RACI MATRIX FOR THE USE OF TRELLO FOR TENDERING PROCEDURES AND CONTRACTS

Objective

The objective of the RACI Matrix is to provide guidance to all members of the Procurement Service to ensure standardisation and best practice in the use of Trello for tendering procedures and contracts.
The procedures apply to the following Trello Boards:

- *Trello – MS/IT/DO*
- *Trello – Contracts*

Understanding RACI matrix

Letter	Definition	Symbol
R	Responsible / Driver: • Who is responsible for the execution of the task?	
A	Approval / Signature: • Who has the authority to take decision? • Who signs the document?	
C	Consulted / Supports: • Who can provide expertise or support?	
I	Informed / Recipient: • Who needs to be updated of the progress? • Anyone whose work and/or task depends on this task?	

: Responsible / Driver
: Approval / Signature
: Consulted / Supports
: Informed / Recipient

Contents

: Responsible / Driver

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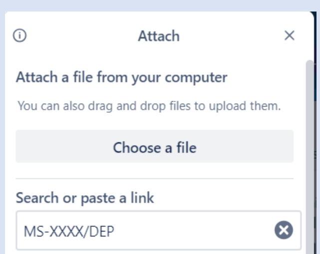
1. DO, MS, IT

1.1 Before dispatch

Step	Roles	
	Procurement Officer	DO-IT Team
Create a card in the relevant list of the [Trello Board:](#) - For a DO >50kCHF: when the DR is fully signed or - For a DO <50kCHF: when the need is notified by the TO. *Tip:* *Card naming convention: DO/MS/IT-XXXXX/DEP – description* *Fill in the following information – custom fields:* - *Label: With procurement officer* - *Description: Add a short description or notes on the status, as and when needed* - *Status: In preparation* - *Department: the one involved in the tender* - *Section: IPT/PI section concerned* - *FC: Yes/No* - *PO: automatically filled with the PO's name* - *Technical: Tech 1 in the technical description* - *DR: EDH link* - *Checklist: new actions can be added if needed.* - *When creating a card for a new MS, the IT card can be created at the same time.* - *If the card is for an IT following an MS, both Trello cards can be linked together together:*  		
Update the card to show progress: - Label: update of "With procurement officer" or "With technical officer" fields - Checklist: add any relevant items and tick the relevant boxes before dispatch when the step is completed - Description: add notes on the status, as and when needed		

: Responsible / Driver
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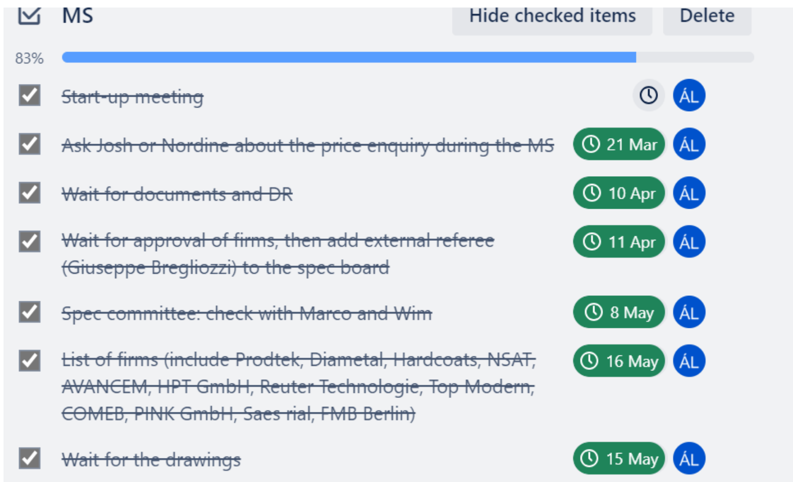
Tip: deadlines can be set for each action by clicking on the clock symbol on the right, as shown below.



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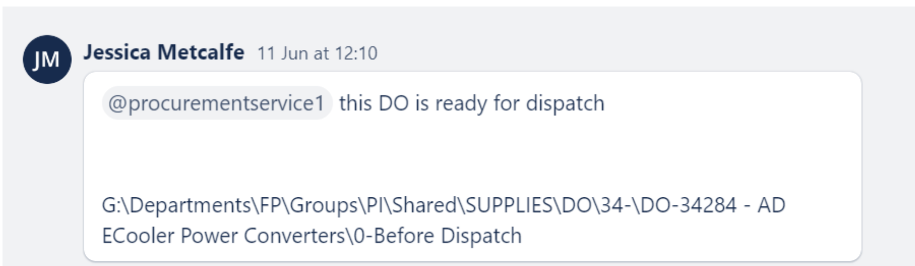
1.2 Dispatch

