



# Procurement 101 Webinar

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June 15, 2016



U.S. Department of Transportation  
Federal Transit Administration

# Agenda – Procurement 101

- Introduction
- Procurement Overview
  - Ryan Hammon, Transportation Program Specialist, FTA Region 8
- Case Studies/ProcurementPRO
  - Mike LaBello, Principal, Main Street Connections
- Questions and Answers

# ProcurementPRO

## Create a New Project

Start

Welcome to ProcurementPRO, a web based software program designed to help assist transportation professionals conform to federal procurement standards when utilizing federal funds. Below you will find two ProcurementPRO options and their descriptions to aid in managing your procurement project.

**ProcurementPRO** -- The full version of ProcurementPRO provides federally required clauses, certifications, and other useful documentation for your project(s). It offers the ability to create, save and edit a project; creates a printable document; and is organized in a tab format to help you manage project flow and files.

[Get Started](#) →



**QuickPRO** -- This is a shortened version of ProcurementPRO built for the transportation professional who wishes only to secure the necessary federally required clauses and certifications but not manage a project online. Users are able to print the required clauses and certifications but cannot save projects for future reference.

[Get Started](#) →

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[Cancel](#) ✕

## Federal Portal View

*Get Started*

- Click Get Started

# ProcurementPRO

**Procurement Type** Step **1** of **6**

The "Procurement Type" is the type of item being purchased. Projects will fall into one of eight (8) categories as listed below.

Please check the appropriate procurement type from the list below and click next.

<input type="checkbox"/> Rolling Stock	Help ?	Example	👁
<input type="checkbox"/> Materials and Supplies	Help ?	Example	👁
<input checked="" type="checkbox"/> Professional Services	Help ?	Example	👁
<input type="checkbox"/> Architecture	Help ?	Example	👁
<input type="checkbox"/> Engineering	Help ?	Example	👁
<input type="checkbox"/> Architecture & Engineering	Help ?	Example	👁
<input type="checkbox"/> Operations and Management	Help ?	Example	👁
<input type="checkbox"/> Construction	Help ?	Example	👁

*ProcurementPRO - National RTAP's Procurement Software Application*

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## Step One

- Select Procurement Type

Click Next

# ProcurementPRO

**Procurement Cost** Step **2** of **6**

Procurement is the acquisition of appropriate goods and/or services that meet the needs of the purchaser at the best possible value. Begin below by entering the cost estimated for the acquisition of a particular item or service. You may utilize two methods to arrive at a total cost (By Unit or Lump Sum).

If "By Units" method, enter "# of Units" and "Cost per Unit," click calculate, then click next. If by "Lump Sum" method, enter total "Estimated Budget," then click next.

# of Units?

Cost Per Unit  **+ Calculate**

Total Cost  or

Estimated Budget

*A Federal Procurement will fall under one of three cost thresholds: Micro-Purchase (Up to \$3,000), Small Purchase (\$3001-\$100,000), and Sealed BID or Competitive Proposal (Above Small Purchase Threshold).*

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## Step Two

- Total cost or estimated budget entered will prompt appropriate methods of procurement based on established thresholds within the program
- After calculation click Next



# ProcurementPRO



**Procurement Threshold** Step **3** of **6**

Based on your calculation, this project's procurement threshold falls within the range stated below. Please click "Next" to continue.

Procurement Threshold

Sealed BID or Competitive Proposal

Help  Example 

## Step Three

- A brief description of the federal threshold your project cost has produced is provided.
- Click Next

# ProcurementPRO

**Procurement Method** Step **4** of **6**

Below are the minimum competitive procedure(s) that can be used for this project based on federal procurement thresholds. The selected procedure must comply with State and local procurement requirements as well as with Federal requirements.

After selection of the appropriate method, please click Next.

<input type="checkbox"/> Invitation for Bid (IFB)	Help ?	Example
<input checked="" type="checkbox"/> Request for Proposal (RFP)	Help ?	Example
<input type="checkbox"/> Sole Source	Help ?	Example

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## Step Four

- Due to the federal thresholds, IFB, RFP and Sole Source are the available selections in the program.
- Select your “Method of Procurement” and click Next




# ProcurementPRO


**Project Detail** Step 5 of 6

The Project Detail section allows for management of program and agency contact information, project identification numbers, project milestones and other items. This allows all your procurement project information to be stored electronically in one place and printed.


Include a project title if you wish to save this project. You may open or close sections by clicking their section arrow.


Print On Project Summary Page 


\* Title of Project


Information Technology Project 


Description of Project


Project Detail 





Project Grantee Information 

Federal Transit Administration Information 

State Agency Information 

Other Contact 

Milestone 

 Back  Cancel  Next 

## Step Five

- Enter Project Title (required) and any additional project information you wish to track
- Click Next



# ProcurementPRO

## Tab Structure

Step 6 of 6

This is your complete procurement file based on all your prior entries into ProcurementPRO. It can be modified through the editing process contained within the software, and allows for ongoing management and review of this procurement. It provides an organized set of Tabs suitable for download to your local network and printout for file retention.

