

Stage 1 – Initiate project

This phase in the procurement lifecycle is about initiating and planning the project so as to ensure the right people do the right things at the right time and the procurement activity achieves the best possible outcomes. Key activities focus on establishing your project team, initiating engagement with stakeholders through to establishing project probity, governance and management frameworks.

Below are some specific guides, tools, templates and training relevant to this stage in the procurement lifecycle. These resources are not intended to be an exhaustive list. We recommend you read the [Guide to Mastering Procurement \[1 MB PDF\]](#), which covers this stage in detail, within the context of the end-to-end lifecycle.



[Policy and guidance](#)



[Tools and templates](#)



[Training](#)



Policy & guidance

Policy

- [MED: Government Procurement in New Zealand – Policy Guide for Purchasers - August 2007](#)
- [MED: Mandatory Rules for Procurement by Departments \[88 kB PDF\]](#)

Guides

- [MED Guide: Mastering Procurement \[1 MB PDF\]](#)
- [MED Guide: Annual Procurement Plans \(APPs\) \[473 kB PDF\]](#)
- [MED Quick Guide: Conflict of Interest \[299 kB PDF\]](#)
- [OAG: Procurement Guidance for Public Entities](#)
- [OAG: Public sector purchases, grants & gifts: Managing funding arrangements](#)
- [SSC: Understanding the Drivers: Value for tax dollar spend Factsheet](#)
- [SSC: Gateway Review Process \(for high risk capital projects\)](#)
- [Treasury: Better Business Cases for Capital Proposals](#)

Procurement options

Emergency procurement

- [MED Quick Guide: Emergency Procurement \[49 kB PDF\]](#)
- [MED: Procurement Advisory Note – Canterbury Earthquake \[24 kB PDF\]](#)

Syndicated procurement

- [MED Guide: Syndicated Procurement \[859 kB PDF\]](#)
- [Current Syndicated Contracts](#)

Panel contracts

- [Panel contracts \(paragraph 42 Mandatory Rules\) \[88 kB PDF\]](#)

All-of-Government Contract options

- [Passenger Vehicles](#)
- [Desktop & Laptop Computers](#)
- [Single & Multifunction Print Devices](#)
- [Office Consumables](#)

Category specific requirements

- [NZTA: Land Transport Management – Procurement Manual](#)
- [DOL: Principles for the Property Services Industry](#)
- [DOL: Construction Tendering Process: Health & Safety Guide](#)
- [SSC: Guidance for Managing & Monitoring Major IT Projects](#)
- [SSC/MoRST: Cabinet Guidelines for Intellectual Property from Public Service Research Contracts](#)
- [SSC: Guidelines for preparing e-government business case](#)
- [The Treasury: Guidance for Public Private Partnerships in New Zealand](#)
- [Cabinet: Capital Asset Management – Expectations](#)
- [OAG: Achieving Public Sector Outcomes with Private Sector Partners](#)
- [NZCIC: Principles of Best Practice: Construction Procurement in New Zealand](#)

Sustainable procurement

- [MAF: NZ Timber & Wood Products Procurement Policy](#)
- [MED: Category Reviews: Standards, Guidelines & Targets for Core Public Service Departments \[565 kB PDF\]](#)
- [APCC: Australia and New Zealand Government Framework for Sustainable Procurement](#)

MED: 7 Guides to Sustainable Procurement

- [Guide 1: Identifying Sustainable Procurement Priorities \[345 kB PDF\]](#)
- [Guide 2: Identifying Needs and Assess Risk \[343 kB PDF\]](#)
- [Guide 3: Evaluate and Select Suppliers \[291 kB PDF\]](#)
- [Guide 4: Define Specifications and Invite Tenders \[303 kB PDF\]](#)
- [Guide 5: Evaluate Suppliers and Award \[319 kB PDF\]](#)
- [Guide 6: Audit and Improve Suppliers \[316 kB PDF\]](#)
- [Guide 7: Manage the Contract and Disposal Route \[296 kB PDF\]](#)

Contracting with Non-Governmental Organisations

- [The Treasury: Guidance for Contracting with NGOs](#)
- [OAG: Principles to underpin management by Public entities of funding to NGOs](#)
- [OAG: Managing Funding to NGOs](#)
- [Office of Community & Voluntary Sector: Code of Funding Practice](#)

Related guidance, standards and ethics

Standards and ethics

- [OAG: Managing Conflicts of Interest](#)
- [SSC: Guidance on gifts, benefits & gratuities](#)
- [SSC: Standards of Integrity & Conduct](#)

Use of public funds

- [The Treasury: Guide to the Public Finance Act](#)
- [OAG: Controlling sensitive expenditure](#)

Related guidance

- [SSC: Factors for successful coordination \(help State Agencies coordinate effectively\)](#)
- [SSC: Principles for interaction with social media](#)
- [SSC: Planning and managing for results](#)
- [SSC: Performance measurement – advice and examples on how to develop effective frameworks](#)



Tools & templates

Annual Procurement Plan

- [MED Template: Annual Procurement Plan \[3.5 MB XLS\]](#)

Conflict of interest

- [MED Template: Conflict of Interest & Confidentiality Agreement \(panellist\)](#)
- [MED Template: Conflict of Interest & Confidentiality Agreement \(panel chair\)](#)



Training

- [Demystifying Procurement](#)
- [Procurement Planning](#)
- [Managing Risk in Procurement & Contract Management](#)