Step	Roles	
	Procurement Officer	**DO-IT Team**
When the DO is ready for Dispatch: - Make sure the checklist is updated; - Set the label of the card as "with Procurement Service"; - Tick "résumé du dossier" once it is signed in EDH. The signature of the RDOS will notify the DO-IT that it is ready for dispatch. *Warning: Do not tick the "Dispatch" box, it will be ticked by the DO-IT team when the dispatch is completed.*  JM Jessica Metcalfe 11 Jun at 12:10 @procurementservice1 this DO is ready for dispatch G:\Departments\FP\Groups\PI\Shared\SUPPLIES\DO\34-\DO-34284 - AD ECooler Power Converters\0-Before Dispatch		
Inform the DO-IT Team and the PO you are in charge of administrative follow-up of the DO by adding your name as a member, and check if custom fields have been filed and update them, if necessary.		
Dispatch the DO following the standard procedure.		
Following the publication of the DO, when notification emails are sent to firms / ILOs / manager: - tick "dispatch" in the checklist (the status will automatically change); - update the due date with the deadline; - add the CDS E-Tendering link.		

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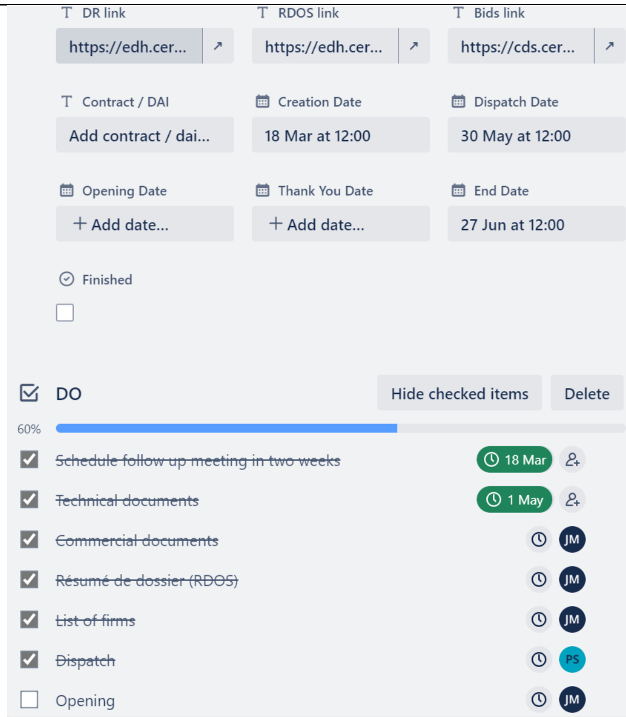
<table>
<tr>
<td>
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</table>

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1.3 After disptach

<table>
<tr><th rowspan="2">Step</th><th colspan="2">Roles</th></tr>
<tr><th>Procurement Officer</th><th>DO-IT team</th></tr>
<tr><td>If a clarification or a deadline extension needs to be sent, add the label “With Procurement service” on the card to inform the DO-IT, and create a new comment to the attention of “@procurementservice1” with the request.

Tip: for any communication with the DO-IT team, post a comment in the card with the format “@procurementservice1 + message” and add the label “With Procurement Service” to the card</td><td></td><td></td></tr>
<tr><td>Update the due date with the new deadline in the card.</td><td></td><td></td></tr>
<tr><td>When the submission deadline is reached, create a new comment on the card to inform the PO that he/she can open the DO.</td><td></td><td></td></tr>
<tr><td>After the opening, update the card by ticking the “Opening” box in the card.

Tip: It is important to update the card regularly to keep track of the procedures, in particular in case of absence.</td><td></td><td></td></tr>
<tr><td>When the award table is completed, tick the corresponding box.

</td><td></td><td></td></tr>
<tr><td>When the DAI or the contract is signed:
- insert the related DAI/contract reference in the “contract / DAI box” of the card;
- tick the box in the checklist and thank you letters can be sent and add a comment to the attention of “@procurementservice1” to inform the DO-IT.</td><td></td><td></td></tr>
</table>

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Tip: Thank you letters should not be sent in case CERN has only received two or three bids.		
Send the thank you letters following the DO-IT standard procedure. The next day, when the thank you letters are saved in the relevant Shared folder, tick the box "Thank you letters" in Trello.		Responsible / Driver
When every step is finished, tick "finished" to close the card *Tip: Ticking "finished" will automatically archive the card at the end of the week. Do not manually archive the card as DO-IT team is doing reports based on Trello.*	Responsible / Driver	

2. CONTRACT AND AMENDMENT CIRCULATION

2.1 Internal and EDH circulation

<table>
<tr><th rowspan="2">Step</th><th colspan="2">Roles</th></tr>
<tr><th>Procurement Officer</th><th>DO-IT Team</th></tr>
<tr><td>Create a card in the relevant list of the Trello board:
- when DO-IT team confirms the contract reference; OR
- when drafting the amendment.

