



RR Date: _____ Project No. _____ Task No.: _____	Labor Charge Codes Project No. _____ Task No.: _____
	Advertising Charge Codes Project No. _____ Task No.: _____

**INDIVIDUAL PROCUREMENT PLAN**  
**Required for all procurements above the Small Purchase Threshold**

**CONTRACT TITLE:** \_\_\_\_\_

**CONTRACT No.:** \_\_\_\_\_

**PROJECT MANAGER:** \_\_\_\_\_ **CA:** \_\_\_\_\_

**PROJECT DESCRIPTION:**

**FUNDING: Requisition #:** \_\_\_\_\_ **Amount:** \_\_\_\_\_

Federal             State/Local             FHWA

Other \_\_\_\_\_

**INDEPENDENT COST ESTIMATE: \$** \_\_\_\_\_

**PROCUREMENT METHOD:**

IFB - Lowest Price     IFB – 2 Step: Technically Acceptable, Lowest Price

RFP 2 Step: Technically Acceptable, Lowest Price

RFP – Best Value Technical Trade-off     RFP – Performance Price Trade-off

RFP Best Value- Numerically Scored (explicit factors),  
Is Cost Factored     YES  NO

RFP – A&E Procurement (Calif. Govt Code 4525)     RFIQ

Non-Competitive     Other- \_\_\_\_\_

**Rationale For Selection:**

(Identify basis for selected procurement type, the proposed evaluation criteria; associated points, if applicable, and explain how criterion relates to an objective evaluation. If numerical scoring, including a weight for cost/price, is to be used, identify specific percent for cost/price and provide brief rationale for proposed percentage. If using a Best Value Technical or Performance Trade-offs, explain the cost basis for proposed trade-offs. **Finally, include a description of the proposed evaluation process and be prepared to discuss how the process will be described in the solicitation document and then followed by the Source Selection Team.**)

**IDENTIFY POTENTIAL COMPETITION/ SOURCES FOR SERVICES:**

VENDOR NAME	VENDOR NAME

**PRIOR PROCUREMENT HISTORY:**

Prior Related Procurement No.: \_\_\_\_\_

- Discuss Lessons Learned
  
- Any protests received:  Yes       No
- Discuss reasons for protest :
  
- Small Business (DEOD) Goal (on prior procurement): \_\_\_\_\_ %

**SMALL BUSINESS (DEOD) GOAL:** \_\_\_\_\_ %

**BOILERPLATE ISSUES:** Identify any deviations or special clauses needed in Contract Terms & Conditions for this procurement:

**SAFETY COMPONENT:** Identify the inclusion of any additional safety provisions that are included beyond the boilerplate safety provisions.

- Are there any Hazardous Materials included in this solicitation?  YES  NO
- If yes, please coordinate with Corporate Safety. Provide details of additional requirements Safety department needs included in solicitation.
- **Has the Scope of Work has been reviewed by Corporate Safety? Include evidence that this review has occurred.**

**INFORMATION TECHNOLOGY REQUIREMENTS:** For all procurements including computer equipment, computer systems or software systems, attach a copy of the IT-7 approval.

**INSURANCE:** Appropriate type and level of insurance selected for the Contract (contact Risk Management as necessary)  YES  NO?

**PRE-BID OR PRE-PROPOSAL INFORMATION:**

Will there be a Pre-Bid or Pre-Proposal Conference?  YES  NO

Any special concerns/considerations:

**SOURCE SELECTION EVALUATION TEAM** (not required for IFB-Lowest Price or Non-Competitive):

NAME	TITLE	DEPT

**CONTRACT TYPE:**

- FFP     
  COST REIMB.     
  T&M     
  UNIT RATE  
 IDIQ     
  OTHER \_\_\_\_\_

**WHY WAS CONTRACT TYPE CHOSEN:** (For T&M, explain why no other form of contract is suitable):

**PERIOD OF PERFORMANCE:**

(i.e. 5 year, 3 year with two one year options) \_\_\_\_\_

Reason for choice:

**CONTRACTOR’S DELIVERABLES AND PAYMENTS:**

- Deliverables: What are the deliverables and are they specifically stated in the SOW?
- Payment: How will the Contractor be paid? If progress payments, how are the payments tied to the deliverables and how is progress measured?

**OVERALL SUMMARY OF RISKS/CHALLENGES:** Discuss risks and challenges to successful completion of this procurement (ie. technical, cost or schedule issues).

**ADDITIONAL INFORMATION:**

Contract Administrator:

Reviewed by:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Manager of Contracts

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Concurrence from Readiness Review Meeting:

\_\_\_\_\_  
Chair

\_\_\_\_\_  
Co-Chair

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Attachments: Statement of Work  
Independent Estimate  
Signed Procurement Schedule  
RFP Evaluation Criteria, if applicable  
Non-Competitive Justification, if applicable  
Draft Board Report for 2/3 finding for §130234 or §130238

**POST SOLICITATION / PRE-AWARD MANAGEMENT REVIEW**

PROPOSED AWARDEE: \_\_\_\_\_

BASIS OF AWARD:

LOW RESPONSIVE, RESPONSIBLE BIDDER - Attached Bid Tabulation Form

RFP – Attach copy of the Source Selection Decision Document

Note – Be certain that the documentation provides the basis for the determination that the pricing is “fair and reasonable.”

By signing below, the Contract Administrator is certifying that the Source Selection process was conducted in accordance with the published evaluation process.

APPROVAL ACTION REQUIRED:

BOARD APPROVAL REQUIRED – Attached copy of Board Report

CEO APPROVAL REQUIRED – Attach copy of Approval Memo (Request for Approval - Acquisition Action)

OTHER APPROVAL - \_\_\_\_\_ Name of Approver  
Attach copy of Approval Memo

**Submit electronic copies of the resulting contract and each of the above documents to Executive Officer, Procurement and Material Management.**

Contract Administrator:

Reviewed by:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Manager of Contracts

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date