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Phase 1 of 3: Planning procurement

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Receive requisitions

When Public Services and Procurement Canada (PSPC) buys goods or services on behalf of a client department or agency, the client must submit a requisition. A completed requisition form ensures that the requisition will be assigned to one of PSPC's procurement officers in a timely manner.

The following are the steps the client will need to take to complete and submit their requisition:

- Get the [Form 9200 Requisition for Goods and Services and Construction](#) from the Forms catalogue (accessible only on the Government of Canada network)
- Verify that the requisition is complete using the [Requisition checklist](#) (accessible only on the Government of Canada network)
- Complete any required Security Requirements Checklist (SRCL) electronically using the [Online Industrial Security Services](#) (OLISS)
- Attach any relevant technical documentation or statement of work
- Send the completed requisition to PSPC's Allocation Unit by email and to the appropriate Allocations Unit in their area

Review the requisition

Before reviewing a submitted requisition form, you will need to acknowledge that you have received the client's request. This should be done within five business days of receiving the form. Use the [Requisition checklist](#) (accessible only on the Government of Canada network) as a guide to review the requisition form and make sure it includes all the necessary information to start the buying process.

Questions to consider when reviewing:

- Is the requisition properly authorized?
- Does the estimated funding seem adequate?
- Are the financial codes identified?
- Are invoicing and shipping instructions provided?
- Have green procurement considerations been addressed?
- Is the requisition subject to the Comprehensive Land Claims Agreements?
- Has the SRCL been included, if applicable?
- Are the dates and timetables proposed realistic?
- Are the goods or services adequately defined in the requisition or attached technical documentation?

Define the requirement

Before continuing the buying process, it is important that both you and the client are clear on the requirement of the procurement. Identifying the needs and carefully developing the requirements early in the buying process help obtain the right goods or services for the best price, and can minimize the need for changes later. While requirements may vary depending on the procurement, they share the same goal of ensuring that

products that are purchased meet the needs and expectations of the client.

Some questions to ask when defining the requirement:

- What is needed?
- What should it do?
- What is the delivery date?
- Where will it be used?

Develop a Statement of Work

If the procurement approach involves a competition, the next step once the requirements are defined is helping the client develop a Statement of Work (SOW). A SOW outlines the activities, deliverables and timelines related to the procurement in clear and concise terms.

Your client's SOW should include:

- a brief introduction
- purpose of the project
- project scope
- a work breakdown structure to identify the project tasks, milestones and deliverables
- a project schedule for the tasks, milestones and deliverables
- project requirements and acceptance criteria
- payment terms and conditions

A properly developed SOW should respect the legal framework, policies, rules and socioeconomic objectives regulating the goods and services

being procured.

Plan a procurement strategy

A procurement strategy defines how a good, service or construction will be procured. At the highest level, your strategy should include the determination to proceed competitively or non-competitively and applicable details in support of industrial and regional benefits or other national objectives. The procurement strategy must satisfy the operational requirements of the client and comply with legal requirements, while achieving best value, and advancing national objectives.

When developing your strategy, you should consider:

- the method of supply
- total estimated cost including all options, as well as maintenance and storage costs, as applicable
- contract period
- delivery requirements
- the procurement schedule
- evaluation procedures and method of selection
- environmental factors
- commercial products versus customized solutions
- risk factors
- limitation of liability or indemnification
- possible use of a fairness monitor
- the participation of small and medium enterprises

- Indigenous considerations
- accessibility requirements
- other national objectives
- compatibility with existing solutions
- the opportunity to consolidate requirements
- disposal of the product, if applicable, and
- renewal (procurement of a replacement good or service and all transfer costs)

For more information

If you need additional help with the procurement process, refer to the following sections of the Supply Manual: