1. **PROCUREMENT TYPE:** Which of the following best describes this project?

□ Renewal/Upgrade: This procurement will be to renew or upgrade an existing product or service

□ New: This procurement will be to contract to a new product or service

1. **CATEGORY:** Which of the following best describes this project?

□ Software or IT

□ Skill Development (Education, Training, Coaching)

□ Assessment/Analysis (Technology/Engineering/Data)

□ Assessment/Analysis (Business/Operational)

□ Facilities Operations & Maintenance

□ Facilities Construction & Renovation

□ Professional Services / Consulting

□ Long-Term Service Providor

□ Other (please describe): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **DESCRIPTION:** Provide a high-level overview of what you are looking to procure

|  |
| --- |
| Provide brief narrative (1-3 sentences maximum) |

1. **PREFERRED PATHWAY:** Identify the preferred solicitation approach

□ Sole source to the current bidder/product

□ Sole source to a new bidder/product

□ Go to market and select the best-available bidder/product

□ Unsure

1. **COMPETITION:** If you are not looking to ‘sole-source’ this contract, can you identify how many bidders you believe can reasonably meet the minimum requirements (this can be your best guess)

□ Unsure

□ Only 1

□ 2-4

□ 5-7

□ 8-10

□ 11 or more

1. **CONTRACT EXPECTATIONS:** Identify how many contracts are expected to be signed for this project:

□ 1 Contract (plan to select to 1 single bidder to provide everything we need)

□ More than 1 Contract (we need multiple different bidders to handle different parts of the scope)

□ Unsure (we need more information)

1. **CRITICAL TIMELINES:** Identify any critical dates that are important for this project (identify all that apply)

|  |  |
| --- | --- |
| Date the current Contract expires (put ‘N/A’ if not applicable): | DD-MM-YYYY |
| Date the new Contract needs to be signed by (put ‘N/A’ if not applicable): | DD-MM-YYYY |
| For software/IT project: Targeted Date for “Go-Live” (put ‘N/A’ if not applicable): | DD-MM-YYYY |

Insert any additional dates that are important for this project/service:

|  |  |  |
| --- | --- | --- |
| **ITEM** | **DESCRIPTION** | **DATE** |
| #1 | Insert brief description of the information (1-sentence)  | DD-MM-YYYY |
| #2 | Insert brief description of the information (1-sentence)  | DD-MM-YYYY |
| #3 | Insert brief description of the information (1-sentence)  | DD-MM-YYYY |

1. **ANTICIPATED BUDGET:** Identify your financial expectations:

|  |  |
| --- | --- |
| Do you have an approved/allocated budget? | □Yes | □No |
| If ‘Yes’, what is your total budget for this project: | $$$,$$$ |
| If ‘No’ identify the anticipated spend of this project (best guess is fine!) | $$$,$$$ |

What was the basis of how this budget/estimate was set?

|  |
| --- |
| □ Historic Spend □ Market Research □ Consultant Feedback □ Other □ Unsure |

|  |  |
| --- | --- |
| If this project/service has been procured before in the past (at W&R), what was the total cost of the previous implementation (final cost not contracted cost) | $$$,$$$ |

For Software & IT Procurements, please identify the budget for the initial implementation versus the annual reoccurring costs:

|  |  |
| --- | --- |
| Budget for implementation | $$$,$$$ |
| Budget for annual reoccurring costs (licensing, support, maintenance, etc.)  | $$$,$$$ |

Identify your level of ‘confidence’ that your approved budget can deliver your needs?

|  |  |
| --- | --- |
| Low Confidence*(Budget will not meet all of our needs)* | High Confidence*(Budget will be more than enough to meet our needs)* |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| □ | □ | □ | □ | □ | □ | □ | □ | □ | □ | □ |

1. **CONTRACT TERM:** Identify the expected term of this contract.

|  |  |
| --- | --- |
| Will this Contract have a term limit? | □Yes | □No | □Unsure |
| If yes: What is the expected ‘initial’ term of the contract? | ## Years |
| If yes: Will there be options to renew? | □Yes | □No | □Unsure |
| If yes: what is the ‘total’ term of the contract including all renewals? | ## Years |

1. **CORE TEAM:**

|  |  |
| --- | --- |
| Have you established a ‘core’ project team that will serve as subject matter experts and/or evaluators during the procurement process? | □Yes | □No | □Partially |
| Briefly list the core team members / departments here:* Insert
* Insert
* insert
 |

1. **EXPERIENCE:** Provide the following:

|  |  |
| --- | --- |
| How many times has W&R procured this type of product/service in the past 3 years? | # |
| How many times have you procured this product/service in the past 3 years? | # |
| How many times has your core team procured this product/service in the past 3 years? | # |

If this service has been procured before in the past at W&R, what has been the overall level of performance of this service. Please rate on a 0-10 scale as defined below:

|  |  |
| --- | --- |
| 0=Low Performance / Satisfaction*Project had significant quality issues**Project had significant cost increases**Project was completed later than expected* | High Performance / Satisfaction=10*Project had no quality issues**Project had no cost increases**Project was completed on-time* |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| □ | □ | □ | □ | □ | □ | □ | □ | □ | □ | □ |

What is your level of ‘confidence’ that you and your core team will know exactly what information bidders will need to see in the Scope of Work to generate an accurate cost proposal?

|  |  |
| --- | --- |
| Low Confidence*(Not sure what bidders need)* | High Confidence*(Know exactly what bidders need to see)* |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| □ | □ | □ | □ | □ | □ | □ | □ | □ | □ | □ |

1. **OTHER:** Identify any other critical information that Procurement should be made aware of (if any).

|  |
| --- |
| Insert as applicable |