**Procurement plan xtra-lite template**

**Between $5,000 to $50,000**

Agency instructions

* This template is intended for procurements valued between $5,000 to NZ$50,000.
* Your agency may customise this template to reflect its practice and requirements – especially the approvals section.
* When customising, consider including user instructions like the example given below. Note that the yellow highlighted areas specify where to customise.

**Selecting a New Zealand business**

Unless there is a good reason not to, it is expected that procurements should be awarded to New Zealand businesses that are capable and have capacity to deliver the contract below the value thresholds of:

* $100,000 for goods, services and refurbishment works;
* and $9 million for new construction works.
* Example of user instructions
* A procurement plan describes the process used to approach the market, evaluate bids and identify the recommended supplier. This template is designed to be used for very low-value low-risk procurements between $5,000 to NZ$50,000. Procurements valued less than $5,000 do not need a procurement plan. However, you must ensure that you have written approval of the scope, delivery date, and budget.
* This template covers the common elements usually included in a procurement. However, you will need to tailor it to your needs. Keep it simple – the level of analysis and detail you include should be proportionate to the nature, scope, value, complexity and risk of the procurement.
* A procurement plan should / must be completed and approved before initiating your tender process (e.g. advertising on GETS). You will need approvals from:
* project sponsor, for authority to proceed to market
* delegated financial authority holder, for authority to spend (if different from sponsor).
* If you would like assistance in preparing your plan, or a constructive peer review of your draft, please contact [enter contact details for the procurement team].

|  |
| --- |
| [Insert agency logo] |
| Procurement plan xtra-lite |

[Name of project]

**What we are buying and why**

|  |  |
| --- | --- |
| Key information | Detail |
| Background: | Provide a short description of the context for this procurement, including any previous contract arrangement. |
| Short description of goods/services: | Provide a short succinct description of the goods or services to be purchased. What are the key deliverables? What are the key milestones? What’s in scope and out of scope? Describe any minimum standards or mandatory criteria. Confirm basis of payment e.g. on invoice or on completion of milestones. List key risks and how these will be mitigated and managed. |
| Dates: | * Contract start date: dd mm year. * Contract end date: dd mm year. |
| Contract type: | * [Choose: Government Model Contract / Government Model Contract Lite / Purchase Order]. |
| Estimated whole-of-life cost: | * $x,xxx (excluding GST). |
| Expense category: | * Opex: $x,xxx. * Capex: $x,xxx. * Cost centre code: xxxx. |
| Budget approved by delegated financial authority holder: | * Yes /no. * Name. |

**Procurement method**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Three phone quotes | Three written quotes | Closed tender | Direct source supplier | Extension of contract | Select panel supplier |
| 🗸 | 🗸 | 🗸 | 🗸 | 🗸 | 🗸 |

**Tender evaluation panel members**

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Voting | Name | Organisation |
| Chair of evaluation panel: | 🗴 |  |  |
| Business group / owner: | 🗸 |  |  |
| User group / beneficiary: | 🗸 |  |  |
| Subject matter expert: | 🗸 |  |  |

**Evaluation methodology**

The evaluation model that will be used is weighted attribute as per the table below. Price will not be a weighted criterion. Instead price will be taken into account in determining overall value for money over the whole-of-life of the contract. A two envelope process will be used and suppliers’ pricing will only be opened once the criteria scoring is completed.

**Evaluation criteria**

|  |  |
| --- | --- |
| Criterion | Weighting |
| **Technical merit (fit for purpose)** |  |
| E.g. Degree to which good/services meet or exceed requirements | **30%** |
| E.g. Quality of goods/services | **10%** |
| **Capability of the supplier to deliver** |  |
| E.g. Supplier’s size, structure and annual turnover | **5%** |
| E.g. Track record in delivering similar goods/services | **15%** |
| E.g. Understanding of the requirements | **25%** |
| E.g. Operational and financial systems to manage delivery | **15%** |
| **Total weightings** | **100%** |

**Indicative timeline**

Please note that the following example is for a single-stage tender.

|  |  |
| --- | --- |
| Action | Indicative date |
| Tender release date: |  |
| Tender closing date: |  |
| Tender panel recommendation date: |  |
| Negotiations completed: |  |
| Advise unsuccessful suppliers: |  |
| Supplier debriefs: |  |

**Approvals**

|  |  |
| --- | --- |
| Project sponsor | |
| Approval: | Approval to proceed to tender and identify the preferred supplier. |
| Name: |  |
| Position: |  |
| Date: |  |
|  |  |
| Holder of delegated financial authority | |
| Total budget approved: | [Insert: total cost over whole-of-life NZ$] |
| Cost code: |  |
| Name: |  |
| Position: |  |
| Date: |  |