

**Using this guide**

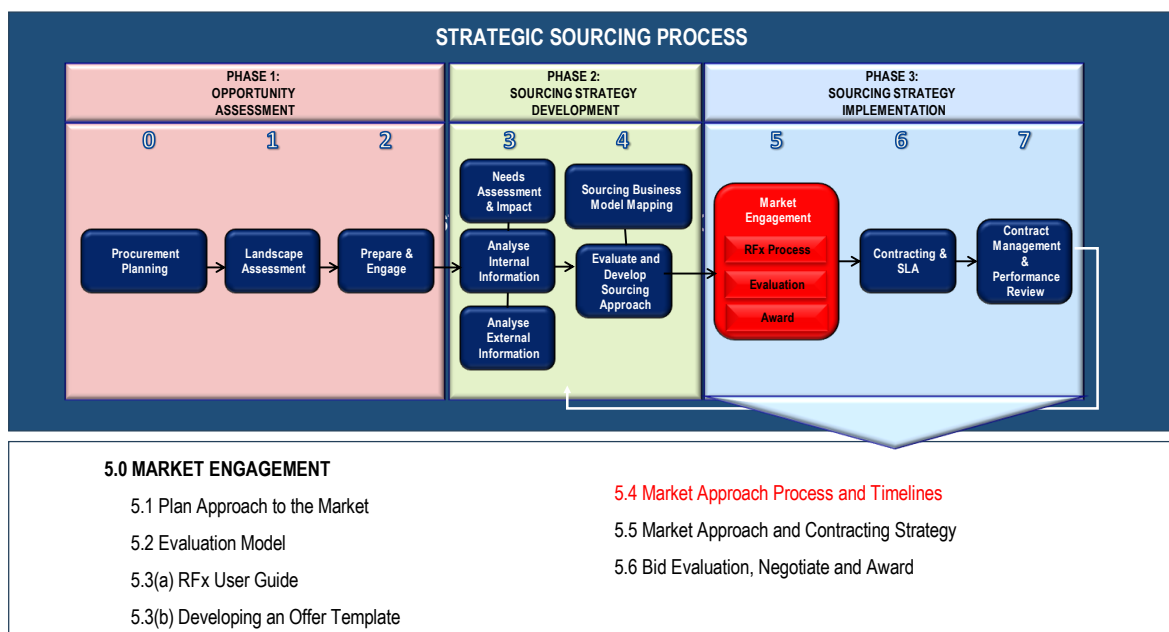
This guide accompanies the National Treasury's Strategic Procurement Framework (SPF) for Strategic Sourcing in the Public Sector. For more information, visit the

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](http://ocpo.treasury.gov.za/Resource_Centre/Documents/1A.%20Strategic%20Procurement%20Framework.pdf)

**MARKET APPROACH PROCESS AND TIMELINES**



**1.0 Introduction**

- i. This involves identifying each step in the process, assigning responsibilities, and ensuring sign-offs and approvals are built-in and plenty of time is allowed.
- ii. The following good practice guides and templates apply to market approach and timelines:
  - a. Tender flow chart and estimated timelines
  - b. Checklist for market approach and timelines (template)

**1.1 The objective**

- i. To assist procurement practitioners with developing a realistic timetable for the procurement process.

## **1.2 Output**

- i. Process flow and timetable for each of the process steps

## **2.0 Good practice guides**

### **2.1 Tender flow chart and estimated timelines**

- i. Having decided the approach to market strategy, evaluation methodology, due diligence requirements, timetable and type of contract, all of this information should be recorded in your Strategic Sourcing Business Case.
- ii. The Strategic Sourcing Business Case is a critical internal planning and control document for the management and handling of the procurement.
- iii. Include in the Strategic Sourcing Business Case a well-supported and logical submission explaining how the approach to market will best satisfy the procurement objectives.
- iv. The level of effort in developing the procurement plan and the detail contained in the plan should be proportional to the nature, scope, value, level of risk and complexity of the procurement.
- v. The following diagram depicts an example of the typical tender process and estimated time for each process step.
- vi. This may vary depending on the government institution's internal governance structures and approval processes.



**Figure 1: Tender Flow Chart and Estimated Timelines**

### 3.0 Templates

#### 3.1 Checklist for market approach and timelines

The checklist will assist in ensuring that all the key elements have been attended to.

	Aspect	Addressed (Y/N) ✓
1.	Identify key tasks and milestones in the various stages of the approach to the market through to award of the contract	
2.	Identify stages where approvals or sign-offs are required and by whom	
3.	Identify individuals to be appointed to the evaluation panel	
4.	Obtain Conflict of Interest and Confidentiality agreements	
5.	Assign key tasks to team members	
6.	Set a realistic timeline for: <ul style="list-style-type: none"> <li>• approach to market and submission of offers</li> <li>• evaluation of offers</li> <li>• identification of preferred supplier</li> <li>• due diligence</li> <li>• negotiations</li> <li>• contract development</li> <li>• handover from the previous contract or lead time for a new supplier to start delivering.</li> </ul>	

**Table 1: Checklist for Market Approach Process and Timelines**