster for the goods or services, the business unit must follow the Standing Offer Procedures or the Qualified Supplier Rosters Protocol.*

**Repetitive Procurement**

Are the goods or services required on a frequent or regularly recurring basis?

Yes

No

*If yes, consult with the procurement area about the possibility of establishing a Qualified Supplier Roster.*

**Major Project**

Does the business unit consider this a major project? Consider whether the procurement plan is of a value, complexity, risk level or profile that requires a significant allocation of attention and time from the business unit and procurement area, as well as potential involvement of other business units or stakeholders.

Yes

No

High Value

High Risk

Complex – multi-stage project or multiple stakeholders

High level of public interest and/or scrutiny

*If yes, respond to the following:*

Will external advisors be needed to assist with the development of specifications or business requirements? Consider whether sufficient internal resources are available.

Yes

No

If yes, please identify the type of external advisors needed:

Have your procurement area and legal services been advised that the business unit is planning a major project? They must be consulted early in the planning process to ensure procurement and legal issues and risks are addressed.

Yes

No

Will a fairness consultant be retained to oversee the procurement plan?

Yes

No

Is the major project is high-profile, controversial or involves a complex bidder selection process.

Yes

No

### Procurement Value

State the estimated value of the procurement plan.

### Funding Source

Identify the approved funding source sufficient to cover the procurement value.

### Business Unit Approvals

Do you have all necessary approvals to proceed with this procurement?

Yes

No

**PART 2 – DETAILED PROCUREMENT PLAN****Procurement Stream**

Select the appropriate procurement process in accordance with the Procurement Policy and complete and attach the specified plan(s).

 **Invitational Competition**

*Complete and attach Invitational Competition Strategy*

 **Open Competition**

*Complete and attach Open Competition Strategy*

 **Non-Standard Procurement**

*Complete plan outlining how the non-standard procurement will be managed. Attach ACAN Justification, Template and approval by delegated authority as well.*

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**Approval of Procurement Plan**

All procurement plans must be approved by the head of your procurement area and the business unit head, or their designates. All procurement plans involving a non-standard procurement must also be approved in accordance with the procuring entity's procurement approval and signing authority policies and procedures.

**Approved by Business Unit Head or Designate:**

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*Signature* *Date*

Title:

Name:

**Approval by Head of Procurement Area or Designate:**

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*Signature* *Date*

Title:

Name:

***For Non-Standard Procurement only:***

**Approved by Delegated Approval Authority:**

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*Signature*

*Date*

Title:

Name: