



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