When you are satisfied with the results, please click the preview or save choices at the bottom of your screen to complete the process.

- Cover Sheet
- Tab 1 – Introduction and Instructions to ProcurementPRO
- Tab 2 – Procurement Management Master Checklist
- Tab 3 – Project Information
- Tab 4 – Solicitation Development Checklist
- Tab 5 – Solicitation and BID Opening Checklist
- Tab 6 – Project Award and Contract Administration
- Tab 7 – Progress Reports
- Tab 8 – Project Close-Out

Preview 

Save to my Computer 

Save & Return to Dashboard 

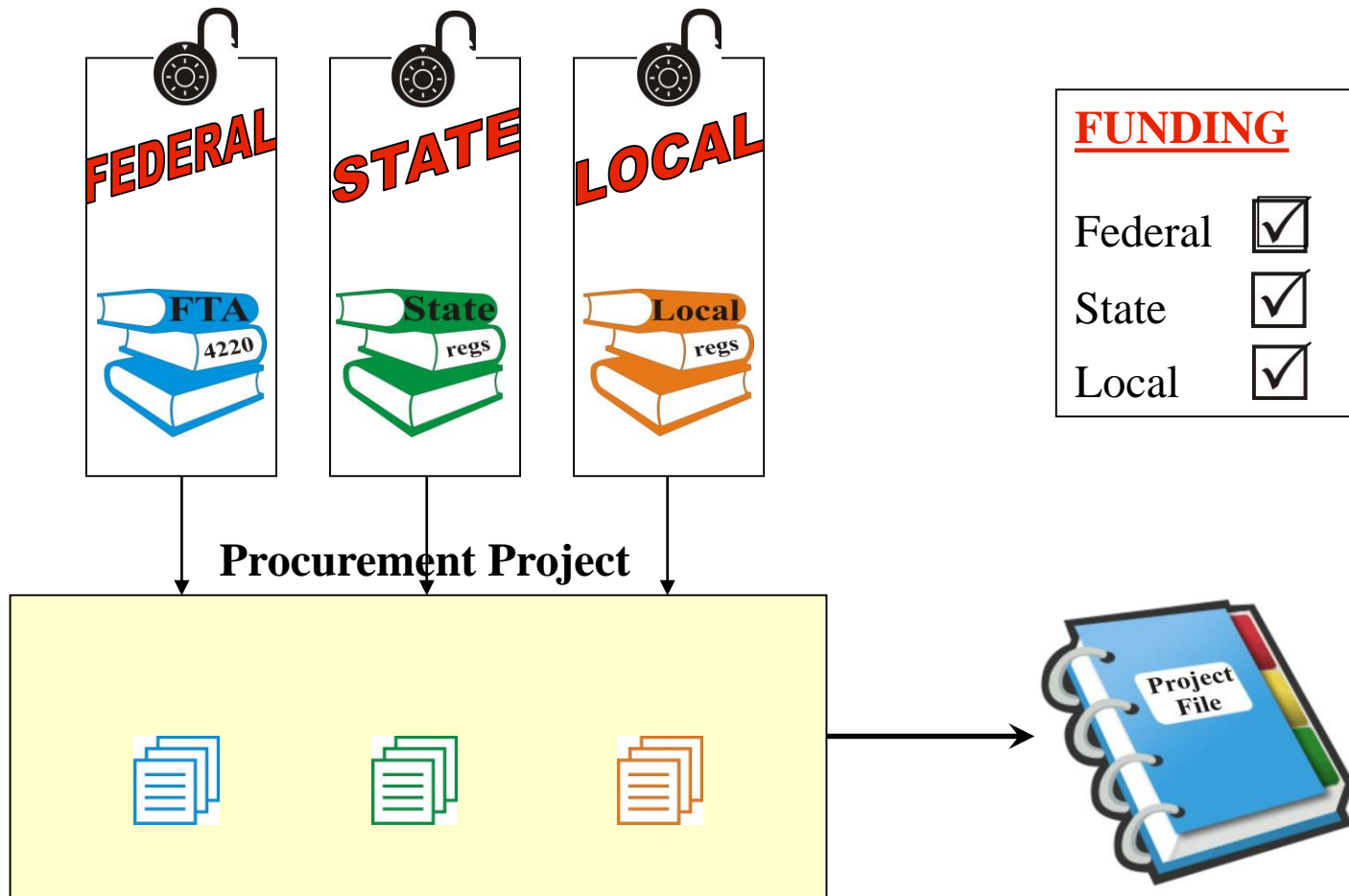
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## Step Six

- Quick view to see what will print out in the TABS, with option for preferred print
- Save project to computer or your dashboard for future use

# ProcurementPRO

## Portal Design



# Contact Information - Presenters

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*The recording and slides will be posted at [nationalrtap.org/webinars](http://nationalrtap.org/webinars)*



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