

PME6

## Procurement and Contract Management

**3 Days**

The procurement of complex goods and services is an important component of most projects. These goods and services can be procured internally from within the organization or from external suppliers. Determine how to conduct a procurement requirements analysis, develop a procurement plan, then execute, oversee, and close procurements over their lifecycle. Learn how to develop specifications, statements of work, evaluation criteria, and bases of payment. A mix of case studies, exercises, and group discussions contribute to a comprehensive learning experience.

### WHO SHOULD ATTEND

- New project managers
- Prospective project managers, project coordinators or project team members
- Those looking to pursue a career in project management

This course is eligible for 21 Project Management Institute Professional Development Units.

### KEY TOPICS COVERED

- Aligning procurement processes with the project life cycle
- Key terms used in the procurement process
- Requirements definition and procurement planning
- Sourcing and selection strategies
- Creation of fundamental procurement documents including specifications, statements of work specifications, evaluation criteria and pricing structures
- Proposal evaluation
- Contract administration challenges and solutions

### PREREQUISITES

- PME1: Introduction to Managing Projects

## COURSE OUTLINE

### Introduction

- Course Objectives Overview
- Course Logistics and Evaluation Details

### Module 1: PM Procurement Processes and Context

- Project and Operations Context
- Project Management Processes Overview
- Procurement Management Overlay
- Contractor/Client Relationship Dynamics
- Roles and Relationships Before and After Contract Award
- Concept of Privity in Contracts

### Module 2: Requirements Definition

- Introduction to Procurement Planning
- Defining Project Requirements
- Understanding Requirement Types (Business, Stakeholder, Solution, Functional, Non-functional, and Transition Requirements)
- Crafting Statements of Requirements (SoR)
- Specifications vs. Statements of Work
- Task/Design-Based vs. Solutions/Performance-Based Requirements

### Module 3: Procurement Strategy

- Steps in Procurement Planning and Strategy Development
- Considerations for Procurement Strategy (Good, Service, Mix, One Time or Repeat Procurement, Estimated Cost, Market Capacity, Security/Intellectual Property, etc.)
- Methods of Supply (Low Value Acquisition, Purchase Order, Non-competitive Contract, Competitive Contract, Contracts with Options, Task Authorizations, Standing Offers, Supply Arrangements)
- Detailed Overview of Each Method of Supply

### Module 4: Statements of Work

- Developing Statements of Work (SoW)
- SoW vs. Specifications vs. Standards
- Contents of a SoW (Title, Objective, Background, Scope, Tasks, Deliverables, Schedule, Constraints & Assumptions, Client Support)
- Best Practices for Drafting SoWs
- Exercises on Developing SoW for Project Scenarios

### Module 5: Evaluation Criteria

- Developing Evaluation Criteria for Contractor Selection
- Purpose and Types of Evaluation Criteria (Technical and Financial)
- Selection Strategy Based on Evaluation Criteria
- Competency Assessment Based on SoW
- Methods of Evaluating Competency
- Example Evaluation Criteria Development for Tester Role

### Module 6: Soliciting & Evaluating Proposals

- Pre-Solicitation Requests (RFI, SOI, P&A, Industry Engagement)
- Solicitation Methods (RFQ, ITT, RFP, ITC, RFSO, RFSA)
- Standard Instructions and General & Supplemental Conditions in Solicitations
- Solicitation and Proposal Evaluation Process Overview
- Practical Exercise on Solicitation and Evaluation Process

### Conclusion

- Course Wrap-Up and Feedback Session
- Assessment Overview and Certification Process

## ABOUT THE PROJECT MANAGEMENT ESSENTIALS CERTIFICATE PROGRAM

The Project Management Essentials program offers practical, hands-on training in the fundamental knowledge and skills needed in today's project management field. Crafted by top industry experts and educators, this comprehensive program blends industry insights with best practices, delivering a well-rounded training experience for both experienced Project Managers and individuals aspiring to build a career in project management.

You can take any five of the seven courses in any order, either as standalone courses or to fill specific knowledge gaps. To earn the certificate, you must complete all seven courses within three years, with the first course being Introduction to Managing Projects and the final course being Project Implementation and Closure. Successful completion of the program will earn you a Project Management Essentials certificate from Algonquin College.

### Courses in the Project Management Essentials program include:

- Introduction to Managing Projects (3 days)
- Resource, Communications and Stakeholder Management (3 days)
- Project Schedule and Cost (3 days)
- Project Risk Management (3 days)
- Project Quality Management (2 days)
- Procurement and Contract Management (3 days)
- Project Implementation and Closure (3 days)

## HOW TO REGISTER

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