Tip:
Card naming convention: XXXXX/DEP/(ADDX) – description
Fill in the following information – custom fields:
- Label: With procurement officer
- Description: Add a short description or notes on the status, as and when needed
- Status: IPT Circulation automatically filled
- Department: the one involved in the contract
- Section: IPT/PI section concerned
- Supplier Name
- FC: Yes/No + FC ref if necessary
- PO: automatically filled with PO's name
- Technical: Tech 1 in the technical description
- DR: EDH link

- Checklist: new actions can be added if needed.</td><td></td><td></td></tr>
<tr><td>Update the card to show the progress:
- Label: update of “With procurement officer” or “With technical officer” fields;
- Checklist: add any relevant items and tick the relevant boxes before dispatch when the step is completed;
- Description: add notes on the status, as and when needed.

Tip: deadlines can be set for each action by clicking on the clock symbol on the right, as shown below.</td><td></td><td></td></tr>
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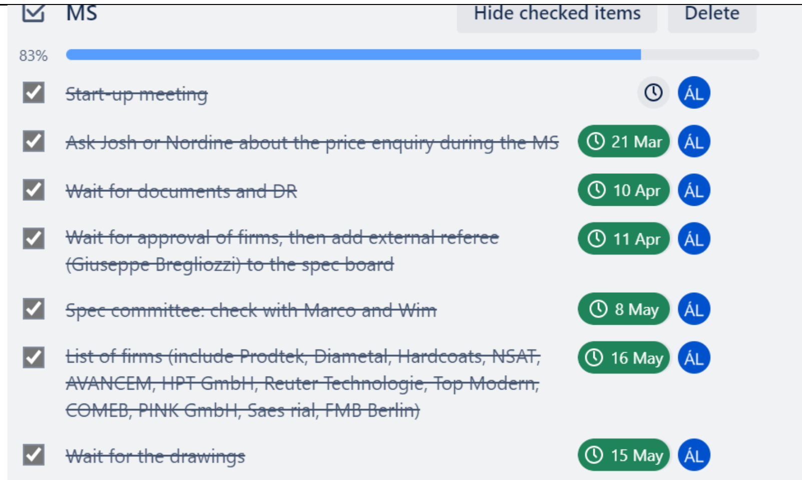
<tr><td>
</td><td></td><td></td></tr>
<tr><td>Inform DO-IT team to start the internal circulation :
- Make sure the checklist is updated;
- Set the label of the card as “with Procurement Service”;
- Write a comment “@procurementservice1” to inform the DO-IT team that the document is ready for internal circulation.

Warnings: Do not tick the “Internal circulation” box to notify the DO-IT team. Boxes should be ticked only when the step has been completed.

Tip: for any communication with the DO-IT team, post a comment in the card with the format “@procurementservice1 + message” and add the label “With Procurement Service” to the card

Reminder: the pink minute should be completed by the PO before launching the internal circulation

</td><td></td><td></td></tr>
<tr><td>Start the internal circulation following the standard procedure.
Once the document is sent for internal circulation, change the label to “In circulation”</td><td></td><td></td></tr>
</table>

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Once the circulation is completed, tick “IPT circulation” in the checklist.		
When the document is ready for EDH circulation : - Make sure the checklist is updated; - Set the label of the card as “with Procurement Service”; - Write a comment “@procurementservice1” to inform the DO-IT team that the document is ready for EDH circulation.		
Start the EDH circulation following the standard procedure. Once the document is sent for EDH circulation, change the label to “In circulation”		
Once the EDH circulation is completed, tick “EDH circulation” in the checklist.		

2.2 Final circulation

Step	Roles	
	Procurement Officer	**DO-IT Team**
When the contract or amendment is ready for signature: - Make sure the checklist is updated; - Set the label of the card as “with Procurement Service”; - Write a comment “@procurementservice1” to inform the DO-IT team that the document is ready for signature. In the comment, provide the name and emails of the signatories (or address if paper signature).  Hello @procurementservice1 , le KE5817 est prêt pour signature: • Firme : y.thomas@microhumus.fr • CERN: Cristina, Chris, Michael Benedikt Merci d’avance !		
Start the final signature process following the standard procedure. Once the document is sent for final circulation, change the label to “In circulation”.		

 : Responsible / Driver  : Approval / Signature

 : Consulted / Supports  : Informed / Recipient

Once the contract or amendment is signed: - Tick “Signature” in the checklist. The signature date will automatically be updated in the card; - Upload the documents into CDS and put the CDS link into the relevant box in the card.		
Go to the DO or IT card: - tick “contract or order signed”; - put the reference of the contract; - Tick the “Finished” box when the card is complete. *Tip: Ticking “finished” will automatically archive the card at the end of the week. Do not manually archive the card as DO-IT team is doing reports based on Trello.*		

 : Responsible / Driver

 : Approval / Signature

 : Consulted / Supports

 : Informed / Recipient