



Building a Procurement Schedule

OVERVIEW

One of the best ways to learn about creating an effective procurement schedules is to actually create one! Every procurement has different and unique constraints. Below, you are provided with three (3) scenarios. Your task is to make a schedule for each scenario and include any notes/special considerations.

CPE’S RECOMMENDED PROCUREMENT ACTIVITIES AND DURATIONS

Please consider the following typical timelines when you prepare your schedules:

| ACTIVITY | TYPICAL DURATION |
|--------------------------------|--|
| ADVERTISEMENT PERIOD | 4-6 weeks |
| Pre-Proposal Meeting | 1 week after RFP release |
| Site-Walk | Same day as Pre-proposal meeting <i>[if needed]</i> |
| Questions Due | 2-4 weeks after RFP release |
| Answers Posted | 1 week after Questions Due |
| Proposal Due Date | 1-2 weeks after Answers Posted |
| EVALUATION PERIOD | 6-14 weeks |
| Proposals Evaluated | Completed 2-4 weeks after proposal submitted |
| Initial Shortlist | 1-5 days after proposals evaluated |
| Shortlist Notification | 1-10 days after shortlist complete |
| Interviews | 1 week after Shortlist Notification <i>[if applicable]</i> |
| Identification of Best Offeror | 2-7 days after Interviews |
| Contract Negotiations | 2-6 weeks after Identification of Best Offeror |
| AWARD DATE | 1 day |

Note for scenarios below:
Public Policy states that the Solicitation must be advertised for a minimum of 4-weeks

SCENARIO #1

Create a schedule for the following scenario. Consider the General Procurement Guidelines as it relates to the User's constraints (identified below):

Your Client/End User has contacted you about a project that they need awarded. Today's date is January 1. The User would like to hire an electrical contractor to upgrade lighting throughout a building. This is a fairly simple and straightforward project (not a lot of risk). The anticipated size of the work is about \$100,000. The User has already prepared a detailed scope-of-work and is ready to move forward with issuing the RFP Solicitation. The User needs to have the project awarded by March 31st, so the contractor can try to complete the work by end of summer.

| ACTIVITY | START | END |
|--------------------------------|-------|-----|
| ADVERTISEMENT PERIOD | | |
| Pre-Proposal Meeting | | |
| Site-Walk | | |
| Questions Due | | |
| Answers Posted | | |
| Proposal Due Date | | |
| EVALUATION PERIOD | | |
| Proposals Evaluated | | |
| Notification of Shortlist | | |
| Interviews | | |
| Identification of Best Offeror | | |
| Contract Negotiations | | |
| AWARD DATE | | |

Comments:

SCENARIO #2

Create a schedule for the following scenario. Consider the General Procurement Guidelines as it relates to the User's constraints (identified below):

Your Client/End User has contacted you about a project that they need awarded. Today's date is June 2. The User is looking to renew an existing contract for Janitorial Services throughout your 7 buildings. The current contract has been in place for 5-years, and is set to expire on September 15th. So a new contract must be in place before then. Although this is not a very complex service, it is very critical to get a good team/provider. Also, the anticipated size of the work is about \$10 Million, over a 5-year term. The User would like to have this project awarded by the end of August. They will also be taking a 2-week vacation on Aug 3-14 (and will not be able to do any activities during this time period. The User has not drafted their scope of work, but is confident it will be done within the next 3-4 weeks).

| ACTIVITY | START | END |
|--------------------------------|-------|-----|
| ADVERTISEMENT PERIOD | | |
| Pre-Proposal Meeting | | |
| Site-Walk | | |
| Questions Due | | |
| Answers Posted | | |
| Proposal Due Date | | |
| EVALUATION PERIOD | | |
| Proposals Evaluated | | |
| Notification of Shortlist | | |
| Interviews | | |
| Identification of Best Offeror | | |
| Contract Negotiations | | |
| AWARD DATE | | |

Comments:

SCENARIO #3

Create a schedule for the following scenario. Consider the General Procurement Guidelines as it relates to the User's constraints (identified below):

Your Client/End User has contacted you about a project that they need awarded. Today's date is October 26. The User is looking to purchase a new software system to replace the Organization's current Human Resources system. This will be a complex upgrade since the current system has been in place for over 10 years and very risky since it also deals with internal payroll and finances. The anticipated size of the work is about \$1-\$2 Million. The User would like to have this project awarded ASAP since they are concerned that the existing system will no longer be serviceable by January 1. Therefore, this contract must be awarded by the end of the year. The User has a good idea of what they need to include in the scope of work, which should be ready to issue in about 2-weeks.

| ACTIVITY | START | END |
|---------------------------------------|-------|-----|
| ADVERTISEMENT PERIOD | | |
| Pre-Proposal Meeting | | |
| Site-Walk | | |
| Questions Due | | |
| Answers Posted | | |
| Proposal Due Date | | |
| EVALUATION PERIOD | | |
| Proposals Evaluated | | |
| Notification of Shortlist | | |
| Interviews | | |
| Identification of Best Offeror | | |
| Contract Negotiations | | |
| AWARD DATE | | |

Comments: