

1 Determine procurement requirements
1.1A. Seek input from stakeholders to identify procurement requirements. <i>For this question I will refer to the emergency light testing and replacement project carried out at a local High School recently that I was involved in.</i> <i>Stakeholders who had input into procurement include: • Project Managers (me & NP jointly) • Senior Manager (NP) • Project team members (employees) • The project sponsor representative (maintenance supervisor)</i> <i>Site meetings were held between myself, Senior Management, team members (employees who were on site) and the sponsor representative to determine what type of fittings were required to suit each specific environment.</i>
1.1B. Establish and maintain, within delegated authority, agreed procurement management plan. <i>The Procurement Management Plan spells out the:</i> <i>* Management Process (from the identification of the need for procurement through to the procurement process itself)</i> <i>For this project, it was determined that no sub-contractors were needed</i> <i>* Resources to be procured – for this project, it is only materials (not contractors) that need to be procured & the criteria that the suppliers will be assessed against (e.g.: price, availability, delivery, ease of purchase).</i> <i>REFER TO THE ATTACHED DOCUMENT TITLED "Additional Proof-Evidence BSBPMG518 - Procurement Plan"</i>
2 Establish agreed procurement processes
1.2A. Obtain information from suppliers capable of fulfilling procurement requirements. <i>I made preliminary phone calls to our primary suppliers to gauge their stock levels and willingness to deliver to site. I obtained indicative pricing from their online portals. Final pricing would be obtained when quantities were known, after the testing was completed.</i>
1.2B. Determine or adopt established selection processes and selection criteria, and communicate to vendors to ensure transparency. <i>AS OUTLINED IN THE ATTACHED PROCUREMENT PLAN, the selection criteria are:</i> <i>a) Price</i> <i>b) Availability in stock</i> <i>c) Willingness to deliver to site</i> <i>d) Suppliers from preferred list first (e.g.: primarily Rexel, L&H, Sherriff, then Voltex, Trade Zone, Sparky Direct)</i> <i>Due to the good working relationship with the primary suppliers, feedback is always provided to them regarding the status of the quote – i.e.: whether they were selected as the supplier or not. We are careful not to name the successful supplier when providing the feedback but give accurate feedback of the reason for their non-selection.</i>
1.2C. Obtain relevant approvals for procurement processes to be used. <i>The procurement processes were approved by the company director.</i>
3 Conduct procurement activities
1.3A. Identify and act according to probity and project governance constraints. <i>Acting in accordance to probity and project governance constraints for this project is discussed in the ATTACHED PROCUREMENT PLAN document.</i>
1.3B. Communicate agreed proposals and/or specifications to prospective vendors to ensure clarity of understanding of project objectives. <i>A list of materials required including manufacturer, model number, colour was sent to the prospective suppliers in a RFQ.</i> <i>The time frame for delivery was spelt out very clearly in the RFQ, to ensure that the suppliers could provide accurate availability/delivery dates.</i>
1.3C. Solicit vendor responses according to proposal requirements. <i>RFQs were submitted to the primary suppliers.</i>

1.3D. Evaluate responses and select preferred vendors according to current legal requirements and agreed selection criteria.

The quotes received were evaluated against the selection criteria (listed previously and also in the Procurement Plan) and in accordance with current legal requirements.

1.3E. Negotiate with preferred contractor or supplier, to agree on terms and conditions of supply.

The quotes received met the selection criteria and no further negotiation was required.

4 Implement and monitor procurement

1.4A. Implement established procurement management plan and make modifications in line with agreed delegations.

We communicated with the chosen supplier regularly to ensure the delivery time frames were attainable. Through that communication, it became evident that the selected supplier wasn't able to provide the total quantity of one type of fittings as they thought they would. So the local suppliers were contacted to determine if any were available in stock and purchase orders were amended to reflect the different quantities from the different suppliers.

1.4B. Review progress and manage agreed variations to ensure timely completion of tasks and resolution of conflict within the legal framework of the supply agreement.

*No contractors were used on this project – so my response pertains to the suppliers only.
As described above, the purchase quantities were amended on the Purchase Order when the chosen supplier wasn't able to provide the materials when required. New Purchase Orders were raised with the alternate supplier.*

1.4C. Identify and report procurement management issues and implement agreed remedial actions to ensure project objectives are met.

As described above. The secondary supplier was contacted immediately that it became evident that the primary supplier wouldn't be able to provide all of the materials at the time required. By acting quickly, the project time frames were still able to be satisfied.

5 Manage procurement finalisation procedures

1.5A. Conduct finalisation activities to ensure vendor deliverables meet contracted requirements.

Purchase orders were reconciled against delivery dockets and supplier tax invoices to ensure that the correct quantities of the correct items were delivered and charged at the quoted rate.

1.5B. Review project outcomes using available procurement records and information to determine effectiveness of procurement processes and procedures.

*The outcome of the project was the number of lights replaced on the reports prepared by the team members.
The number of lights on the report was compared against the materials delivered to ensure that we were supplied with, and invoiced for, the correct number and type of fittings.*

1.5C. Document lessons learned and recommended improvements for application to future projects.

Refer to the attached Lessons Learnt document.