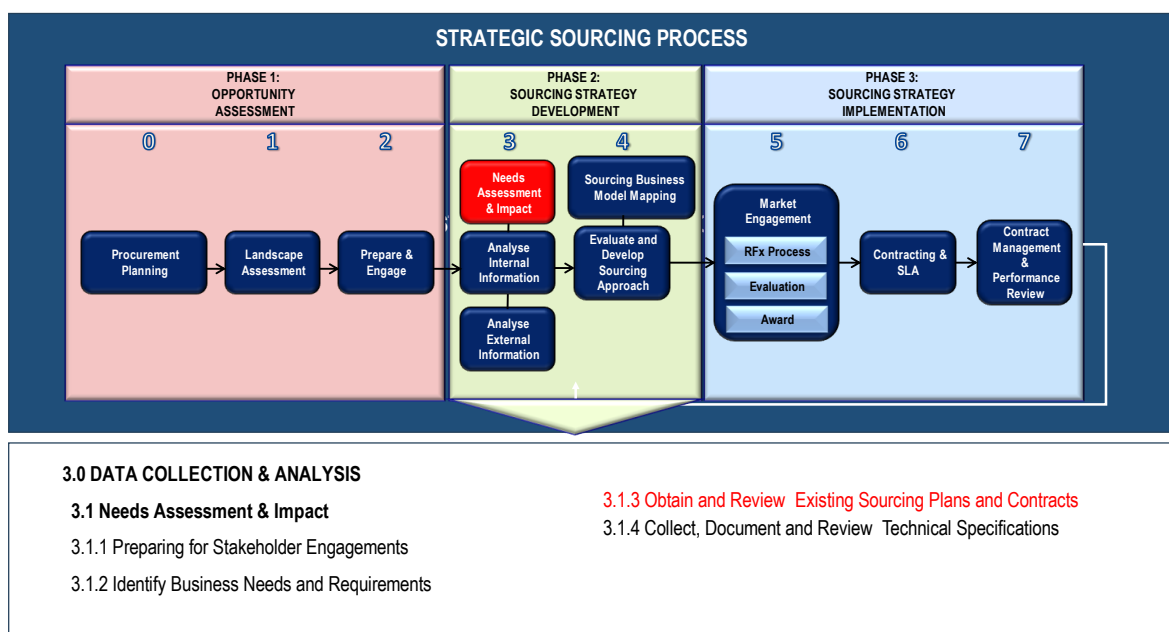


Using this guide

This guide accompanies the National Treasury's Strategic Procurement Framework (SPF) for Strategic Sourcing in the Public Sector. For more information, visit the National Treasury website at <http://ocpo.treasury.gov.za/>. The SPF can be found here: http://ocpo.treasury.gov.za/Resource_Centre/Documents/1A.%20Strategic%20Procurement%20Framework.pdf

REVIEW EXISTING SOURCING PLANS AND CONTRACTS



1.0 Introduction

- i. A review of previous procurement, from the identification of needs through supplier selection, performance and results, will inform how you proceed with your project.
- ii. It provides an opportunity to apply lessons learned.
- iii. The following good practice guides apply to this stage, review existing sourcing plans and contracts:
 - a. Review existing sourcing plans and contracts

1.1 The objective

- i. To review previous procurement history to obtain a view of current contractual obligations.
- ii. To obtain feedback from end-users to identify the lessons learned.

1.2 Output

- i. Lessons learned from previous procurement activities
- ii. Current contractual obligations

2.0 Good practice guides

2.1 Review existing sourcing plans and contracts

- i. Determine if there are any existing sourcing plans for the commodity and if there are any existing contractual arrangements.
- ii. Obtain copies of the sourcing plans and/or contracts and review them for the following information:
 - a. Contract period (Start date and expiry date)
 - b. Contract terms & conditions
 - c. Challenges experienced with the terms & conditions of the contract
 - d. Possible gaps in the Terms and Conditions
 - e. Who are the current suppliers?
 - f. How was their performance?
 - g. Prices and any price adjustments
 - h. Who are the end-users?
 - i. Do they still require the product/service?
 - j. Relevance of specifications of the items /TOR for service rendered
 - k. Actual volumes/quantities ordered off the contract

2.2 Identify the needs through stakeholder consultation

- i. The review of existing sourcing plans and contracts is done in consultation with the relevant stakeholders.

- ii. The consultation should aim to ensure that:
 - a. Stakeholders constructively engage and have “buy-in”.
 - b. Stakeholders can self-identify their current, predicted, and emerging needs.
 - c. The consultation elicits information about individual and collective needs.
- iii. From the consultation it will be important to:
 - a. Distinguish ‘needs’ from ‘wants’ and ‘desires.’
 - b. Remove ambiguity, achieve clarity, and obtain consensus.
 - c. Bundle needs into related groups.
 - d. Prioritise groups and rank them.
 - e. Develop and articulate, a clear, comprehensive high-level statement of needs.
 - f. Obtain stakeholder verification and endorsement of the statement of needs.

3.0 templates

Not applicable