

SAMPLE FORMAT

PROCUREMENT PLAN FOR THE _____ OFFICE
FOR THE YEAR 19__

STEP-1 - LIST OF CURRENT CONTRACTS AND PURCHASE ORDERS
Include FO and AMB/PM and separate by similar
goods/services (Continue on as many sheets as necessary)

DESCRIPTION	CURRENT TERM EXPIRES	AMB, PM, BPA, OPEN ENDED PO, INDIVID. C/PO, ETC.	PROCURED BY IFB,RFP SOLE SOURCE	ANNUAL COST APPROX
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PROCUREMENT PLAN FOR THE _____ OFFICE
FOR THE YEAR 19__

STEP 2 - EVALUATION

- a. Do costs for similar services vary in this office?
No ___ Yes ___ If Yes, why?
- b. Do costs for similar services vary in this office from
other HUD offices with similar inventory? No ___ Yes ___
If Yes, why?

List other offices checked: _____

- c. Are current methods of procuring goods and services the
least costly/most efficient, or do they lead to wasteful
actions such as bid-splitting, non-competitive procurements,
unauthorized procurements No ___ Yes ___ If No, why?
- d. Could the HUD staff and AMB/PM administrative burden be
reduced by using other procurement methods, especially replacing
individual purchase orders with formal contracts, blanket
purchase orders, etc. No ___ Yes ___
If Yes, which items could be procured more efficiently?
1.
2.
3.
4.

- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

APPENDIX 1

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FOR THE YEAR 19__

STEP 3 - PROJECTED INVENTORY AT THE END OF EACH FISCAL QUARTER
Separate out by AMB/PM areas
(Continue on as many sheets as necessary)

Fiscal Quarter	Number of houses by AMB area	Number of projects/units (include MIP, accuired)	Comments
4th			
1st			
2nd			
3rd			

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STEP 4 - PLAN
Use information provided in Steps 1-3)
(Continue on as many sheets as necessary)

DESCRIPTION OF SERVICES NEEDED	AMB, PM, BPA, INDEF.DLVY.PO, INDIVID. C/PO, ETC.	PROCURED BY IFB,RFP RFP,SOLE SOURCE	PROJECTED START DATE	ATTACHMENT NUMBER

COMPLETE THE FOLLOWING FOR THE LAST PAGE OF THE PLAN:

PREPARED BY: _____ APPROVED BY: _____
DATE: _____ DATE: _____

REVIEWED AND UPDATED BY CPO/CO

1ST QUARTER _____ 2ND QUARTER _____
DATE _____ DATE _____

3RD QUARTER _____ 4TH QUARTER _____
DATE _____ DATE _____

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APPENDIX 1

INDIVIDUAL PROCUREMENT PLAN FOR CONTRACTS OVER \$25,000

SOLICITATION TYPE ___IFB ___ RFP ATTACHMENT ___

DESCRIPTION OF GOODS/SERVICES NEEDED

Estimated total cost for initial term and all option periods
\$ _____

	ORIGINAL TARGET DATE	REVISED TARGET DATE	COMP DATE	NOTES

Specifications developed..... _____
 Request for contract/PO to CO..... _____
 Justification for other than
 full and open competition completed
 Synopsis published in CBD..... _____
 Solicitation issued (#) _____

IFB: pre-bid conference..... _____
 bids received..... _____
 determination of responsiveness
 and responsibility completed.. _____
 if needed, letter to SBA for COC
 reply from SBA..... _____

RFP: pre-proposal conference..... _____
 TEP/SEB appointed..... _____
 proposals received..... _____
 evaluation started..... _____
 evaluation completed..... _____
 negotiations completed..... _____

Contract awarded (#) _____

Contract effective date _____

PREPARED BY: _____ APPROVED BY: _____

DATE: _____ DATE: _____

REVIEWED AND UPDATED BY CPO/CO

1ST QUARTER _____ 2ND QUARTER _____
DATE _____ DATE _____

3RD QUARTER _____ 4TH QUARTER _____
DATE _____ DATE _____

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