

PSPP 201: Planning

This interactive course is delivered as a 2-day classroom workshop and in an online format. It provides participants with a detailed understanding of the steps, considerations and documentation needed to ensure that adequate planning is done for procurement and contracting processes. The course covers the importance of a thorough market assessment when preparing a procurement plan, and how to select the most appropriate solicitation methodology and minimize risk when setting up the evaluation and selection process.

The elements of a basic business case are discussed, along with cost benefit analysis considerations. Key legal issues, such as intellectual property and conflict of interest, are explored, and the importance of maintaining good vendor relationships throughout the procurement and contract management cycle is emphasized.

Topics

- Needs assessments, business case planning, and cost benefit analysis
- Drafting contract terms of reference and contract management plan
- Typical steps in obtaining approvals
- Risk identification (includes solicitation risk and contract risk), on-going risk management, treatment, mitigation strategies
- Defining contract scope for goods, services and construction, including drafting service level agreements (SLAs), inputs/outputs and outcomes
- Options and considerations when designing procurement strategy, including any prequalification processes
- Overview of intellectual property, agency law, personal liability, conflict of interest and other legal considerations
- Best practices in vendor relationship management, and incorporating into procurement and contract planning
- Corporate reporting procedures and requirements

Learning Objectives

- Practice how to design appropriate evaluation criteria and weighting
- Describe the steps to obtain approvals to issue the solicitation
- Practice conducting a needs assessment, cost benefit analysis and risk assessment
- Review and discuss how to design a procurement strategy and process
- Define solicitation terms
- Discuss how to draft the Contract B framework
- Identify best practices and legal obligations in the planning phase of procurement
- Identify document retention requirements and other requirements to comply with corporate policy

Expected Outcomes

Upon completion of this course, participants will have the necessary knowledge and tools for the planning phase of the procurement and contract management cycle. They will be able to clearly articulate the contract or project requirements, prepare a thorough procurement plan, ensure appropriate approvals are in place and prepare to embark on an effective procurement process.

Pre-requisites

PSPP 101 (highly recommended)



Public Sector Procurement Program

PSPP courses are easily adapted for in-house delivery to public organizations across Canada and can be delivered online or in the classroom. For a collaborative approach, local groups can partner to host a shared training initiative.

Courses can be customized to address regional or organizational templates and nuances to ensure training is relevant and tailored to meet your needs, while preserving the integrity of the competency structure of the program.

Contact Us:

Learn more about what The Procurement School could do for your organization:

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